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EVENT

More Dashboards Won't Solve Your Data Problems, but Auto Insights Can

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Learning from the Past



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Auto Insights



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Use Cases



3

Current Dashboarding
Frustrations



6

Demo

1. Introductions



Treyson Marks

Managing Partner
DCG Analytics

- Graduated University of Central Oklahoma, Economics
- Alteryx ACE
- 10 Years Analytics Consultant
- Started DCG Analytics in 2024
- Located in OK w/my wife and 2 children

1. Learning from the Past: How Analytics has Changed how we Work

There is a history of organizations rushing to adopt new technologies, overshooting, and then rolling back.



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2. AI in the Workplace: A Turning Point

Another Seismic shift in how decisions are made and work gets done.

“30% of Microsoft’s code is now written by AI.”

— Microsoft CEO Satya Nadella

Source: NY Post, Apr 30, 2025

“AI tools helped drive a 20% increase in wealth management sales.”

— JPMorgan Chase

Source: Reuters, May 5, 2025

“Generative AI tools boosted productivity by 66% across realistic tasks.”

— Nielsen Norman Group

Source: NNGroup.com, 2024

2. AI in the Workplace: Examples of Workplace Acceleration

Forecasting demand with higher accuracy by using historical data + external variables (e.g., weather, economic indicators).

Customer support teams using AI to predict escalations before they happen.

Financial analysts getting “insight digests” every morning summarizing the biggest changes in KPIs.

2. AI in the Workplace: Where We Should Be Careful

Hallucinations & Misleading Output: AI can surface wrong insights if the underlying data is poor or prompts are vague.

Over-Reliance: Automating insights doesn't eliminate the need for context, domain knowledge, or skepticism.

Data Quality is Still King: Garbage in, garbage out — AI can't fix foundational data issues.

Transparency & Explainability: Business users must trust how AI arrived at its conclusions.

Bias Amplification: If historical data reflects biases, AI may reinforce them.

2. AI in the Workplace: The Promise of AI in Analytics & Reporting

Speed to Insight: AI can parse millions of rows in seconds to surface relevant trends, without needing pre-built queries.

Reduced Cognitive Load: Analysts don't have to sift through data manually to find "what changed" or "why it changed."

Personalized Storytelling: Tools like Auto Insights automatically generate narratives tailored to specific users.

Democratization: AI lowers the technical barrier, empowering non-technical users to extract insights confidently.

2. AI in the Workplace: The Human + AI Partnership

AI is not replacing analysts — it's augmenting them.

The real power is when AI handles repetitive analysis, and humans focus on judgment, storytelling, and action.

We move from *building dashboards* to *asking better questions*.

3. Current Dashboarding Frustrations: Too Many Dashboards

When this new technology becomes widely available to an organization, it's very easy to build without a strategy for what to build.



3. Current Dashboarding Frustrations: Ineffective Dashboards

Without an effective storytelling approach to dashboarding, it's easy to create ineffective dashboarding



3. Current Dashboarding Frustrations: Long Development Timelines

The back and forth between requirements gathering, building, and feedback, creates a



3. Current Dashboarding Frustrations : Telling a Story We Already Know.

It's difficult to build an effective dashboard that tells the story at every level of the data.

We don't know what we don't know.



4. **Auto Insights:** Bringing AI and Dashboarding Together

Where most BI teams are.



- Historical performance is **summarized**
- Metrics & KPIs are **determined**
- **Reports, Visualizations & Dashboards**

What Happened?

Where the business expects us to be.



- Historical performance is **explained & contextualized**
- **Drivers** for Metrics & KPIs are established
- **Root Cause Explanations** are delivered

Why did it happen?

5. Use Case:

A marketing firm whose offering focuses on their ability to quickly sift through what is happening on any given campaign and adjust quickly.

Live data is constantly being monitored.

Speed to Insights is the name of the game. Long periods for turnover of analysis can cost millions in marketing dollars spent focusing on ineffective campaigns.

Disparate campaign data and structure.

Expensive skillset

5. Use Case: Where Auto Insights Helps

Auto Insights does not require a specific data structure

New data sets can be quickly fed in and turned into insights within minutes

AI driven dashboarding and reporting provides quick answers to ineffective campaign areas

Magic documents helps to quickly build responses to the client.

5. Use Case: Why Analysts Remain Important.

Auto Insights is often not the entire solution, but an accelerator towards insights that may require a specific dive into the data.

Marketing Analysts are given a head start towards providing specific guidance for their clients.

6. Demo

Key Takeaways



1. Effective BI is a lot of work

An effective BI strategy is paramount.



2. Effective Dashboarding > More Dashboards

Work smarter, not harder



3. Auto Insights Speeds up Analytics

Auto Insights allows users at all levels of the business to dive into data without BI experience.



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Stop by the Horizon-Five booth and share your biggest automation challenge. For every conversation, we'll donate \$5 to The Jimmy Fund to support cancer research and patient care.



The
Jimmy Fund®

The Jimmy Fund: Fighting Cancer with Compassion and Innovation

Since 1948, The Jimmy Fund has supported Dana-Farber Cancer Institute's world-renowned research and patient care

Rooted in hope, healing, and progress, the Jimmy Fund engages communities and businesses to help fund life-saving breakthroughs.

Every dollar raised brings us closer to a world without cancer.

alteryx

Thank you!

Agenda



1

Who are these Joe-Shmo's?



2

What could go wrong?



3

Your foundation is always compliance



4

Solving compliance with server and AI



5

Enhancing workflows with AI



6

Key Takeaways

2. What could go wrong? Key Issues:

Do you have a risk based compliance approach to assessing and governing workflows?

If not, every workflow may get audited the same, potentially reducing audit efficiency! Yikes!

Is AI now performing the majority process, or as an add-on to an already well established workflow or process?

In not, heavy reliance on AI could result in inaccurate results without proper governance and controls/process built around it.

Do you have the proper environment including Alteryx Server to be SOX compliant?

In not, managing desktop workflows may become challenging and require a ton of extra documentation and process to keep compliant.

Do you have a system driven process to manage access and changes, aka ITGCs? Are you developing workflows using well defined SDLC procedures?

If not, auditors may substantively audit your workflows, perform sampling at a much higher frequency, and drive up your compliance costs and give your controller a heart attack!

3. A foundation of compliance

Program and Governance

Program management and Governance structure (and training on it!)

Framework to determine level of workflow risk and level of compliance required

Documented SOPs

Project intake process to identify proper fit for Alteryx

Approved AI tools

Guardrails and guidance on AI use

Internal Controls

Risk and Control Matrix

Properly set up **Alteryx Server environment** with things like:

- Access Management
 - Users
 - Groups
 - Data sources

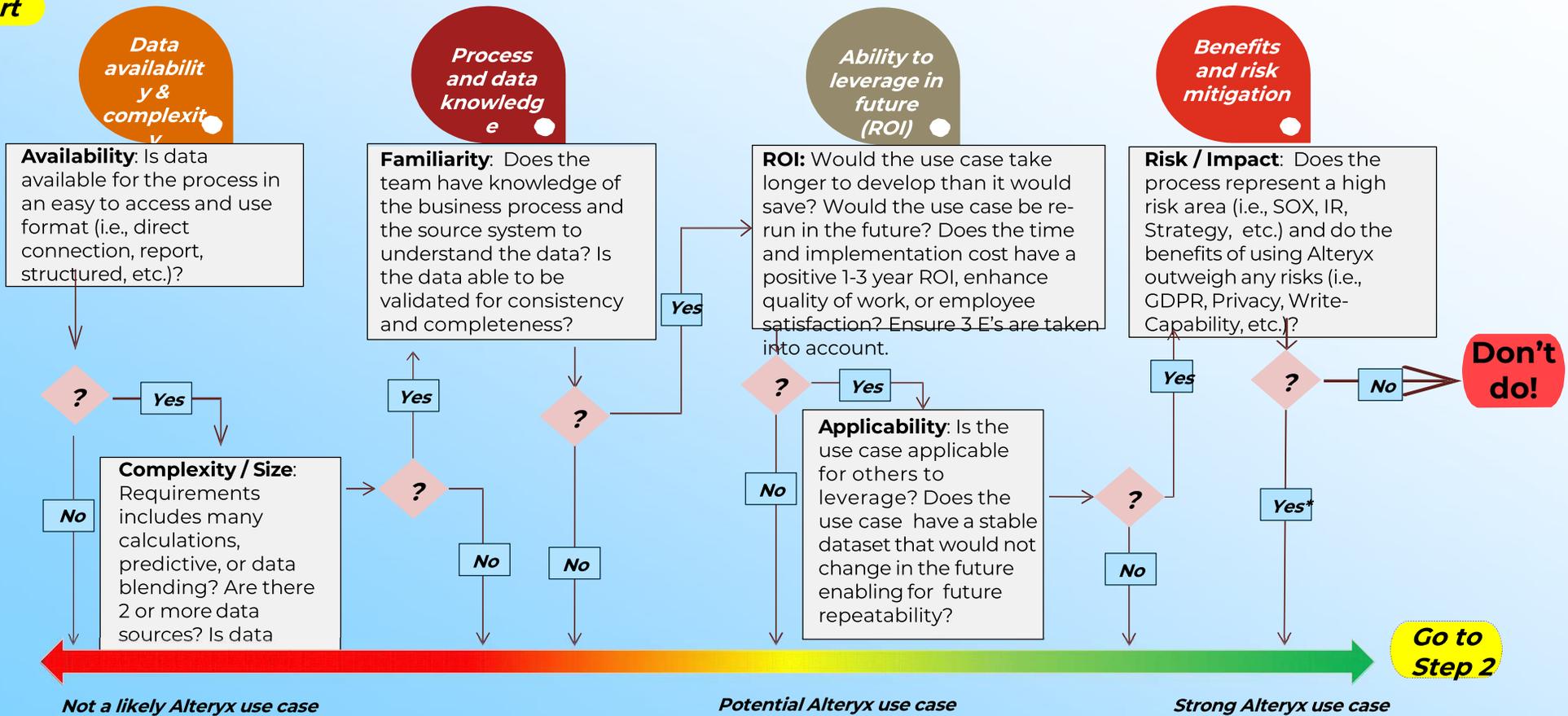
Other ITGCs

Properly designed workflows and change management process

Risk Based Framework

Step 1 – Is Alteryx the right fit?

Start



Risk Based Framework

Step 2 – Risk tier decision tree

Start

Use Case has PII Data

Use Case is related to SOX

Use Case Writes to DB

Use Case is Non-SOX and/or Direct Connects

PII: Does the use case consume and process PII data?

SOX: Does the use case automate or support a SOX process?

Write Capability: Does the use case write back to a database to create or modify data?

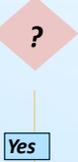
Regulation/Data: Use case is for Compliance/External Reporting purposes and/or uses has direct connection to extract data from transactional systems?



Automating SOX: Does the use case automate a SOX process?

Supporting SOX: Does the use case support a SOX process?

Internal/Data: Use case is for Compliance/External Reporting purposes and/or uses has direct connection to extract data from reporting systems?



Tier 1
Intake Form Required

Approvals Required	
Functional / Digital Lead	GPO and Local Compliance contact*
Data Privacy*	System Owner

Tier 2
Intake Form Required for SOX and Compliance, otherwise Optional

Approvals Required	
Functional / Digital Lead	System Owner and Local Compliance

Tier 3
Intake Form Optional

Approvals Required	Approvals Optional
System Owner	Functional / Digital Lead

6. Enhancing Workflows with AI

AI is incredibly powerful and even more powerful as an add-on to your already awesome SOX workflows.

Demo 3

Foundation Logic Prior to AI

Alteryx accruals automation used logic to identify potential invoices and estimates to accrue for:

- Key estimates from stakeholders / project managers / vendors
- Invoices received after AP close
- Calculated monthly run rates on vendors with Open Pos
- Analysis of forecasted amounts by vendor

Foundation Logic + Plus AI

OCR tools with AI used to scrape all invoices received in PO/Payment Systems

Alteryx workflow with AI then reviews scraped invoice detail and extracts service period of expense activity (if exists) – this type of review could take a human an incredible amount of time during close that they just don't frankly have

Alteryx then leverages service period dates and updates Alteryx recommended accrual and flags in supporting workbook the items that are AI driven

Key Compliance Tips

- Again, AI serves as a great add-on that can enhance your Accounting workflows for more accurate financial reporting!
- Make sure that there is some sort of review process where AI is used where the humans in the loop are checking the accuracy of AI processes.
- Always keep your lines of defense (i.e., compliance, internal/external audit) aligned and comfortable

Key Takeaways

- 1) There's little downside risk to compliance: Governance, Controls, and Program Management
- 2) Leveraging a risk based approach in your compliance frameworks can create efficiencies – Not every workflow should be treated the same!
- 3) Leveraging Alteryx Server with the proper controls can reduce financial risk while also providing scalability. Server APIs create a lot of opportunity for that rigor that our auditors want to see!
- 4) Rebuilding for AI may not give you a great ROI alone plus could create increased risks since much of AI is still in beta, build on top of good and most likely compliant process and leverage AI as add-on
- 5) Ensure proper governance is set up around AI such as specific reviews targeting AI processes
- 6) Always align with your lines of defense on your AI strategy especially when it relates to financial reporting and SOX. Ultimately, everyone has the same goal, and that's integrity of the financial statements!

Alteryx Server – Compliant Capable



SOX Compliant Capable

Prepare for your audit with SOX-compliant automation. Alteryx Server ensures audit-ready workflows with centralized control over data, user access, and execution—meeting regulatory requirements seamlessly.



Stability & Reliability

A cloud-based, always-available solution that minimizes downtime. Service accounts maintain stable data connections, preventing disruptions when team members change roles.



Automated Scheduling

Streamline accounting with scheduled workflows for reconciliations, journal entries, and data consolidation—reducing manual effort, errors, and closing time.



Centralized Governance & Collaboration

Manage workflows securely with role-based access control. Alteryx Server enhances teamwork, allowing seamless workflow sharing and review as you scale.



Scalability for Growth

Easily handle increasing financial data as you expand. Alteryx Server scales with your needs, ensuring high performance for reporting, compliance, and audits.