AI-DRIVEN BI IMPACT BOOK 2026

AI-Driven BI for Every Business Function

How KPI Partners turns governed Business Intelligence (BI) and dashboards into trusted, plain-language answers for function leaders, with three delivered cases in point from Finance, Marketing and Sales.

AT A GLANCE

3	functions served: Finance, Marketing, Sales
3	platforms: Microsoft Fabric, Databricks, Snowflake
99%+	accurate responses in plain English
43	governed marketing Key Performance Indicators across 3 personas

WHAT CLIENTS GAIN

- One conversational way to explain any number, down to the source evidence
- The same number in every dashboard and every AI answer
- Answers where people already work: Teams, Power BI and Excel
- Function-specific AI for any function, pre-built or custom-built

INSIDE THIS DOCUMENT

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AI-driven BI
Dashboards stay and become conversations, on AI-ready foundations

02
Function-specific AI
Any function, pre-built or custom-built with DomainIQ Agents

03
Why KPI Partners
The accelerators behind three delivered cases in point

From drilling down to asking through

Dashboards answer the questions someone planned for. AI-driven BI answers the question a function leader asks today, in plain language, across every system behind the number, with the evidence attached. KPI Partners delivers it with a set of accelerators, led by Dialog with Data for conversational BI and DomainIQ Agents for function-specific AI.

	DASHBOARD DRILL-DOWN	AI-DRIVEN BI WITH KPI PARTNERS
How you reach the answer	A path fixed when the report was designed	The path follows the question, step by step
How far it reaches	One report, one system at a time	Across systems: consolidation, ledger, subledger, source document
Language	Report fields and filters	The business's own terms, synonyms and definitions
What you receive	A chart to interpret	An answer, the driver behind it and the evidence
Trust	A certified dataset	Certified definitions, with AI answers tested and traceable to source

WHAT AI-READY MEANS IN DELIVERY

Each case in point was built on these four foundations

01
Governed, reconciled data
Quality checks and reconciliations built into the pipelines

02
One definition per number
A shared semantic layer every dashboard and AI answer uses

03
Business meaning for AI
Definitions, synonyms, ontology and verified answers

04
Answers you can trust
Tested, secured by role and traceable to source

THREE DELIVERED CASES IN POINT

CASE IN POINT 01 | FINANCE

Finance explains any number in one conversation, from consolidated balance to source invoice

Microsoft Fabric, Fabric Data Agents, Copilot

CASE IN POINT 02 | MARKETING

One governed, AI-ready source proves marketing's pipeline and revenue impact

Databricks, Databricks Genie, Power BI Copilot

CASE IN POINT 03 | FINANCE AND SALES

99%+ accurate plain-English answers from Snowflake, right where users work

Snowflake, Azure OpenAI, Microsoft Teams

Dashboards stay. Everything else becomes a conversation.

KPI Partners' AI-driven BI offering does not replace the dashboards a function relies on. It modernizes the BI estate, agrees one definition per number, and then opens the same governed numbers to plain-language questions. Curated dashboards keep answering the planned questions. Dialog with Data answers the next one.

HOW KPI PARTNERS TAKES A BI ESTATE TO AI-DRIVEN BI

01
Modernize the BI estate
The GenAI-Based BI Modernization Accelerator moves reports from any BI tool to a modern platform, with AI-ready semantic models.

02
Agree one definition per number
Semantic Core consolidates duplicate measures into one agreed, owner-approved definition.

03
Add business context
The Enterprise Context Engine gives AI certified definitions, synonyms and permission-scoped data.

04
Validate before release
The Validation Engine tests AI answers against the dashboard numbers before anyone acts on them.

05
Ask in plain language
Dialog with Data and Static BI to AI open dashboards to governed questions in Genie, Copilot, Fabric data agents and Teams.

WHAT FUNCTION LEADERS KEEP AND GAIN

- **Curated reporting stays** Persona dashboards and certified datasets keep running for the questions they were built for.
- **One number, two experiences** Dashboards and AI answers draw on the same semantic layer, so the numbers always agree.
- **Weeks per domain, not quarters** Pre-built accelerators turn a multi-quarter BI-to-AI program into weeks per domain.

Up to 85%

saved on BI migration time and cost with AI-assisted conversion

DASHBOARDS AND AI, SIDE BY SIDE, IN THE CASES IN POINT

CASE IN POINT 01 | FINANCE

Finance semantic models for Profit and Loss, balances, General Ledger, Accounts Payable, Accounts Receivable and revenue feed Power BI and Excel, so every report and every AI answer share one definition.

CASE IN POINT 02 | MARKETING

Executive (17 Key Performance Indicators), Campaign (17) and Event (9) dashboards in a Power BI app, with drill-through from Executive to Campaign and Event, on the certified dataset that Genie and Copilot also use.

CASE IN POINT 03 | FINANCE AND SALES

Existing BI stays in place. Answers arrive in Teams and embedded apps with no forced move to a new BI front end, reaching users beyond BI license holders.

Function-specific AI, for every function

The three cases in point cover Finance, Marketing and Sales. The same approach applies to any function. DomainIQ Agents are KPI Partners' domain-expert AI agents for Finance, Sales, Human Resources, Procurement and Supply Chain, and when a function is not yet in the suite, KPI Partners custom-builds the agent for the client's use case.

DELIVERED

Finance

Cases in point 01 and 03, plus DomainIQ Agents for Finance

DELIVERED

Marketing

Case in point 02

DELIVERED

Sales

Case in point 03, plus DomainIQ Agents for Sales

DELIVERED

Human Resources

DomainIQ Agents for Human Resources

DELIVERED

Procurement

DomainIQ Agents for Procurement

DELIVERED

Supply Chain

DomainIQ Agents for Supply Chain

CUSTOM-BUILT

Any other function

Legal, Information Technology and more: name the function and KPI Partners builds the agent for the use case

Domain-expert, not generic
Each agent knows how its function works: its metrics, entities and business rules.

Governed by design
Guardrails, human-in-the-loop, role-based access and a full audit trail on every agent.

Dashboards and agents together
Each function keeps its curated dashboards, and agents answer from the same governed definitions.

Runs on the client's stack
Azure and Fabric, Databricks, Snowflake, AWS or Google Cloud. No rip-and-replace.

HOW WE CATER TO EACH FUNCTION

The function metrics, entities and questions our accelerators encode, as delivered in the three cases in point

FINANCE

- Consolidated Profit and Loss and balances
- General Ledger accounts and journals
- Accounts Payable and Accounts Receivable subledgers
- Supplier spend and invoices
- Client revenue and collections
- Plan versus actuals
- Reported and constant-currency views
- Month-end close and reconciliation

MARKETING

- Marketing-sourced pipeline
- Marketing-influenced pipeline
- Marketing and Sales Qualified Leads by campaign
- Marketing Return on Investment and Return on Ad Spend
- Cost per Marketing and Sales Qualified Lead
- Email open, click-through and click-to-open rates
- Registration to attendance
- Event-attributed opportunities and event ROI

FINANCE AND SALES

- Sales performance summaries
- Revenue per region
- Quarterly revenue by customer and country
- 12-week revenue
- Volume growth by pack size
- Quarter-to-date and year-to-date aggregations
- Next-quarter sales forecast
- Company-specific finance Key Performance Indicators

Finance Explains Any Number in One Conversation

How a global professional services firm gives Controllers, Accounts Payable, Accounts Receivable and Finance Business Partners one conversational way to explain the numbers: from a consolidated balance or Profit and Loss line down to General Ledger accounts, journals, subledgers and the source invoice.

BUSINESS BENEFITS

What Finance gains

- Faster month-end investigation, reconciliation and variance analysis
- Self-serve access to transaction and invoice evidence
- Consistent definitions and trusted numbers
- One place to ask across consolidated, General Ledger, Accounts Payable and Accounts Receivable data
- Evidence ready for management commentary
- Less time navigating multiple systems and reports

CLIENT
Global professional services firm

WHO ASKS
Controllers, Accounts Payable, Accounts Receivable and Finance Business Partners

PLATFORM
Microsoft Fabric, Fabric Data Agents, Copilot, Power BI

STATUS
Delivered

EXPENSE ANALYSIS **The question:** Why has this expense category increased this period?

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Consolidated balance	General Ledger accounts	General Ledger journals	Payables subledger	Supplier transactions	Source invoice

DASHBOARDS AND BI
Finance semantic models for Profit and Loss, balances, General Ledger, Accounts Payable, Accounts Receivable and revenue feed Power BI and Excel, so every report and every AI answer share one definition.

WHY THIS IS AI, NOT JUST BI
Explains why, following lineage down to the journal, client or source invoice behind it, with the evidence attached.

HOW WE CATER TO FINANCE: THE METRICS AND WORKFLOWS WE ENCODE

- Consolidated Profit and Loss and balances
- General Ledger accounts and journals
- Accounts Payable and Accounts Receivable subledgers
- Supplier spend and invoices
- Client revenue and collections
- Plan versus actuals
- Reported and constant-currency views
- Month-end close and reconciliation

WHY KPI PARTNERS: ACCELERATORS AND OFFERINGS APPLIED

- Dialog with Data
- DomainIQ Agents
- Enterprise Analytics Accelerator
- Enterprise Context Engine
- Microsoft Fabric and AI Services

- **Finance data engineering:** Enterprise Resource Planning and consolidation data integrated, harmonized and reconciled in Fabric
- **Agent and orchestration design:** Profit and Loss, General Ledger, Accounts Payable, Accounts Receivable and Client Revenue Agents, routed by an Orchestration Agent
- **Semantic modeling** that encodes Finance logic across Profit and Loss, balances, General Ledger, Accounts Payable, Accounts Receivable and revenue
- **Finance validation** through approved questions, measures and review of AI explanations

OUTCOME Finance moves from a consolidated number to the transaction explaining it, in one conversational experience.

Marketing Proves Its Pipeline Impact From One AI-Ready Source

How a global professional services firm gives Executives, Campaign Managers and Event Leads one governed source for marketing-sourced and influenced pipeline, with agreed Marketing and Sales Qualified Lead definitions that power Power BI dashboards and ground Databricks Genie and Power BI Copilot.

BUSINESS BENEFITS

What Marketing gains

- One trusted view of marketing's pipeline impact
- Faster campaign and event decisions
- Evidence for marketing investment
- The same number in every dashboard and every AI answer
- Less manual reconciliation between marketing automation and Customer Relationship Management data
- 43 Key Performance Indicators across Executive, Campaign and Event personas

CLIENT
Global professional services firm

WHO ASKS
Executives, Campaign Managers and Event Leads

PLATFORM
Databricks, Unity Catalog, Databricks Genie, Power BI, Power BI Copilot

STATUS
Delivered

EXECUTIVE DRILL-DOWN **The question:** Why is marketing-sourced pipeline below plan?

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Pipeline Key Performance Indicator	Region	Channel	Campaign	Lead funnel	Insights

DASHBOARDS AND BI
Executive (17 Key Performance Indicators), Campaign (17) and Event (9) dashboards in a Power BI app, with drill-through from Executive to Campaign and Event, on the certified dataset that Genie and Copilot also use.

WHY THIS IS AI, NOT JUST BI
Lets each persona ask follow-up questions in plain language through Genie or Copilot, grounded in the same 43 Key Performance Indicator definitions.

HOW WE CATER TO MARKETING: THE METRICS AND WORKFLOWS WE ENCODE

- Marketing-sourced pipeline
- Marketing-influenced pipeline
- Marketing and Sales Qualified Leads by campaign
- Marketing Return on Investment and Return on Ad Spend
- Cost per Marketing and Sales Qualified Lead
- Email open, click-through and click-to-open rates
- Registration to attendance
- Event-attributed opportunities and event ROI

WHY KPI PARTNERS: ACCELERATORS AND OFFERINGS APPLIED

Dialog with Data | Enterprise Context Engine

- **Marketing data engineering:** a governed Bronze, Silver and Gold data lake with data quality checks
- **Semantic modeling:** 43 Key Performance Indicator measures, row-level security and a certified dataset
- **Signed-off metric definitions** for Marketing Qualified Leads, Sales Qualified Leads, and sourced versus influenced pipeline
- **Persona-led delivery** with persona owners engaged in user acceptance testing

OUTCOME Marketing now shows the pipeline and revenue it generates, and acts on campaign and event performance, from one governed source.

Finance and Sales Get 99%+ Accurate Answers in Plain English

How a leading U.S. beverage manufacturer lets finance and sales users ask about revenue, volume, growth and forecasts in plain English, and get an explained answer, a result table and a chart from Snowflake, right where they work.

BUSINESS BENEFITS

What Finance and Sales gain

99%+
accurate responses overall

100%
on the client's 150-question validation set

80% → 100%
first release on GPT-3.5 to GPT-4 with KPI Partners accuracy strategies

- Faster answers in Microsoft Teams or embedded apps
- No forced move to a new BI front end
- Understands the company's own terminology
- Reaches users beyond BI licenses, with a lower total cost of ownership

CLIENT
Leading U.S. beverage manufacturer

WHO ASKS
Finance and sales users

PLATFORM
Snowflake, Azure OpenAI, GPT-4, GPT-4 Turbo

STATUS
Delivered

ONE DIALOG, END TO END **The flow:** How a plain-English question becomes an answer

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
Ask in plain English	Add company context	GPT-4 writes query and Python code	Run securely on Snowflake	Self-correct if needed	Answer, table and chart

DASHBOARDS AND BI
Existing BI stays in place. Answers arrive in Teams and embedded apps with no forced move to a new BI front end, reaching users beyond BI license holders.

WHY THIS IS AI, NOT JUST BI
Answers new finance and sales questions in plain English, with calculations at query time, for users in Teams and embedded apps.

HOW WE CATER TO FINANCE AND SALES: THE METRICS AND QUESTIONS WE ENCODE

- Sales performance summaries
- Revenue per region
- Quarterly revenue by customer and country
- 12-week revenue
- Volume growth by pack size
- Quarter-to-date and year-to-date aggregations
- Next-quarter sales forecast
- Company-specific finance Key Performance Indicators

WHY KPI PARTNERS: ACCELERATORS AND OFFERINGS APPLIED

Dialog with Data | AI Engineering

- **Data dictionary** of the company's own terms, finance Key Performance Indicators and metrics
- **GenAI-friendly data model** with clean, conformed data and joins kept in config files
- **Tailored library of few-shot Structured Query Language (SQL) examples** and dynamic code templates that guide each answer
- **Validation** against a client-supplied dataset and 150 business questions

OUTCOME
Users ask finance and sales questions in plain English and get accurate, explained answers from Snowflake, right where they work.

The accelerators behind the client impact

KPI Partners brings pre-built, function-ready accelerators to every engagement, so clients start ahead and reach trusted, function-specific answers faster. These are the accelerators and offerings behind the three cases in point.

KPI PARTNERS ACCELERATOR

Dialog with Data

Turns governed BI into trusted, plain-language conversation, so every answer resolves to one governed number, validated before anyone acts on it.

DELIVERED IN THE CASES
Finance investigation on Microsoft Fabric, marketing pipeline on Databricks Genie and Power BI Copilot, finance and sales questions on Snowflake

KPI PARTNERS ACCELERATOR

DomainIQ Agents

Governed, domain-expert AI agents for Finance, Sales, Human Resources, Procurement and Supply Chain, pre-built or custom-built for any function.

DELIVERED IN THE CASES
Profit and Loss, General Ledger, Accounts Payable, Accounts Receivable and Client Revenue Agents for Finance, routed by an Orchestration Agent

KPI PARTNERS ACCELERATOR

Enterprise Analytics Accelerator

Pre-built analytics for Oracle, Workday, Microsoft Dynamics 365, SAP and Salesforce, so function analytics start from what already works.

DELIVERED IN THE CASES
Enterprise Resource Planning finance data across General Ledger, Accounts Payable, Accounts Receivable and subledgers, modeled into Profit and Loss, balance and revenue models

KPI PARTNERS OFFERING

Enterprise Context Engine

Governed, verified context for AI on Databricks, Microsoft and Snowflake: certified definitions, permission-scoped data and verified answers.

DELIVERED IN THE CASES
A Finance ontology and synonyms; canonical marketing Key Performance Indicator definitions in Unity Catalog metric views

KPI PARTNERS OFFERING

Microsoft Fabric and AI Services

Modernize on Microsoft Fabric, then put Copilot and Fabric data agents to work on the same governed data.

DELIVERED IN THE CASES
Fabric Lakehouse, Warehouse, semantic models and Data Agents for Finance

KPI PARTNERS PRACTICE

AI Engineering

Agentic AI, generative AI and machine learning engineered from pilot to production, on the platform the client already runs.

DELIVERED IN THE CASES
An Azure OpenAI engine with a self-correcting loop and guardrails for finance and sales questions

WHY CLIENTS PREFER KPI PARTNERS FOR FUNCTION-SPECIFIC AI

Function-first
Finance, Marketing and Sales delivered. The same approach extends to Human Resources, Supply Chain and Procurement through DomainIQ Agents, pre-built or custom-built for the use case.

Platform-neutral
Delivered on Microsoft Fabric, Databricks and Snowflake in these three stories. DomainIQ Agents also run on AWS and Google Cloud.

AI-ready by design
Governed data, one definition per number and tested answers, so dashboards and AI agree before AI reaches users.

Engineering-led, accelerator-backed
Pre-built accelerators and an engineering team that takes use cases from pilot to production.

KPI PARTNERS ACCELERATORS AND OFFERINGS

Built for AI-driven BI and function-specific AI

KPI Partners brings these accelerators and offerings to every engagement, on the platform the client already runs, pre-built or custom-built for the function and use case.



Dialog with Data	From dashboards to governed, plain-language questions
Enterprise Context Engine	Governed, verified context for AI on every platform
Microsoft Fabric and AI Services	Modernize on Fabric, then put Copilot and agents to work
DomainIQ Agents	Domain-expert agents, pre-built or custom-built
GenAI-Based BI Modernization Accelerator	Any BI tool to a modern, AI-ready BI platform
Enterprise Analytics Accelerator	Pre-built analytics for Enterprise Resource Planning, Customer Relationship Management and Human Capital Management systems
AI Engineering	Agentic AI, generative AI and machine learning, from pilot to production

ABOUT KPI PARTNERS

KPI Partners is a data, analytics and AI consultancy helping enterprises turn trusted data into decisions. Founded in 2006 and headquartered in Oakland, California, with offices in India, Mexico and London, KPI Partners has more than 600 consultants serving over 300 enterprise customers. KPI Partners is a Microsoft Solutions Partner for Data & AI and Digital & App Innovation, and has been recognized by Gartner five times as a Data & Analytics consulting organization.