



Make Power BI Data Consumption Simpler: Integrate Chatbots

How Different CPG Companies Are Using Chatbots To Drive Customer Experience

Integrate chatbots with Power BI – If you're a Microsoft customer you must be intrigued by this statement. You must be thinking along the lines of...

Is it even possible to integrate a bot with Power BI? How does the Power BI chatbot function? What are the benefits? or PowerBI also has Q&A , Trigger feature, how is it different?

Our short answer is – Yes! With the right chatbot builder platform, you can fully integrate a chatbot with Power BI and simplify data consumption.

As a Microsoft Gold Partner, we have helped several customers achieve this and build a culture of data in their organizations.

Before understanding more about Power BI chatbots, let's have a quick look at the current state of Power BI users and how they access data.

Current State Of Accessing Power BI Data

The traditional way of accessing data through Power BI (or any BI system for that matter) is by logging into the application, navigating through dashboards, digging through irrelevant data, filtering them and generating the desired report.

Now imagine doing this every time you need a quick insight.

Say, you're in the middle of a customer meeting and you are asked about a critical sales KPI you didn't cover in your PPT. Or consider your boss asking for a specific performance metric in a review meeting. Or suppose you're a C-Suite executive on the road and need a quick revenue KPI to make a significant business decision.

In all these scenarios, you can't possibly access the needed insight from Power BI on the spur of the moment and as a result the opportunity to make an impact will be lost.

Because of the long drawn process of accessing data, employees won't be motivated to use data more often in their everyday decision-making and thereby the adoption also decreases. In an age where data is the oil, employees need data at the tip of their fingers.

Integrate Chatbots With Power BI To Simplify Data Consumption

A chatbot is a computer program with artificial intelligence capability that can conduct conversations via auditory or textual methods. While chatbots are all the rage in customer service domains, an additional use case of chatbots is that they can be used to fetch information quickly from an organization's business intelligence systems, making data access a breeze.

Learn more: [Business Intelligence Chatbots](#)

For example, one might simply ask natural language questions like "What are my predicted sales for product X?" and the bot will instantly answer via text or any multimedia format (image, graphs, pie charts etc.) with the relevant information. In order to better understand how this works, look at the following example.

Example:

Nathan is a Sales Manager at ABC Corp who usually travels one location to another to meet multiple customers in the region. Since he is on-the-go, he doesn't have the time to constantly open the Power BI application, switching dashboards and filtering data. He needs quick granular information at his fingertips. With a sales intelligence chatbot, he can have a quick chat, ask natural language questions about KPIs and also get the required reports.

Here is a quick example:

Nathan is scheduled to meet with the head of Alpha Foods, a long-standing customer of the company. One of the issues that Alpha Foods is facing is a steep decline in sales. Before he walks into the meeting, Nathan wants to be abreast of the company's revenue and sales data.

He decides to use Mylo, ABC Corp.'s BI chatbot in Slack that is integrated with the company's Power BI system.

Nathan: Hi Mylo.

Mylo: Hello Nathan. How can I help you today?

Nathan: Show me Alpha Foods' annual revenue details for last year.

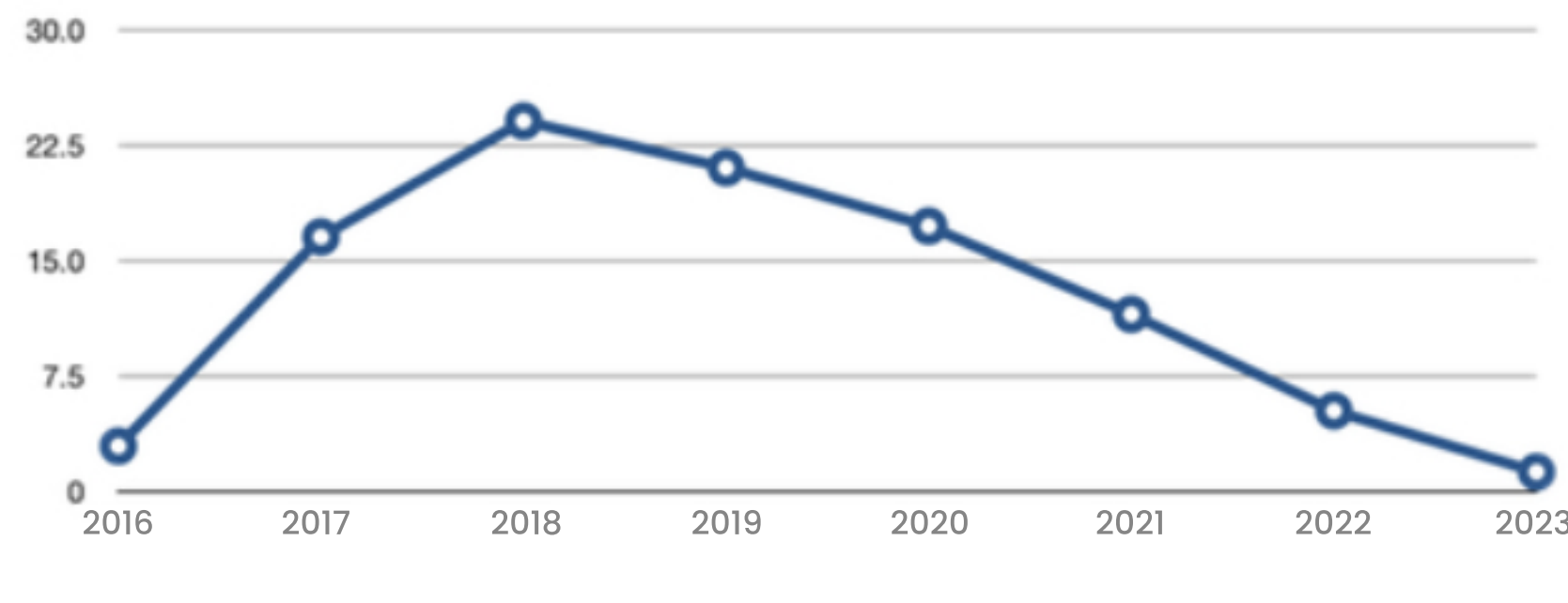
Mylo: Sure. Alpha Foods' annual revenue for 2021 - 2022 is 90 Billion.

Nathan: Okay, can you break that down by region?

Mylo: USA – 32B, Asia Pacific region – 35.7B, Europe – 22.3B.

Nathan: Okay, can I see a graphical representation of their sales in the Asia Pacific region?

Mylo: Yes.



Nathan: Well, that doesn't look good. What about their sales in Europe and the USA?

Mylo: They seem to be doing pretty well there. Sales in Europe have seen an improvement of 6% on average annually. Sales in the USA are on the uprise too – at an average annual rate of 2%.

Nathan: Map sales numbers for Asia Pacific with their trade promotional campaigns from the last 5 years.

Mylo: There are no trade promotions from Alpha in Asia Pacific between the years 2016 - 2023.

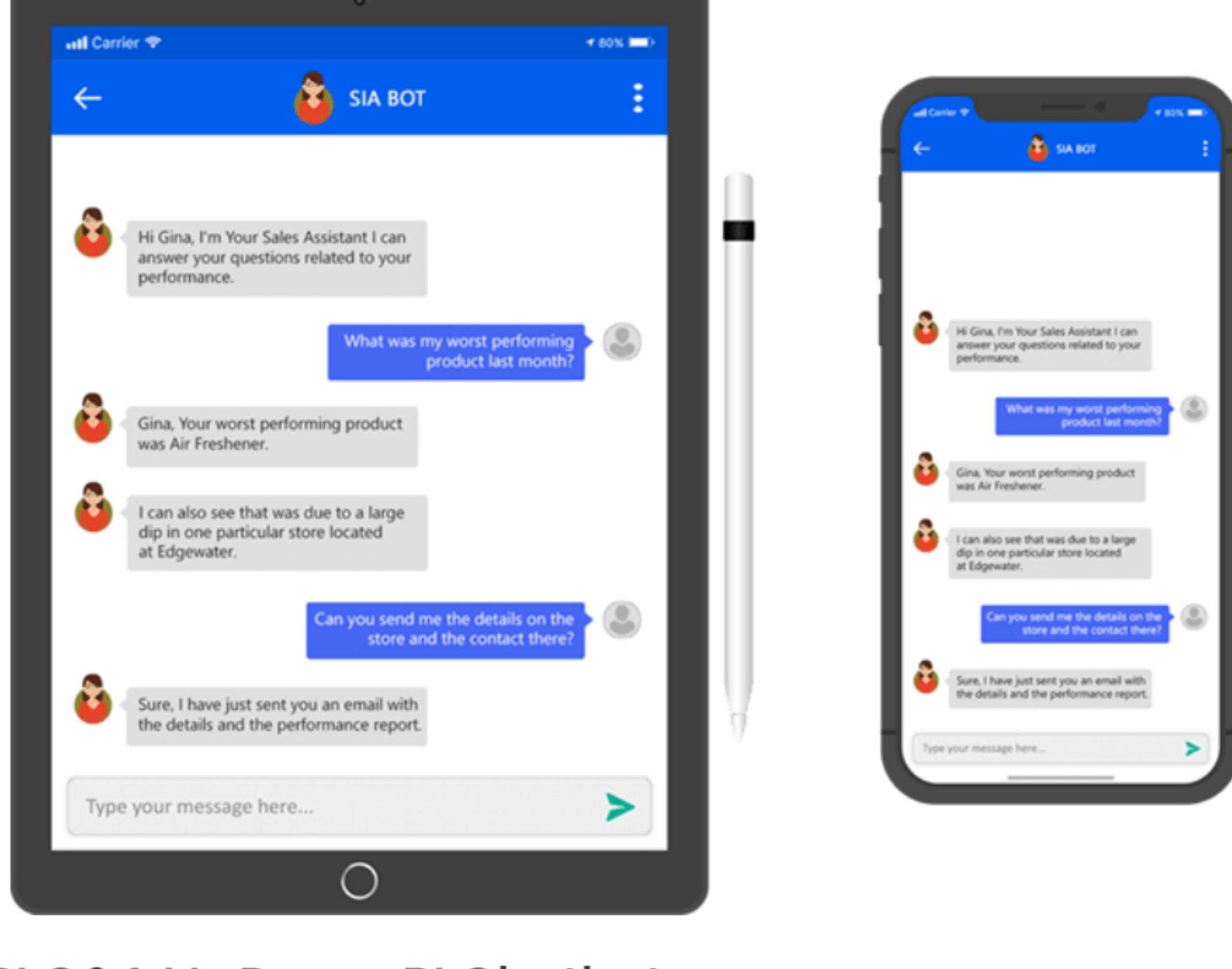
Nathan: Okay. Can you mail these figures to me as well?

Mylo: Sure. The details have been sent to your email.

Nathan has understood that Alpha Foods is facing an issue specifically in the Asia Pacific region as they are facing a hard time attracting customers to their products. Nathan uses the data insights provided by Mylo to suggest a new trade promotional campaign to boost sales for Alpha in the Asia Pacific region.

Did you see how easy that was? Now imagine the amount of work it would take for all this data to be generated manually using the traditional Power BI workflow. The vast difference in the convenience factor and speed of fetching relevant data, is what makes chatbot integration with Power BI so desirable. Using the bot, you don't even have to login to your BI system or switch multiple apps to access the desired analytics and data. In a nutshell, data consumption becomes much easier when a chatbot is integrated with Power BI.

Here's One More Example Of A Power BI Chatbot:



Power BI Q&A Vs Power BI Chatbot

As you are reading through this article, you might be wondering how a Power BI chatbot is different from Power BI Q&A and what more can a chatbot solution offer. While the Q&A feature of Power BI is effective, a chatbot is even more powerful for access insights. Here's why:

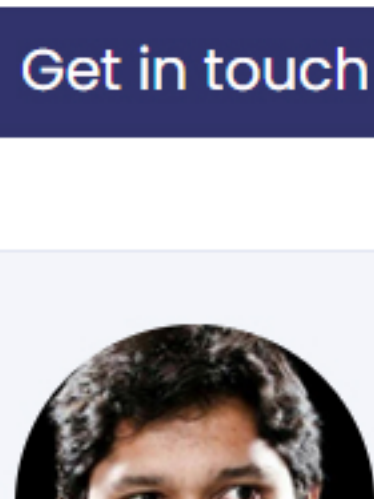
1. Q&A feature delivers results solely based on the report/dashboard's keywords. i.e if any one of the keywords in the user's query doesn't match with the values in a dataset, those values will be missed out in search results. Whereas an AI-powered chatbot provides flexibility to use natural language for searching data and delivers relevant results based on intent and entities.
2. In addition, for using Power BI Q&A feature, users should be fully aware of the data stored in the dashboards so they can use the right keywords in their search query.
3. Power BI can also deliver proactive alerts on KPIs. Users can set alerts for their desired KPIs and the chatbot sends an alert message whenever there is a notable deflection to the KPI.

Some of the features of the our Power BI chatbot, include:

- **Multi media responses:** Bots can respond to users in both text and rich media formats.
- Bots can function in both **on-premise** and **cloud**
- **Seamless Integration** – Power BI chatbot can seamlessly extract data from various other data systems such as ERP, CRM, LoB and Data warehouses.
- **Natural Conversations** – The chatbot uses NLP (Natural Language Processing) and learns the office jargon.
- **Real-Time Alerts** – The chatbot is also equipped to periodically send key data or analytical updates that are relevant to the user. Especially in case of any data trends, the BI chatbot swiftly updates the user.
- **Security** – BI chatbots are highly secure and are integrated with various access checkpoints such as User Authentication, User Authorization, Multi-Factor Authentication, One Time Authorization and Channel Authorization.

If you'd like to learn more about our solution, please feel free to get in touch with one of our Power BI and AI experts for a personalized demo!

[Get in touch with our experts](#)



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Shanawaz is leading the Data and Analytics practice in Acuvate. He has been doing IT consulting in the data and analytics space for large CPG and BFSI companies for more than a decade. He manages the Data & AI services portfolio and ensures the technical deliverables are top-notch.