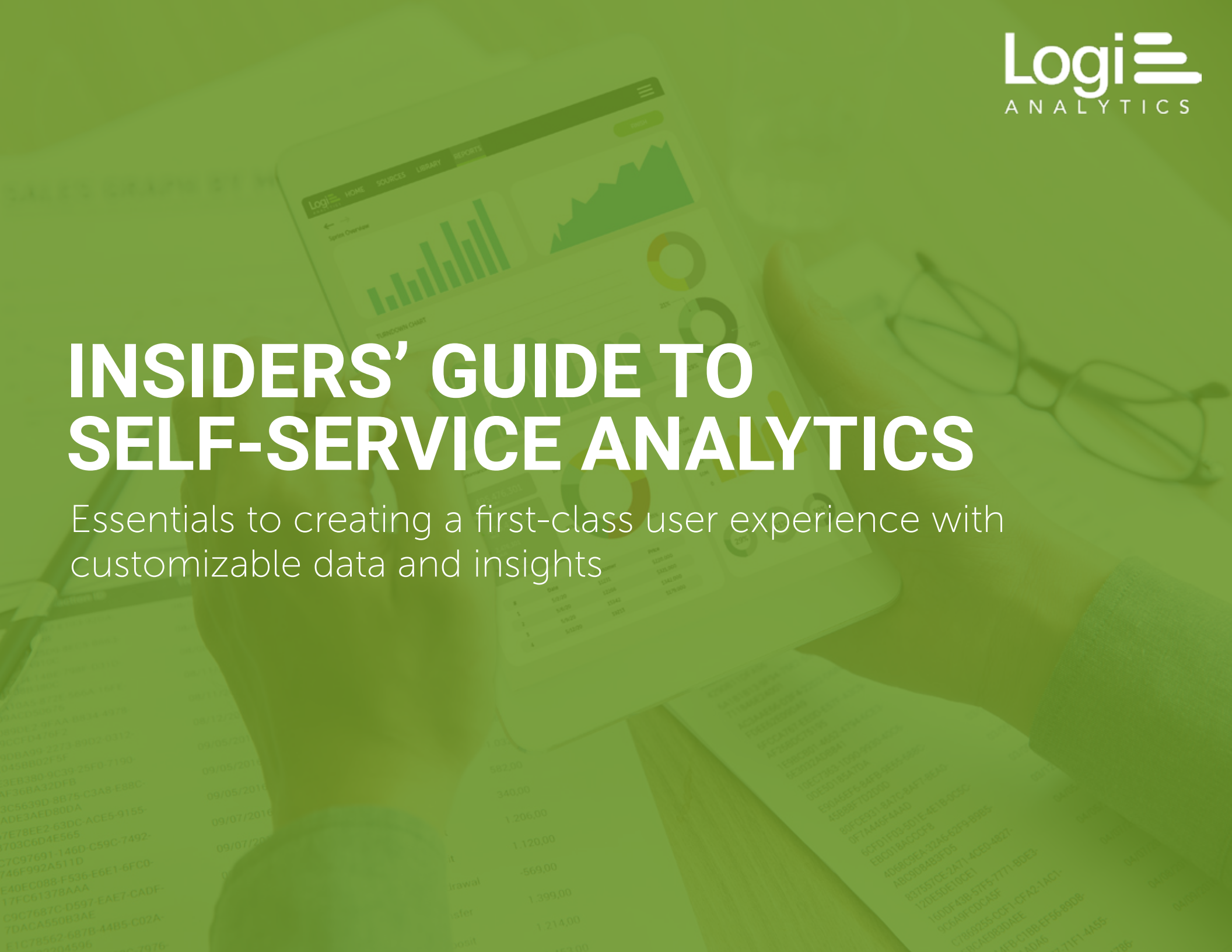
Logi ANALYTICS



INSIDERS' GUIDE TO SELF-SERVICE ANALYTICS

Essentials to creating a first-class user experience with customizable data and insights

TABLE OF CONTENTS

One-size-fits-all self-service isn't what it seems

It's more like one-size-fits-none. For high-performance, data-driven organizations, self-service has evolved as essential to the core analytics capabilities in their applications. But be careful what you pay for when it comes to self-service analytics.

Individual users become overwhelmed by too many self-service functions or frustrated by not having enough of them. It creates a far-from-optimal experience, causing them to leave the application and instead request custom reports that consume development resources. As a result, their organizations risk low-adoption rates, multiple versions of truth, and little control over their data.

However, embedded self-service gives users of all skill levels flexibility, control, and governance over their data, without tying up developer resources. By accessing the exact information they need, tailored to their skill set, users create dynamic insights and reports for better decision-making and greater organizational agility. Embedded self-service yields faster time-to-market, greater user adoption, and a competitive advantage for your organization.

This e-book is for organizational leaders, software teams, and influencers who want to give their end users flexible control over their data with first-class self-service analytics. Keep reading to learn about the "what, why, and how" of self-service analytics. Then, discover how embedded self-service analytics provide a superior user experience in your application for greater adoption rates, happier customers, and a better bottom line.

1 The rise in demand for self-service analytics

Self-service analytics refers to the tools and capabilities users need to run queries and generate reports on their own. The tools are often simplified for ease of use and understanding, without requiring users to have data scientist or data analyst expertise.

When business applications don't supply the analytics and reporting functions that users need, their application teams or users create a workaround. These quick fixes most commonly entail using Microsoft Excel, Google Sheets, or a similar tool. The problem is that many users find these tools difficult to work with, especially when trying to navigate pivot tables and pulling data together from multiple sources. With this analytics experience plaguing so many users, companies, and industries, it's no wonder the need for self-service analytics is on the rise.

Research-based proof

Dresner Advisory Services is a well-known authority on self-service, having studied it since 2012 and featuring it in their annual report *Self-Service Business Intelligence Market Study*. Between 2017 and 2020, most survey respondents have remained steady in indicating self-service business intelligence (BI) as "very important." And, in their 2020 study, 62 percent of the survey sample indicated self-service BI as "critical" or "very important."

In this same study, respondents listed reporting, dashboards, and data integration—all parts of self-service—as the top three most important technologies for BI.

In their *2020 Embedded Business Intelligence Market Study*, Dresner researchers found that 85 percent of respondents agree that embedded BI is "critical" or "very important." In the 2020 webinar, "The Rise of Embedded Self-Service Analytics," Chris Von Simmons of Dresner Advisory Services pointed to research that showed two-thirds of businesses saw a "good" to "very high" return on their BI investments because of self-service.

> *Self-service BI builds upon collaborative BI and user governance to create an environment where users can easily create and share insights in a managed and consistent fashion.*
>
> —Dresner Advisory Services

Dresner's stance on self-service analytics

- **Self-service is a critical objective for embedded BI** because it provides immediate improvements in automating reporting processes and connecting users with the data they need.

- **Self-service is a major contributor to overall success** when combined with:

  - Support from senior management or other BI champions
  - A culture of understanding and valuing fact-based decision-making
  - Good communication and collaboration between those involved with the BI solution

  This success depends on the reliable, trustworthy information that self-service provides in meeting business objectives. It's achieved at greater rates than individuals who don't have access to self-service analytics.

- **Self-service is strategic to organizations of all sizes**, particularly with reporting and dashboards.

Based on their research, Dresner recommends organizations make end-user self-service a significant part of BI application planning. **By prioritizing self-service, their plans will naturally account for the trustworthy data aspect of handling data integration, data warehousing, and data preparation and blending.**

Flexible user experience

Self-service analytics enable users to analyze and report their data in more effective and efficient ways than they ever could before.

Your users gain the ability to:

- View data in a way that makes sense to them, providing better insights.
- Find the answers they need on their own, meaning fewer ad hoc requests for your development team.
- Become more self-sufficient, yielding higher user adoption rates.
- Connect to all the data they need, manipulate it, and derive insights right within the application.
- Complete their analytics and reporting tasks within their workflow, creating greater application stickiness.
- Securely share content and automate content delivery, making the entire organization more data-driven.

The demand for self-service analytics today comes from a mix of decentralized, business-driven approaches at the departmental level and centralized, IT-driven approaches. Collaboration between these areas is helping to fuel the success of self-service in organizations worldwide.

2 A lesson in customizable analytics

One-size-fits-all self-service limits development teams in that they cannot customize analytics for each user. Analytics vendors that offer these types of solutions tend to support the common misconception that the level of flexibility that self-service analytics provide isn't possible without a sacrifice in control. In truth, when partnered with underlying governance, self-service analytics enable organizations to increase—but still control—the type and amount of data that users need, depending on their role and skill set.

78% of users highly value customizable analytics

— 2021 State of Analytics: Users Demand More, Logi Analytics

More specifically, embedded self-service analytics provide greater control over how end users view, interact with, and share information. End users can analyze their data by dynamically modifying, drilling through, or creating their own dashboards and reports. And they can quickly create ad hoc reports in near-real-time, without taxing valuable IT resources to create a multitude of custom report requests. As a result, application teams stay focused on supporting and developing additional features for the core application.

User skills

When evaluating self-service analytics functionalities, think about the skill levels of your users who require data access to perform their work. These levels can vary significantly by job role and data type.

How three users in a security company might use analytics in their jobs:

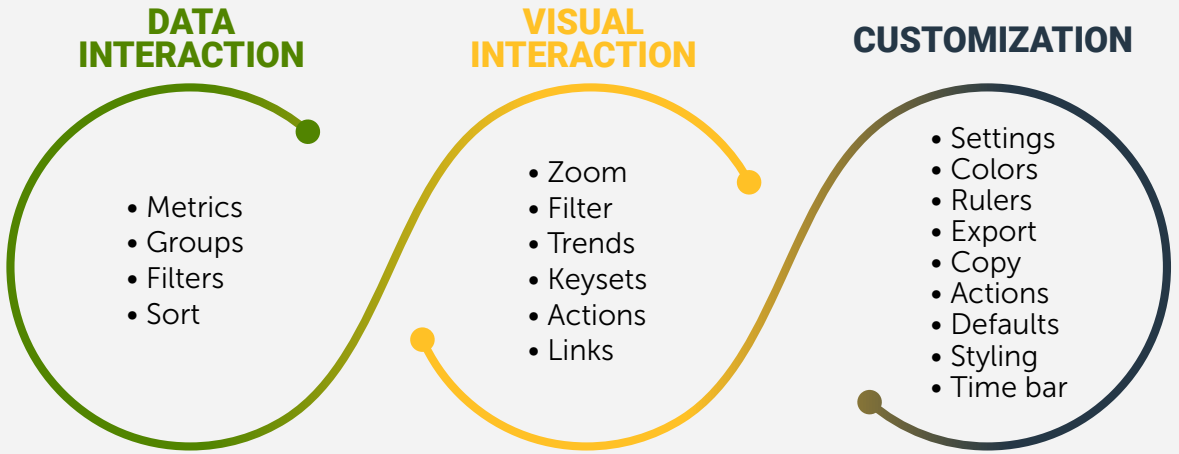
- **Level 1:** A secretary or security guard might have to monitor one to two doors and need access to the badge data of each person who enters and exits their building.
- **Level 2:** Their manager might be responsible for several sites and want to know whether the security staff is responding appropriately to their security alerts.
- **Level 3:** A security director might want to know about major security holes in their buildings. They might need to analyze the data for all site locations to detect trends, determine where to invest in security, or improve their whole security approach.

As this real-life example shows, each level has different needs for data. Your users' skill levels are likely to go well beyond three levels with an even wider range of users. Therefore, it's critical for your analytics solution to accommodate those levels and data needs.

Data and interactivity controls

In addition to skill levels, think about the type or types of controls your users need to create insights and reports for their job. The types vary from data interaction and visual interaction to customization.

3 EASY-TO-USE CONTROLS
OF SELF-SERVICE ANALYTICS



By embedding self-service analytics, your development team can easily gear your solution to provide tighter controls, governance, and security over your data. And your users will have a customized experience that enables them to successfully perform their jobs.

> *Intuitive self-service [is an] alternative to other complex reporting solutions that gives our customers more flexibility and agility in their daily work while significantly increasing the value of our products.*
>
> — Mukesh Marodia, Principal Product Manager, Informatica

4 First-class self-service with embedded analytics

To give your users a first-class self-service analytics experience, embed them right in your application. Embedded analytics give your users, developers, and business increased value and control that no other solution provides.

Happier, more confident end users

Your application teams tailor and configure embedded self-service to match the skill level of your end users, enabling them to optimally modify and share their own visualizations.

Your end users get:

- Customized and secure access to self-service and dashboard features for their role.
- Reduced learning curves so they can more intuitively work with the data they need to succeed in their jobs.
- Access to the necessary data and reporting functions for more in-depth analysis and greater insights.
- The ability to visually create analytic content and perform ad hoc analysis all within the application.
- The freedom to securely collaborate and share content on demand or with automated scheduled delivery.

From a user standpoint, working with embedded analytics that are tailored to their skill level gives them greater confidence to work with the data they need. And they get more accurate information and insights in return.

Efficient use of developer resources

Today's application users won't settle for bare-minimum or disconnected analytics. They're less likely to use standalone self-service solutions on a regular basis when they have to switch from your application to a separate analytics tool. Jumping back and forth between separate applications results in a disconnected experience, inefficient workflow, and potential security risks.

With embedded self-service analytics, your application developers experience:

- **Significant savings in resources and time needed to set up and maintain the analytics application.**
- **More time to focus on adding features to and supporting the core business application.**
- **The ability to set end-user data access and governance to ensure a secure discovery experience.**
- **The capacity to define levels of end-user self-service and dashboard interactivity at the feature level.**
- **Simple user configuration with easy-to-use controls to customize analytics and reporting capabilities for each user or by role.**

This experience is a tremendous win for your developers. They stay focused on their core responsibilities by providing users with the self-sufficiency they need to analyze their data and customize reports on their own.

New business insights and value

Beyond the benefits of self-service analytics for your users and developers, embedding them into your application means significant value for your bottom line.

Your business achieves:

- **Automated reporting processes, making it easier for your company and its infrastructure to scale as they grow.**
- **Greater user adoption because of better engagement with the application and a positive experience, reducing customer churn.**
- **Self-sufficient and confident users who are connected to the data and the reporting and analysis capabilities they need to be successful in their roles.**
- **Faster time to market by investing in an embedded analytics solution instead of tying up significant time and money over building and maintaining an alternative solution.**
- **Product differentiation, as well as new licensing and product sales opportunities that aren't otherwise possible.**

In addition to the advantages of embedding analytics with self-service capabilities, your company gains a competitive advantage, resulting in a greater overall return on your investment.

5 Key benefits of embedded self-service analytics

USERS

- Customized analytics and reporting features by role
- Reduced learning curves due to an intuitive interface
- In-depth analysis and insights at their fingertips
- Visual content creation and reporting
- On-demand and scheduled content delivery

DEVELOPERS

- Fewer ad hoc reports for a significant savings in resources
- Greater focus on the core business application
- Simplified user configuration process
- Customizable dashboard features for end users
- More secure data access and governance

BUSINESS

- Automated analytics and reporting process
- Greater user adoption, reducing customer churn
- Self-sufficient and confident users
- Faster time to market
- Product differentiation and potential sales opportunities

Start your embedded analytics journey

To deliver the self-service capabilities that your users are seeking, partner with the leader in embedded analytics—Logi Analytics. The Logi Analytics solution delivers:

- A **superior user experience** with the broadest set of intuitive developer-grade embedded analytics solutions.
- An **accelerated product roadmap** thanks to our dedicated team of application experts who provide comprehensive enablement services and ongoing support.
- **Reduced development costs and standardized development** by leveraging your existing investments and infrastructure.
- **Exclusive focus on embedded analytics** and application teams.
- **Simple and unlimited customization** for complete control over application branding.
- The ability to use **existing security controls, database schemas, and architecture** in any deployment environment.

When you partner with Logi Analytics for your self-service analytics solution, you give your application teams and users automated reporting and process efficiencies that alternative solutions can't provide. You reduce development costs, accelerate application time-to-market, and create happier customers. All the while, you keep your business focused on your core mission.

See why Logi Analytics is your first choice for self-service analytics. Try our self-service analytics for yourself, and see real data visualizations in action.

SHOW ME DATA IN ACTION

Logi ANALYTICS