



Making Enterprise Analytics More Accessible

SUMMARY

A Fortune 500 convenience retailer needed a faster, more flexible way for business teams to access and analyze enterprise data. Existing reporting tools made it difficult to compare store performance, identify outliers, and answer questions that required analysis beyond predefined dashboards. Source Allies helped develop an AI-powered analytics solution that makes complex business data more accessible, enabling faster insights without relying on manual reporting and spreadsheet analysis.

APPROACH

Our team worked closely with the client's merchandising and engineering teams to establish trusted data access and develop an AI solution that could evolve alongside business needs.

- **Trusted Data Foundations:** Reconciled business metrics between existing Power BI reports and Databricks, establishing consistent definitions and reliable access to enterprise data.
- **Business-Driven Development:** Collaborated with merchandising stakeholders through weekly feedback sessions, prioritizing analyses based on real business questions and emerging needs.
- **Simplified Agent Architecture:** Developed a flexible, documentation-driven approach that allows existing data teams to extend agent capabilities without building custom workflows for every analysis.
- **Scalable Enterprise Design:** Established reusable agent patterns and department-specific capabilities to support expansion beyond merchandising into additional business functions.

SOLUTION

Source Allies developed an enterprise AI analytics agent that allows business users to explore sales, promotions, customer behavior, and store performance through natural-language questions. Built on Azure OpenAI, Databricks, and Python, the solution uses business documentation and shared data definitions to guide analyses without requiring a separate workflow for every question.

The team simplified the agent architecture as development progressed, making it easier to extend capabilities and incorporate new business knowledge. This approach supported rapid adoption within merchandising and enabled the development of a second agent for fuel analytics in a fraction of the original development time.

Results

**~1,600
Hours**

~1,600 hours of estimated analyst time saved in 16 weeks

90%

90% of analyses delivered within 6 minutes

30+

30+ Weekly active users before full rollout

2 Weeks

2 Weeks To develop a second enterprise AI agent