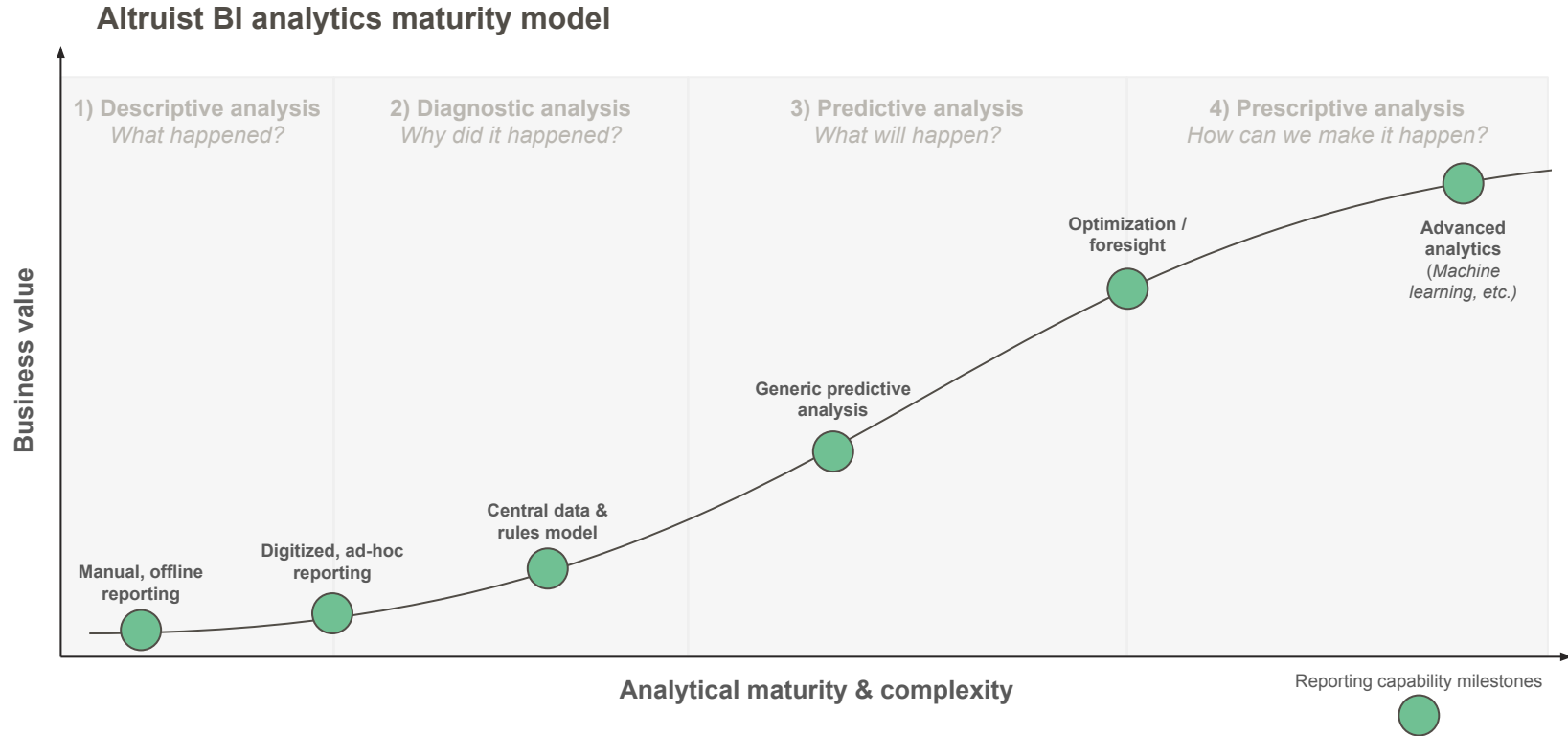




Business Intelligence Team Overview

Marc Greenberg, CFO
January 2025

Mission: Grow analytical maturity to enhance decision-making



Analytics capabilities “snowball” over time, and can be developed simultaneously at different levels of maturity

Build & enable reports to meet analytics needs



Dashboards

- Interactive reporting assets designed to your specifications
- Deployed in dashboarding tool to as many or as few teammates as needed



Insights

- Deep-dive analysis to understand business drivers
- Produced for board presentations or on request



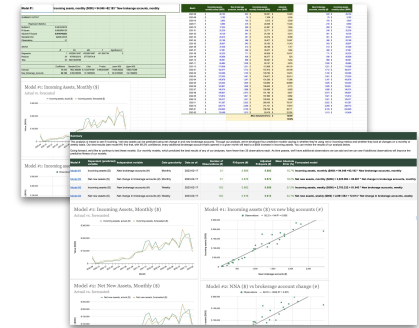
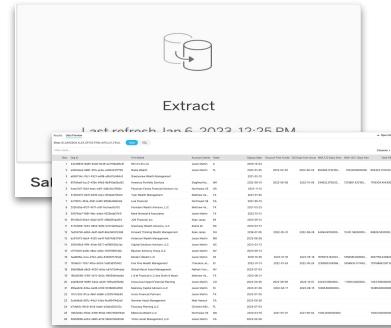
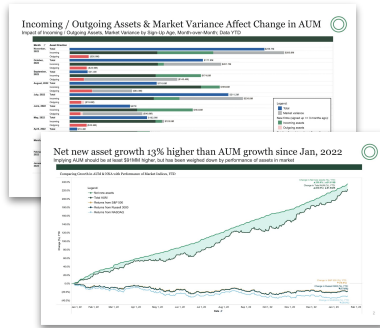
Datasets

- Enable self-service analytics & reporting for teams
- Available through warehousing tool



Forecasts

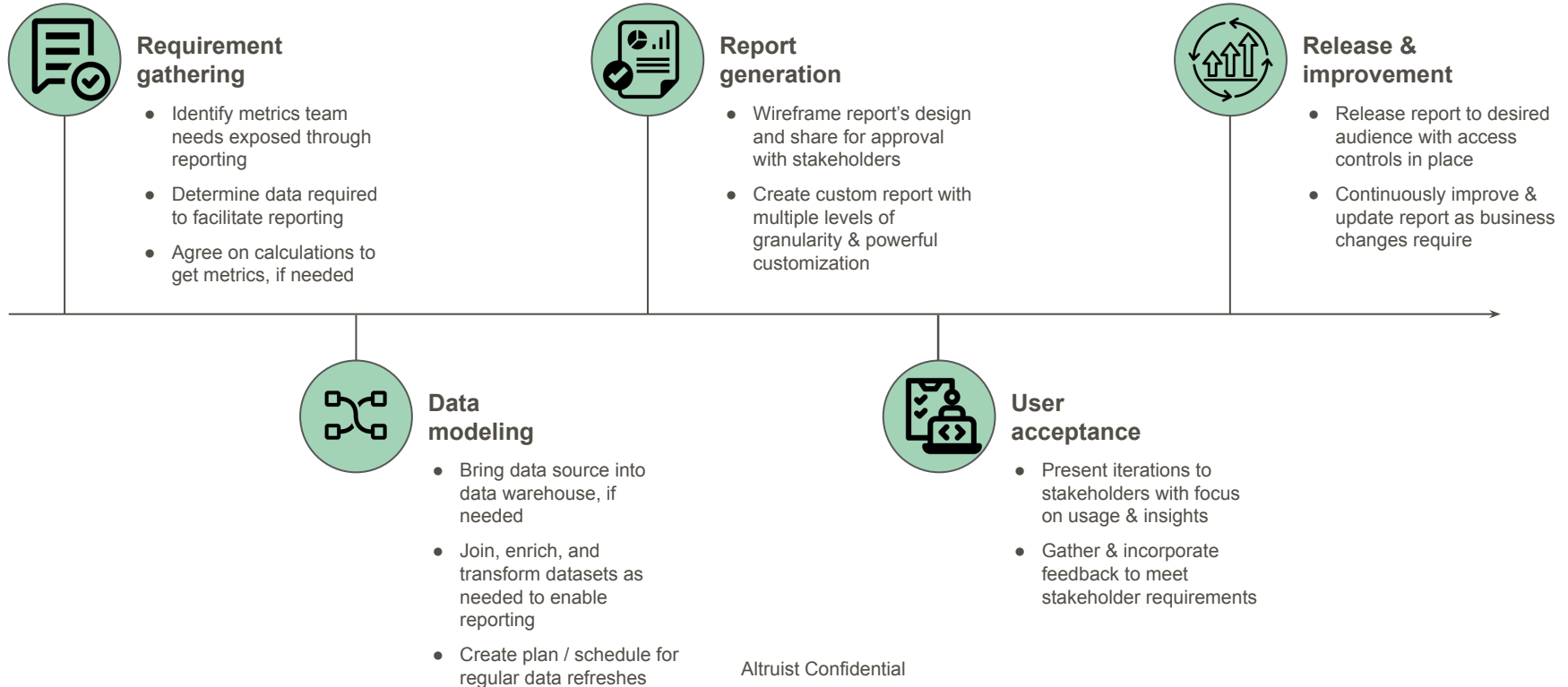
- Forecasting growth based on relationships between metrics



Stakeholder input & collaboration at the heart of every reporting asset



Our development process



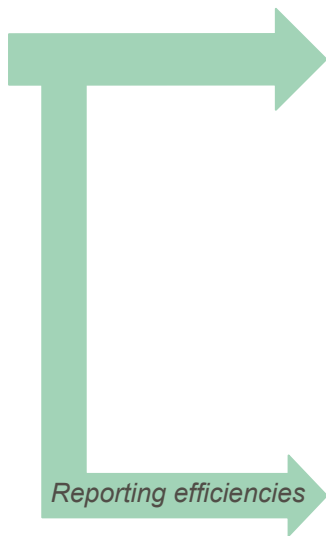
Centralized reporting “source of truth” will transform the way we work



Central
Data
Model

“The single source of truth”

- Single location for all reporting data
- Complete documentation, including clear definitions and lineage
- High fidelity reporting data enabled by automated testing, error checking, and validations
- Automated refresh execution managed by CI / CD pipelines



Enabling advanced analytics

- Create models to forecast growth of key metrics and inform potential opportunities and actions



Data-driven decision making

- Richer, more readily available insights enabling well-informed decisions by business & leaders



Shorter report time-to-market

- Complete, transformed, well-defined data enables faster querying



Faster refreshes

- DAGs built in dbt result in shorter processing time



Reduced risk of errors

- Reusable models mean no more “copy & paste” logical updates



Repeatability

- Minimize rework needed for net new reports & improvements

Tech Stack



Data

Tool	Description
Snowflake	Data warehousing tool used for all reporting purposes. Can also be used for data exploration and querying
Fivetran	ETL tool to bring data from outside sources into our Snowflake instance
dbt (data build tool)	dbt is a tool to help write and execute the data transformation jobs that run inside our data warehouse
Hightouch	Hightouch is a Reverse ETL tool that our team uses to push data from our Data Warehouse (Snowflake) to different Destinations like CRMs (Salesforce), Ticketing tools and more. Hightouch behaves in a similar way to Fivetran , just with data flowing in the opposite direction. See a recorded walkthrough here .
Amplitude	Amplitude is an event-based analytics tool that tracks the behaviors of users based on in-product interactions and analyzes user behavior in real-time.

Dashboarding

Tool	Description
Tableau	Tool to bring datasets together and create dashboards for reporting, alerts, etc.
Retool	Program to create and build internal tools connecting databases, APIs, reports, etc.

Design

Tool	Description
diagrams.net	Create flow charts that can be accessed in Google Drive and embedded in Confluence and other docs

Business Intelligence Team



- Reports into the office of the CFO
- Currently, no manager for the group - each team member works directly with their stakeholder and collaborates across the team
- The team includes four full-time senior analysts and one data engineering contractor (total company ~ 450 people)
- We work to empower leaders and enable decision making
- We prepare a “summary of insights” deck bi-monthly and share in slack in the [#ask-BI](#) channel
- We frequently solicit feedback and suggestions for improvement

Analysts:

x

Marketing/Customer
Success/Product

y

Sales/Customer
Success

z

Product/Clearing/
Brokerage

q

Customer Success

BI Skills & Competencies



Skills that make an effective BI team member: Data Analysis, Data Visualization, Business Acumen, Storytelling/Communication, Technical Proficiency, and Problem-Solving

Competencies

- Business and Stakeholder Partnership
 - Ability to work cross-functionally across different business areas and teams within the firm.
- Communication & Storytelling
 - Ability to receive and digest business needs from key stakeholders as well as to proactively inform stakeholders on key updates. Also includes the capacity for delivering insights through Storytelling.
- Technical ability and knowledge
 - Possessing the technical acumen in relevant tools and skills required for the role. This includes requirements gathering, data analysis, de-bugging, process improvement, anomaly identification, data visualization and quality control best practices.
- Agency
 - Ability to anticipate & address gaps independently, as well as proactively. Also includes having the wherewithal to reach out for guidance when required. Additionally the capacity to own one's own work and to hold oneself accountable.
- Ability to work in ambiguity
 - The skills required to intake partial or unclear business requirements and follow up on assumptions with relevant stakeholders. Being able to deliver results with limited resources or oversight at times through innovative problem solving.
- Business Acumen
 - The ability to embed oneself in relevant business areas and learn the necessary domain knowledge as well as opportunities for improvement within the function. Includes developing a broader understanding of the long term goals of the business area through defining & stakeholder sign off of relevant KPIs and their definitions.

Both skills and competencies evolve or expand through career progression, from BI Associate to Senior to Principal.

Example goals & OKRs



Goals	OKRs	Deadline	Targets	July	August	September	October	November	December
Increase Tableau adoption across Altruist	Achieve 75% active user utilization over rolling two months	EOY 2024	75%						
Deliver quality service & insights to business partners ¹	> 90% score on team CSAT	EOY 2024	90%						
Build out reporting relational data model ²	>= 16 entity-defined relational data models built in dbt	Q3 2024	16						
Expand documentation	>= 7 demo videos created for existing / new dashboards	EOY 2024	7						
Simplify BI request process	Open BI Jira requests board to the rest of the firm	Q1 2024	100%						

Legend

- Completed on time
- Some risk to complete on time
- Not expected to complete on time and blocked
- On track to complete on time