

alteryx

E-BOOK

The Analytics Leader's Guide to Automating Analytical Business Processes



Introduction

When analytics teams struggle to keep up with demand for reports and insights, it's often because they don't have the resources they need.

Shortages in talent, budget constraints, and manual processes all get in the way of teams providing their best work.

These challenges are why analytics leaders turn to automation.

Automating analytics business processes is one of the best ways to deliver immediate impact without increasing spend or team size. Leaders can use automation to meet their organization's demands using their current teams and infrastructure while providing added value.

While you can use automation for almost any process, we're going to focus on four specific use cases that will have the most significant impact on your company.

For this, we will briefly look at how you can use automation as part of your data strategy to:

- 01** Eliminate Manual Analytics Processes
- 02** Meet the Demands for Analytics and Insights
- 03** Bring Analytics to Everyone
- 04** Address Talent Shortages and Data Literacy

Let's dive in.



01

Eliminate Manual Analytics Processes

Getting rid of the time-consuming manual processes that plague your team makes both your team and your organization more efficient.

Rather than repeating processes week after week, automation allows you to build a process once and then monitor it. The time that used to be spent rebuilding the same reports can now be used to create value.

Businesses using analytics automation to remove manual work can see major time savings and reduce costs.

JPMorgan Chase & Co. automated the process of pulling records after adopting a JIRA Connector. The multinational financial services firm aligned the connector to their cloud environment and [saved 10-20 hours per week](#).

To get the biggest benefit from automation, seek out tools that provide automated workflow documentation. This feature will reduce the time it takes people to understand how a workflow was used, speeding up the reporting and auditing process, too.

02

Meet the Demands for Analytics and Insights

Automation can also help you keep up with the never-ending requests for reports and dashboards.

Advanced tools can automate the generation of insights using the data you provide. AI can analyze the data, surface insights, and even turn them into emails and presentations using language anyone can understand.

Organizations that use automation for this purpose report marked improvements in reporting speed, accuracy, operational efficiency, and revenue. Users are also able to self-serve more insights without requesting a full dashboard from the analytics team.

When Kingfisher plc used [automation to provide insights people could use to get answers to questions](#), they were able to keep up with demand — and provide added value with AI insights.

To achieve these same results, focus on platforms that use AI within a trusted environment and use intuitive UIs made for people with varying levels of technological experience.

AI to the Rescue

AI can help automate analytics processes more easily. Just be sure to use a solution with integrated governance and security.

Automate Insights: Generative AI can create summaries of insights in natural language and then automatically format the data into presentations, emails, and other communications formats.

Explain Why: AI can analyze your data to discover anomalies and patterns that explain the trends you see in your data.

Digitize Documents: AI can convert text, print, and images into formats for performing analysis or archiving analog records.

Document Workflows: Generative AI can document and provide concise summaries of workflows as people create them.

Increase Transparency: Generative AI can assist with creating consistent and accurate outputs that ensure analytics processes are auditable.

03

Address Talent Shortages and Data Literacy

If your analytics department faces talent shortages, you can use analytics automation to address those. Much of the pressure analytics teams face comes from the varying levels of technical knowledge of business users, who often know only enough to perform basic analysis.

Deploying self-service analytics tools gives non-technical staff the resources they need to perform advanced analysis, reducing the reliance on specialized data analysts or data scientists and bridges the talent gap.

Organizations leveraging analytics automation in these areas have witnessed a broadening of data literacy across their workforce, leading to a more informed and agile organizational culture.

After creating a center of enablement built on analytics automation, Phillips 66 generated over 1,500 use cases that [saved the multinational energy company over 40,000 hours and generated \\$10 million](#) in value.

To see a similar benefit, use analytics tools that require minimal technical expertise, like a no-code platform. These features will enable more employees to engage with and understand data.

04

Bring Analytics to Everyone

When you have tools that anyone can use, you can increase the use of analytics throughout your organization.

Giving people the ability to prepare and analyze their own (governed) data, or the ability to build their own machine learning models, allows them to get immediate answers, speeds up results, and leads to good decisions.

Providing accessible tools empowers widespread adoption of analytics across your organization and as a result your business will benefit from faster decision-making and more accurate insights. In fact, companies that use automation as part of their decision-making process report reduced errors and better results.

IQVIA used automation to standardize data and reduce the delivery time of patient data for clinical trials. The multinational company shortened the process from 1-2 months to 1-2 days and [saved \\$1.2 million annually](#).

You can increase your analytics efficiency using solutions that automate data analysis, streamline data flow, and provide near real-time analytics capabilities.

Conclusion

Analytics automation can transform almost any business process. It can help meet organizational demands for analytics and insights without increasing budgets and can empower non-technical employees to work with data.

To see how you can use automation to meet your goals this year, check out [The AI Platform for Enterprise Analytics](#).



Ten More Ways to Automate Analytics Business Processes

Here are 10 more practical use cases where automation can help you drive innovation across the organization.

1. Automate gathering and interpreting telemetry data into internal operational processes (product, sales, marketing, etc.) to increase data accuracy and uptime.
2. Automate the user access control process to ensure that only authorized personnel have access to critical data, reducing the risk of data breaches and associated costs.
3. Automate ticket escalation processes to minimize downtime and reduce the impact of IT incidents on the business.
4. Automate the collection and analysis of data from various sources such as helpdesk tickets, resource utilization reports, and staff schedules.
5. Automate lead routing from marketing to sales to increase revenue operations.
6. Use automation to merge survey data with enriched data sources that contain information about the respondents and their respective companies.
7. Automate advanced audience segmentation to speed up your targeted outreach.
8. Automate expense allocation processes to minimize the risk of errors and reduce manual tasks.
9. Automatically match and reconcile financial data across different systems, reducing manual effort.
10. Automate financial reconciliation reports to save time and financial resources.



About Alteryx

Alteryx (NYSE: AYX) powers actionable insights with the AI Platform for Enterprise Analytics. With Alteryx, organizations can drive smarter, faster decisions with a secure platform deployable in on-prem, hybrid, and cloud environments. More than 8,000 customers globally rely on Alteryx to automate analytics to improve revenue performance, manage costs, and mitigate risks across their organizations. To learn more, visit www.alteryx.com.

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