



Business Intelligence (BI)


Using Data to Create Visual Insights



FINANCIAL RHYTHM



Philip Campbell



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Here's What We Will Cover

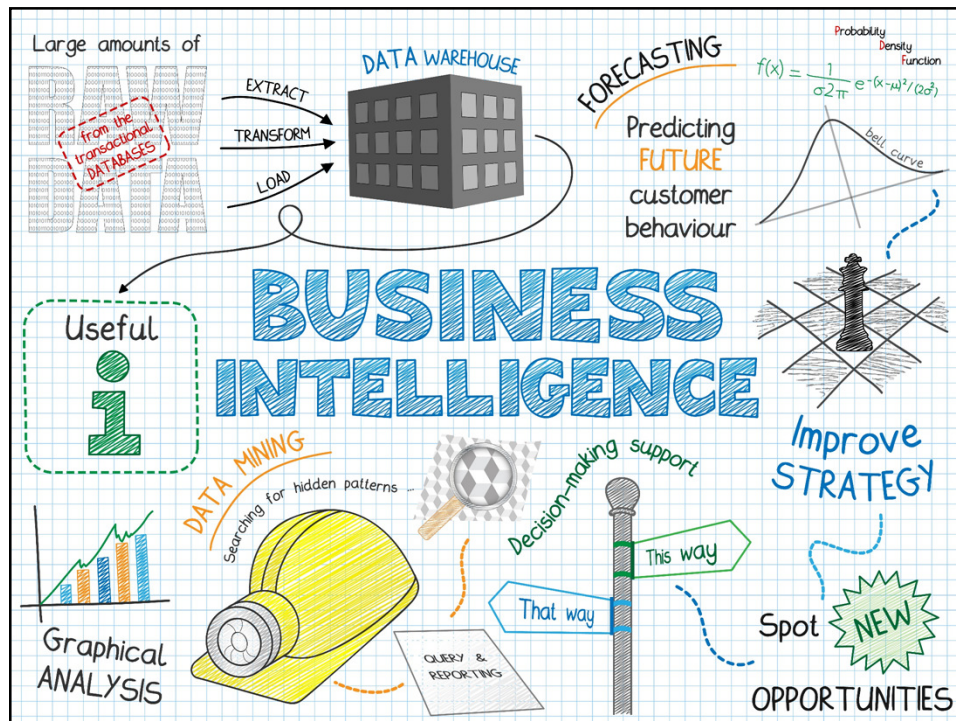
- BI and dashboard tools are improving... fast!
- The specific tool/software that changed everything for me
- Show examples of dashboards and visuals of data (which you can download and play with)
- How to get started fast... without any budget and without asking for permission

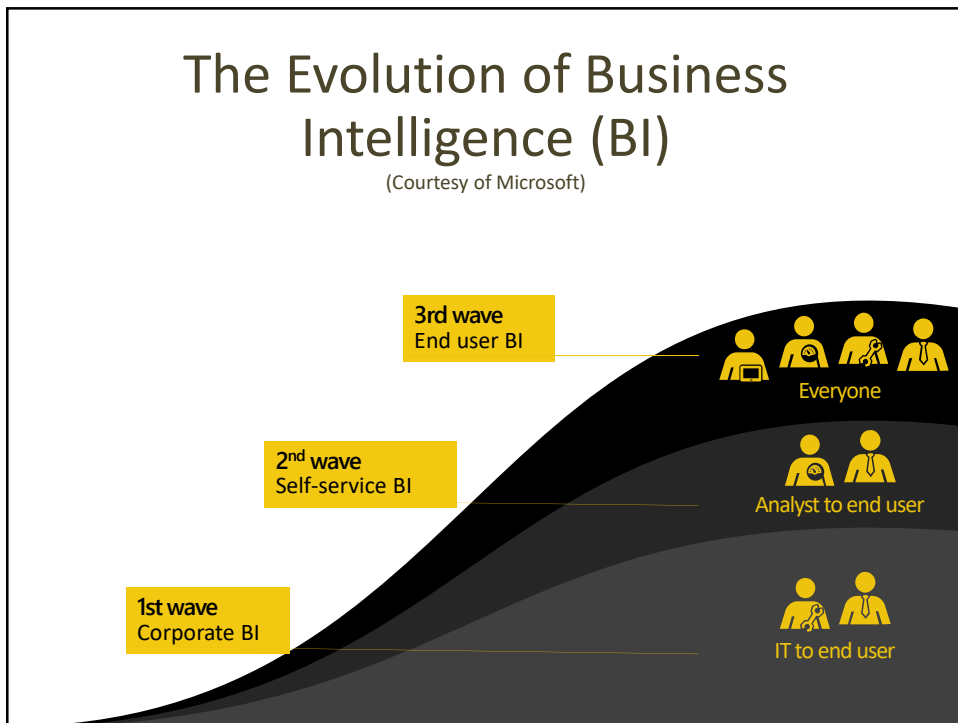
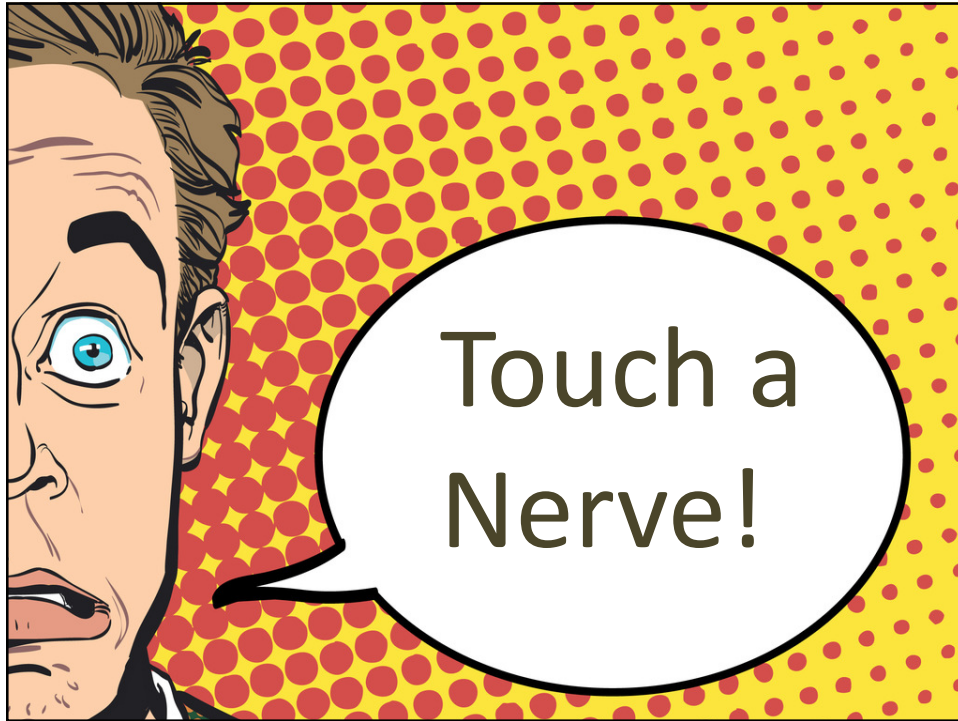
Business Intelligence (BI)

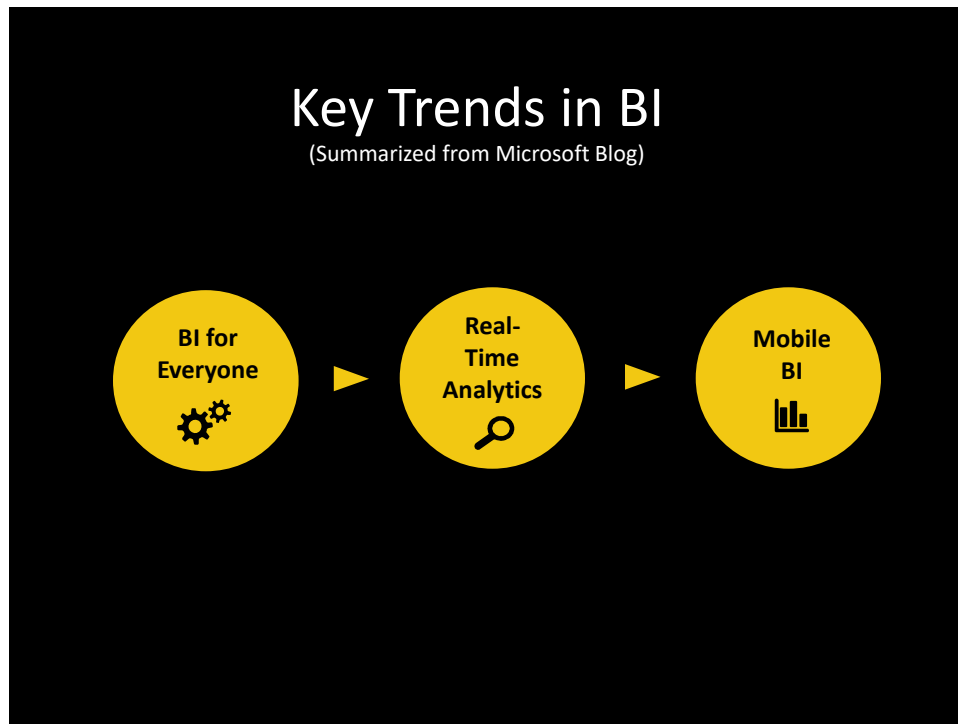
Business Intelligence (BI)

An umbrella term that includes the applications, infrastructure and tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance.

- Definition provided by Gartner







BI for Everyone

```
graph TD; A((BI for Everyone)) --> B((Real-Time Analytics)); B --> C((Mobile BI));
```

- The “democratization” of data
- IT department supports rather than controls data and tools
- Self-service analytics
- Explore data and ask “natural language” questions
- Encourages better, faster business decisions

The slide features a vertical flow diagram on the left side, consisting of three yellow circles with icons and text, connected by downward-pointing triangles. The top circle is labeled 'BI for Everyone' with a gear icon, the middle one 'Real-Time Analytics' with a magnifying glass icon, and the bottom one 'Mobile BI' with a bar chart icon. To the right of this diagram is a white box with a black border containing the title 'BI for Everyone' and a bulleted list of five points.

BI for Everyone

Real-Time Analytics

Mobile BI

Real-Time Analytics

- Visualization made easier
- Connect to a variety of data sources
- Automate the loading and transformation process
- Interactive dashboards and reports
- Sharing helps drive action

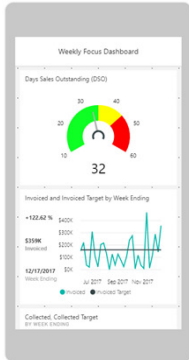
BI for Everyone

Real-Time Analytics

Mobile BI

Mobile BI

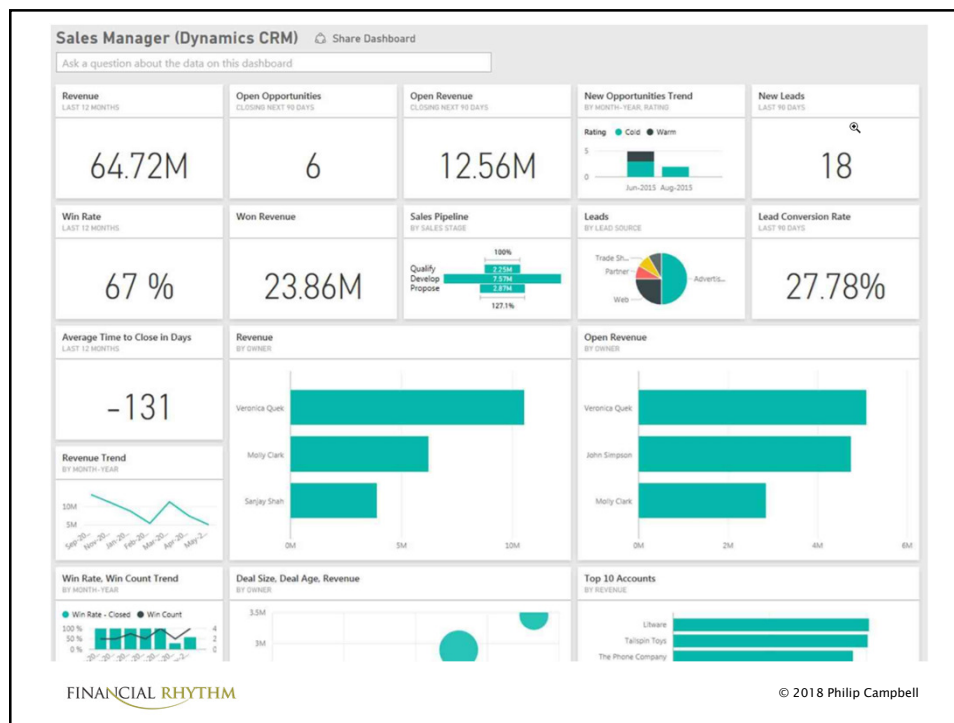
- Forces you to hone in on the metrics that matter
- Promotes easy-to-understand metrics
- Create automated alerts and notifications
- Speeds up the feedback loop
- Make insights available anytime, anywhere, on any device

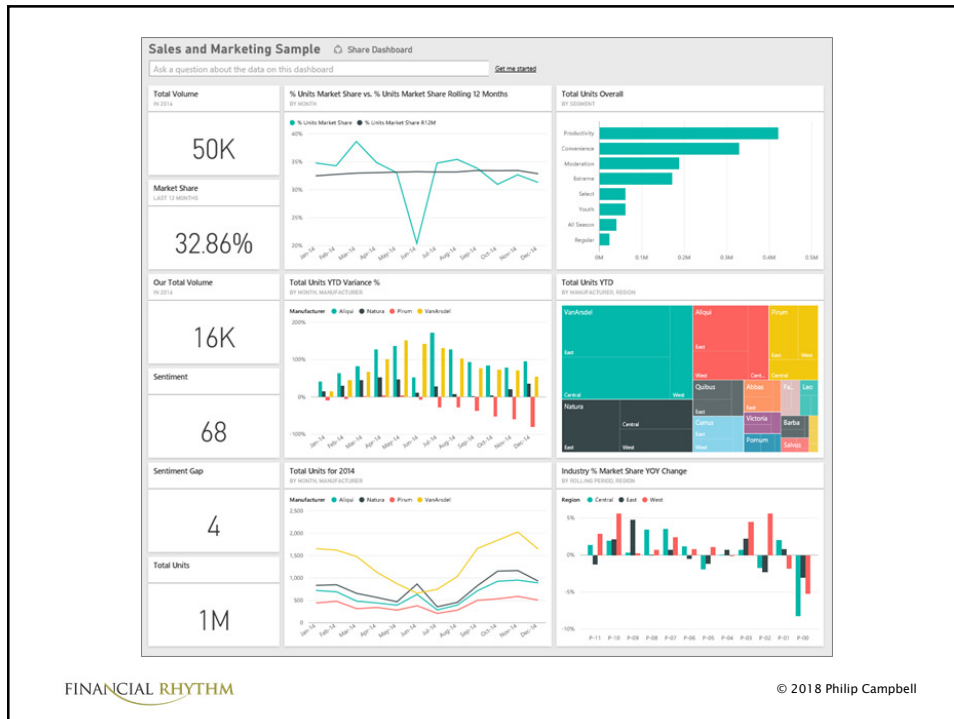
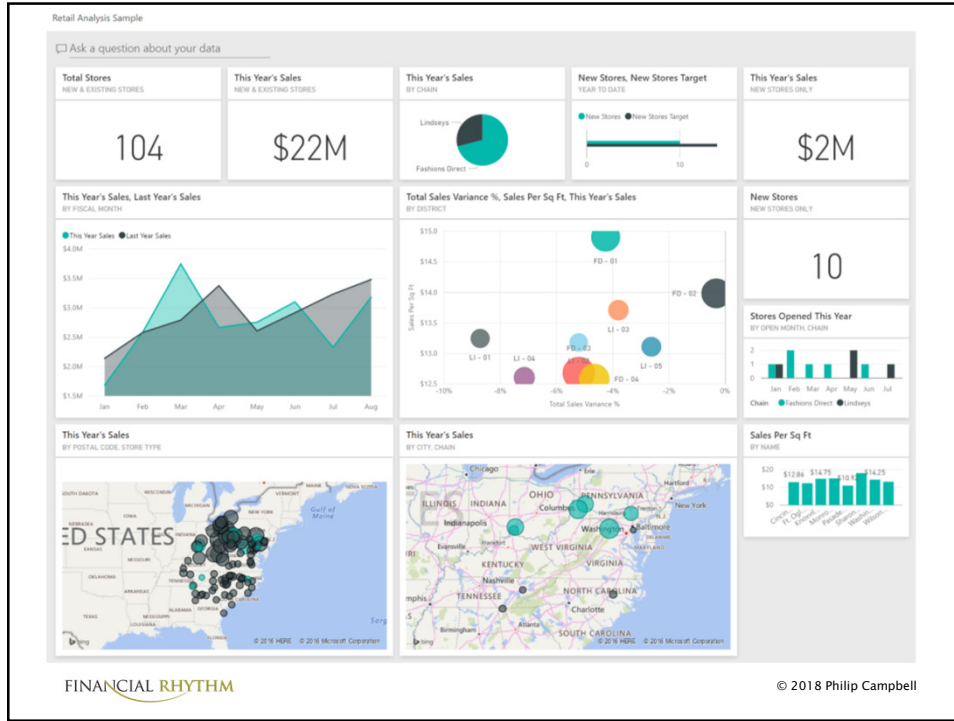


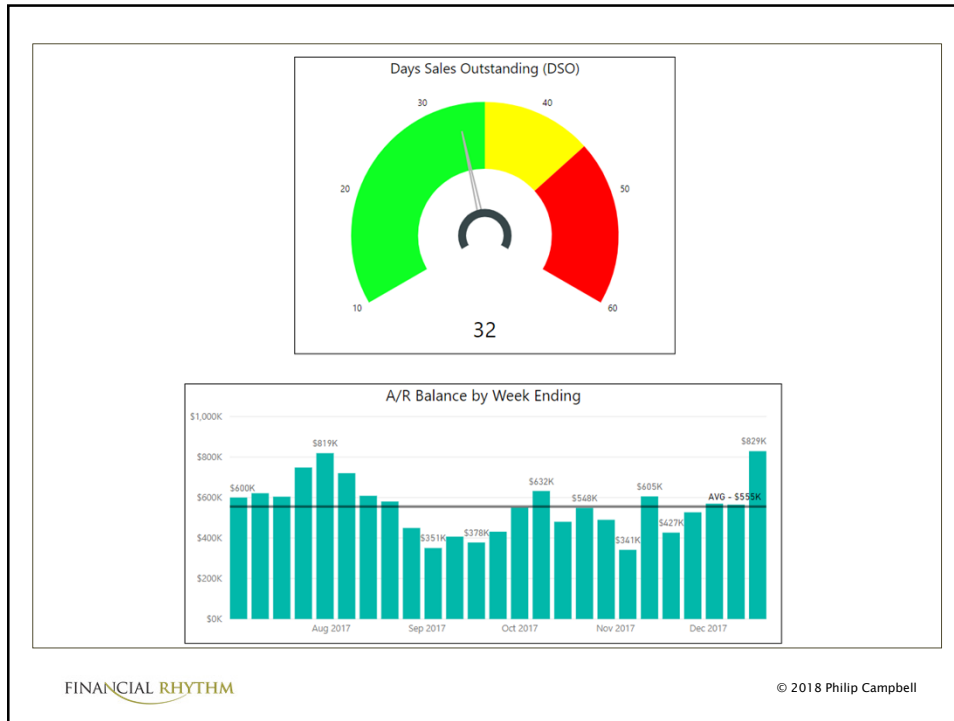
Dashboards

A dashboard is a visual display of the most important information needed to achieve one or more objectives that has been consolidated on a single computer screen so it can be monitored at a glance.

- Stephen Few







The Secret to Adding Value

THE MONTHLY FINANCIAL RHYTHM

Adjust : Action Plans

Monitor : Financial Results

Target : Financial Goals

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TARGET

- Big picture financial GOALS
- 1 to 3 specific financial TARGETS

MONITOR

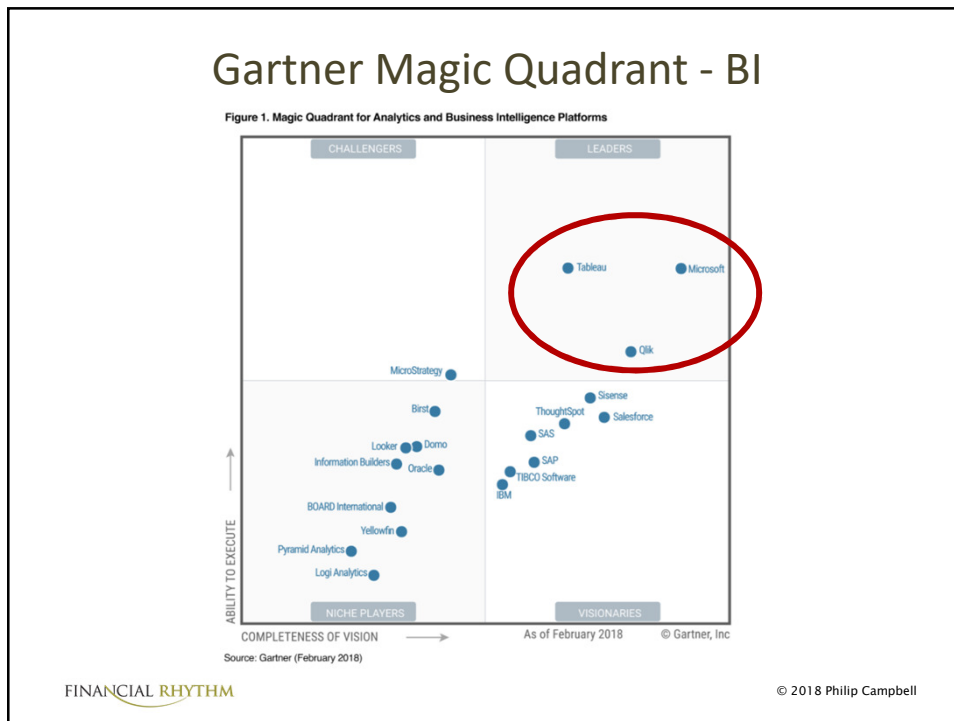
- Actual financial results (“What happened?”). Did we hit the target... a rock... or neither?
- Reliable financial forecast (“What’s about to happen?”) On course to hit the target... or a rock?
- Financial information turned into INSIGHT

ADJUST

- Management reviews financial results and determines which tactics to continue or to change
- Make any necessary course corrections

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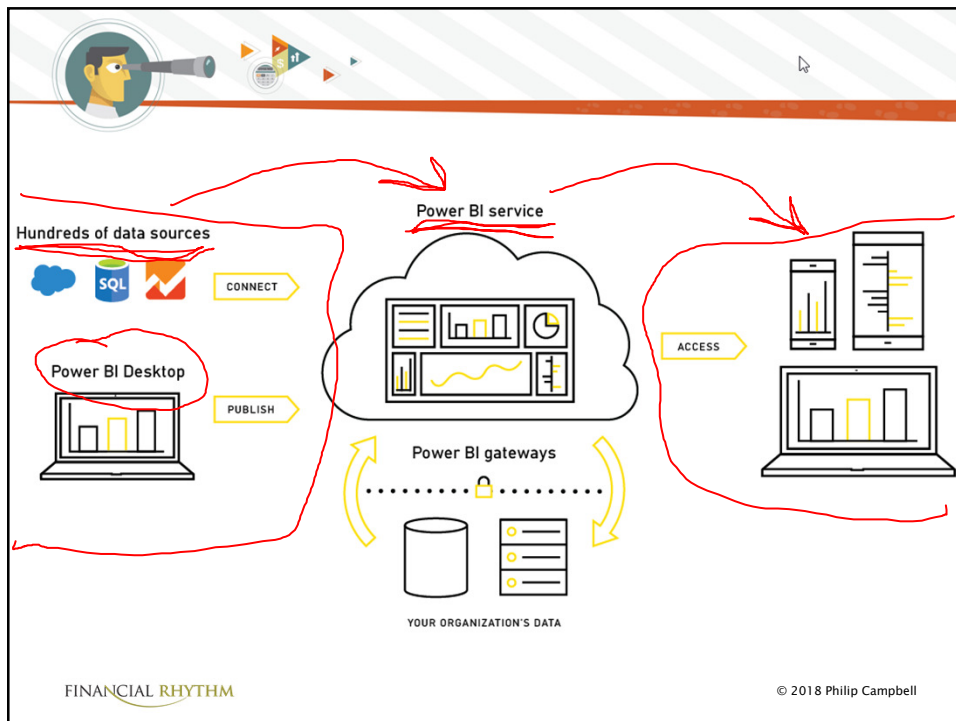


Example Power BI Files

- Weekly focus dashboard
- The FCI cash example
- Synopticpanel Example with store layout
- Zip Code Study Example with maps
- Customer Profitability Sample – Show team scorecard to show filters, change line graph
- Pulse Chart - stock price being “played”
- Help Desk Fort Worth example

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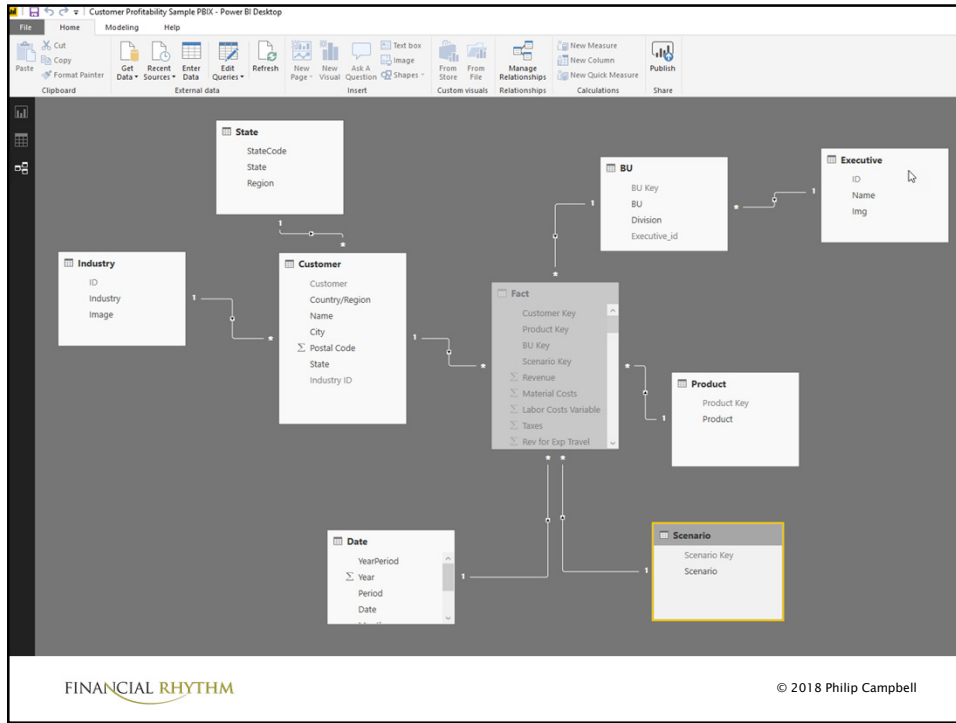
Lots of Data Sources

The image displays two side-by-side screenshots of the 'Get Data' dialog box in Microsoft Power BI. Both windows have a search bar at the top and a list of categories on the left: All, File, Database, Azure, Online Services, and Other. The left window has 'All' selected, showing a list of data sources including Excel, Text/CSV, XML, JSON, Folder, SharePoint folder, SQL Server database, Access database, SQL Server Analysis Services database, Oracle database, IBM DB2 database, IBM Informix database (Beta), IBM Netezza, MySQL database, PostgreSQL database, and Sybase database. The right window has 'Online Services' selected, showing a list of online services including Visual Studio Team Services (Beta), Salesforce Objects, Salesforce Reports, Google Analytics, appFigures (Beta), comScore Digital Analytix (Beta), Dynamics 365 for Customer Insights (Beta), Data.World - Get Dataset (Beta), Facebook, GitHub (Beta), MailChimp (Beta), Marketo (Beta), Mixpanel (Beta), Planview Enterprise (Beta), Projectplace (Beta), and QuickBooks Online (Beta). Both windows have 'Connect' and 'Cancel' buttons at the bottom right.

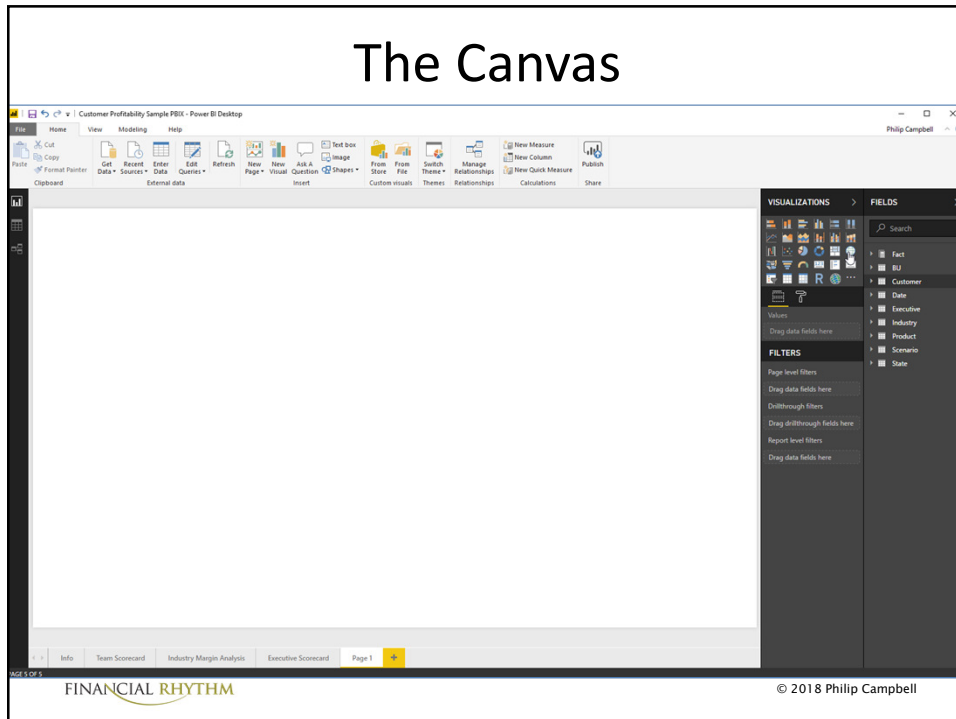
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The image shows the Microsoft Power BI Desktop interface. The title bar reads 'Weekly Focus Report Example - Power BI Desktop'. The ribbon is set to 'Modeling' and includes tabs for 'File', 'Home', 'Modeling', and 'Help'. The 'Modeling' tab is active, showing options like 'Get Data', 'Recent Data', 'Enter Sources', 'Data', 'Edit Queries', 'Refresh', 'New Page', 'New Visual', 'Ask a Question', 'Image', 'Shapes', 'From Store', 'From File', 'Manage Relationships', 'New Measure', 'New Column', and 'New Quick Measure'. The main workspace is dark grey. A context menu is open over a table, with 'PBI Format' selected. The menu items are: Week Ending, Collected, Invoiced, A/R Balance, Bank Balance, Collected Target, AVG Daily Sales, DSO, Invoiced Target, 14W Collected, and 14W Invoiced.

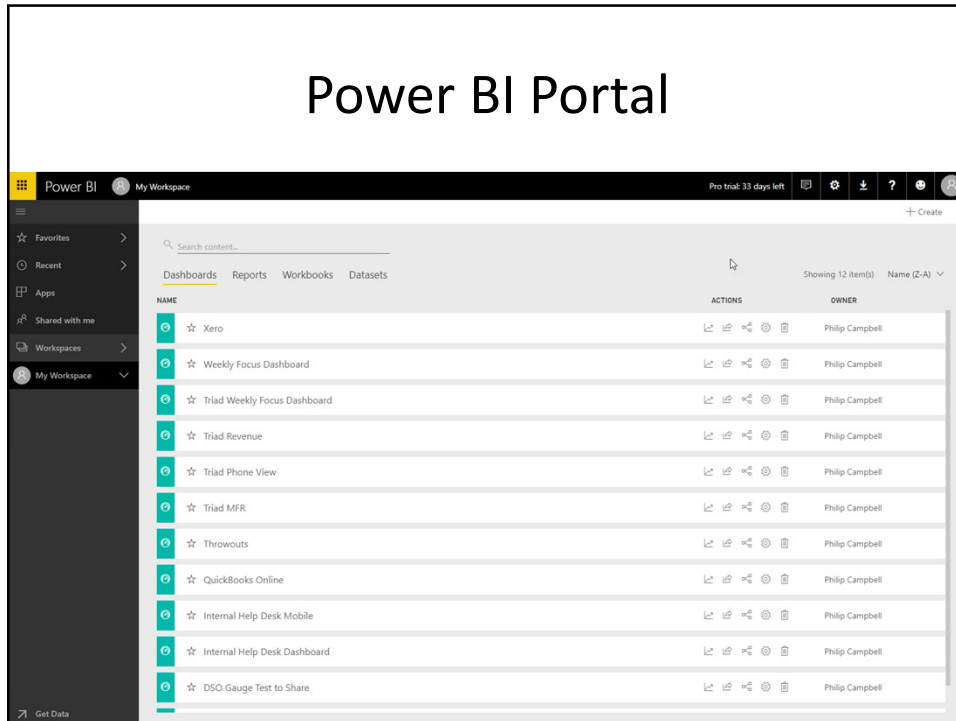
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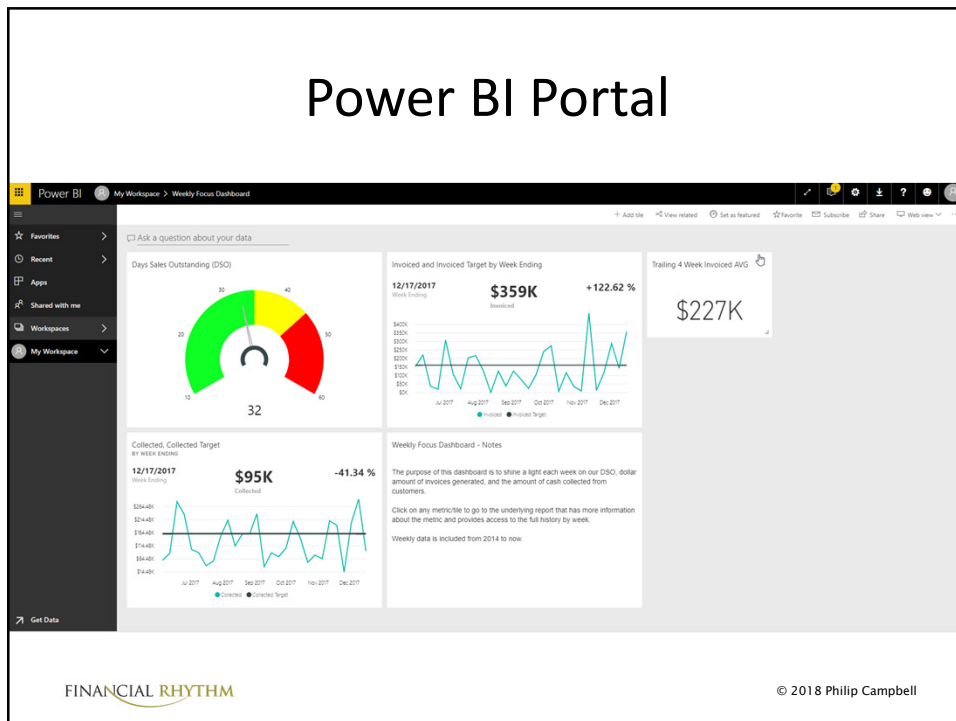
The Canvas



Power BI Portal



Power BI Portal



Create Automated Alerts

The screenshot shows a dashboard with several widgets. A sidebar on the right is open to the 'Manage alerts' section for 'TRAILING 4 WEEK INVOICED AVG'. The sidebar contains the following settings:

- Alert title: Alert for Trailing 4 Week Invoiced AVG
- Active: On
- Set alerts rule for: T4W Invoiced
- Condition: Below
- Threshold: 161250
- Maximum notification frequency: At most every 24 hours
- Alerts are only sent if your data changes.
- Send me email, too:
- Use Microsoft Flow to trigger additional actions:

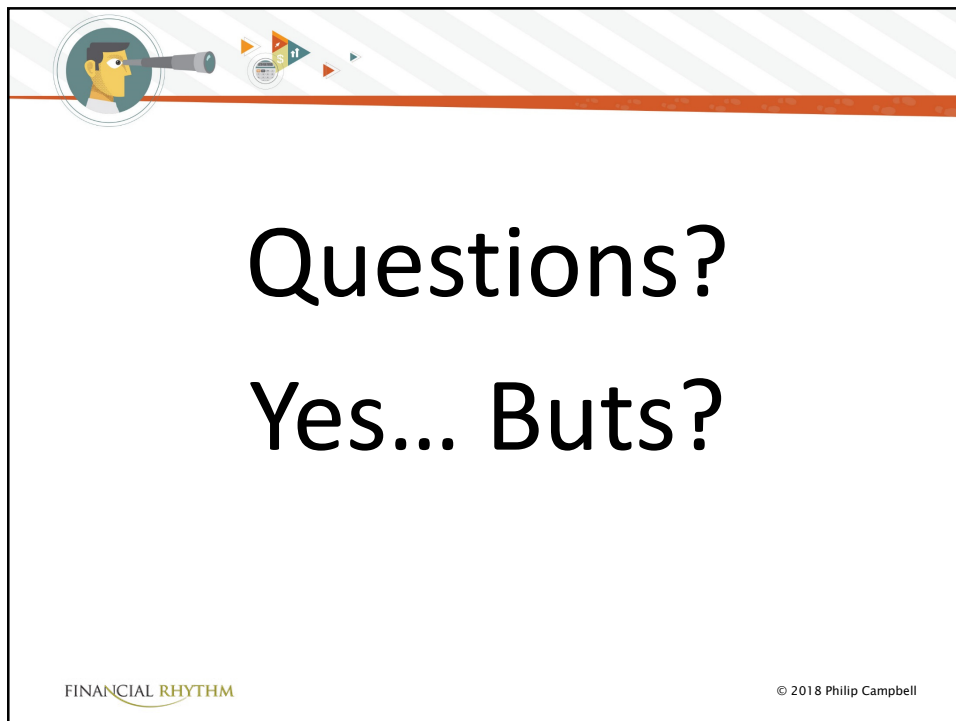
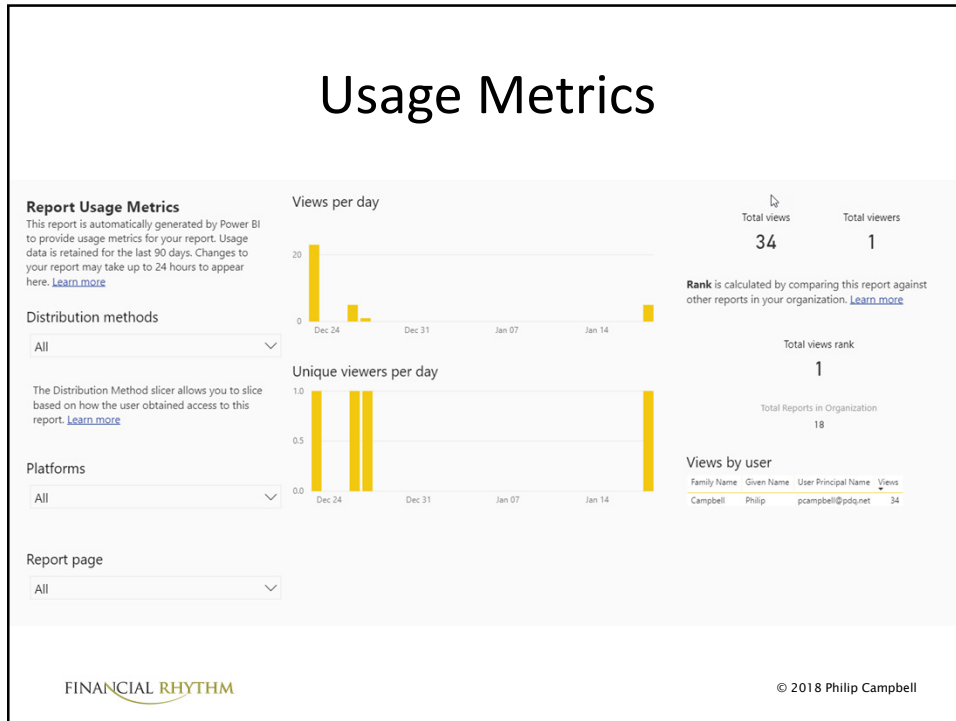
A red arrow points from the 'Trailing 4 Week Invoiced AVG' widget on the dashboard to the 'Manage alerts' sidebar.

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The screenshot shows a mobile phone view of the dashboard. A red circle highlights the 'Edit phone view' button in the top left corner, with a red arrow pointing to it. The phone screen displays a 'Weekly Focus Dashboard' with the following widgets:

- Days Sales Outstanding (DSO): A gauge chart showing a value of 32.
- Invoiced and Invoiced Target by Week Ending: A line chart showing a value of \$359K and a percentage change of +122.62%.
- Collected, Collected Target by Week Ending: A line chart showing a value of \$95K and a percentage change of -41.34%.

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The screenshot shows a Udemy course page for "Powerful Reports and Dashboards with Microsoft Power BI". The course is by Ian Littlejohn, has a 4.5-star rating from 624 reviews, and 3,502 students enrolled. It was last updated in 10/2017. The course is currently on a "Valentine's Day Sale" for \$24.99, a 75% discount from the original price of \$99.99. The page includes a "What Will I Learn?" section with six bullet points, a "Requirements" section, and a "Buy Now" button. The course includes 5.5 hours of on-demand video, 20 articles, 8 supplemental resources, full lifetime access, and a certificate of completion.

Powerful Reports and Dashboards with Microsoft Power BI

Learn to use the free Microsoft Power BI to create reports, analyze data and develop interactive dashboards in minutes

★★★★★ 4.5 (624 ratings) 3,502 students enrolled
Created by Ian Littlejohn Last updated 10/2017 English

What Will I Learn?

- ✓ Create powerful reports and dashboards with Microsoft PowerBI with ease
- ✓ Learn to use the free Microsoft PowerBI to easily ask questions of your data
- ✓ Gain valuable insight and intelligence from your business and marketing data in a fraction of the time of traditional spreadsheets
- ✓ Publish reports and dashboards on the Internet and view using laptops, tablets or smartphones in minutes
- ✓ Easily create a wide range of graphs and visualizations using drag and drop technologies
- ✓ Create a powerful dashboard and Business Intelligence system for free

Requirements

- You will need to know how the basics of working with data in Excel

Includes:

- 5.5 hours on-demand video
- 20 Articles
- 8 Supplemental Resources
- Full lifetime access
- Access on mobile and TV
- Certificate of Completion

Valentine's Day Sale
\$24.99 \$99.99 75% off
4 days left at this price!

Buy Now

Add To Cart

30-Day Money-Back Guarantee

Have a coupon?


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The slide is titled "How to Get Started" and features a list of six steps. The word "YOU" is highlighted in yellow in the first step. The slide includes a decorative header with a magnifying glass icon and a footer with the Financial Rhythm logo and copyright information.

How to Get Started

1. Find one metric that really matters to **YOU**
2. Pick a tool and start your first dashboard
3. Don't ask for any money (or budget)
4. Don't ask for time to work on it
5. Don't ask for permission
6. Create it for your eyes only... at first

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Downloads and Contact Information

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Making History

... not just recording it!



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