digital agent

Unlock Data Independence with Digital Agent's Self-Service BI

In this document you will discover how Digital Agent's Self-Service BI empowers you and your team to independently access, analyze and visualize data with ease without any technical support.

What is Self-Service BI

Digital Agent's Self-Service BI is the capability to help nontechnical business users access, analyze and visualize data without the need to rely on Digital Agent's data specialists. It allows you to create your own reports, dashboards and explore data insights in a user-friendly environment.

Key Features of Self-Service BI

User-Friendly Tools
Customers can create and manage reports and dashboards that they design.

Data Access
Provide access to data sample that has been modeled and made available for consumption from various sources. The data may have been filtered, aggregated, and combined to make it user friendly.

Customization
Users can create and customize their own dashboards and reports, focusing on metrics and KPIs that are most relevant to their specific needs and goals.

Near Real-Time Insights
Data is refreshed every night so you can receive near real-time updates.

Reduced Dependency on IT
Through these easy Self-Service options, you can eliminate dependency on your IT team and liberate them to focus on more complex requirements.

What is the Service?

Digital Agent enables you to get the insights you need when you need it and eliminates the dependency on your IT or data specialist to build the reporting you need. Here is a look at why this is helpful:

Empowerment and Independence
You can access and analyze data on your own, leading to quicker insights and decisions. This independence reduces bottlenecks associated with waiting for IT or data teams to generate reports.

Improved Decision-Making
With direct access to data, customers can perform near real-time analysis and make informed decisions based on up-to-date information. This agility can be crucial in fast-paced business environments.

Customization and Flexibility
Self-Service BI allows a Digital Agent customer to create customized reports and dashboards to their specific needs, making it easier to focus on relevant metrics and KPIs.

Faster Time to Insight
Customers can explore data, test hypotheses, and generate insights faster without waiting for others to prepare data or reports. This speed can provide a competitive edge in rapidly changing markets.

In summary, Self-Service BI is crucial to customers because it enhances their ability to leverage data for better decision-making, saves time and costs, and fosters a data-driven culture within their organization.

FAQs

What Does the Service Include?

Each customer must assign a dedicated BI Analytics specialist from their team who will have access to the Digital Agent Enterprise Analytics solution. This specialist will be responsible for creating and maintaining your analytics tailored to your specific needs. Digital Agent will train them and after successfully completing the required training, the specialist will gain access to the data models utilized within the standard dashboards.
Please note that the Enterprise Analytics solution is designed to provide valuable insights rather than serve as an operational system, meaning not all data will be included within the platform. Our focus is on delivering actionable insights that drive your business forward.

How Does it Work?

Training on creating and maintaining reports and dashboards will be delivered through the Digital Agent Learning Center. As part of the training, participants will gain access to the Enterprise Sample Data Model, allowing them to practice and apply their skills in real-world scenarios.
To ensure proficiency, a final test is required, with a passing score of 100%. Only upon successful completion of the training will the candidate graduate from working on sample data to access the Digital Agent Customer Data Repository, equipping them with the tools needed for effective data management.

How Much Does it Cost?

A customer with more than 250 Websites will be granted access to a seat for a Self-Serve BI at no cost. For additional seats contact the Sales Account Executive.

How Can I Get Started?

Through the Enterprise Marketing Support Portal make the request for access to your client representative.

What Support is Available?

Support will include the training module and data model. For data currently not available a new request can be submitted for assessment / prioritization as a possible Future Enhancement in the product roadmap.

How to select a Digital Agent Self-Service BI Candidate?

Selection of the Self-Serve BI candidate must take into account the following:

- Knowledgeable of the advisor activities with Digital Agent
- Knowledgeable of the Marketing activities with Digital Agent
- Knowledgeable of the current analytics capabilities for Advisors and Enterprise Marketing Dashboards