SaaS Provider's Guide to Delivering Data on Demand

How to level-up your software with the data accessibility today's business users need

CHATA

Introduction

In today's era of digital transformation, building scalable, cutting-edge solutions is the name of the game. Users demand it all from their software solutions: they expect to be onboarded quickly, that tools fit seamlessly into their daily workflows, and that they can navigate the system intuitively, even as the software becomes more powerful and the technology more innovative.

As a SaaS provider, you need to make critical decisions about what features users need and whether to build out those capabilities yourself or purchase another solution to augment what you're already building.

Whether you plan on investing in new technology or developing your own solutions, considerations around time, labor, and costs are paramount and it's important to carefully determine how you will allocate your resources to effectively meet goals and achieve the highest potential ROI.

We know that [business intelligence and analytics capabilities are more important than ever for today's data-driven business users.](#) Business data is generated constantly. Every process––from customer purchasing habits to factory floor efficiencies and beyond––creates data that can tell teams how to do their jobs better.

Data is critical for business success today and scalable growth tomorrow. With enhanced access to data, businesses can reduce time-to-insights and make strategic data-backed decisions that drive revenue, faster.

To stay competitive in the growing sea of options, software solutions need to facilitate frictionless access to data for every business user. Likewise, enterprises need to streamline their data processes to stay agile in today's rapidly evolving market.

In this guide, we'll introduce you to some options for delivering the data accessibility modern users demand from the software solutions they use each day. At the center of these solutions is conversational AI for database access, which brings the power of seamless user experiences to business intelligence-grade reporting and analytics.

Let's dive in!

Who is this guide for?

As leading businesses turn to their data to get ahead, SaaS teams need to think about enhancing data accessibility for every modern business user to stay competitive and launch their own business into the future.

This guide is for you if:

- You develop a software solution with analytics and reporting capabilities and want to improve them with seamless data access options that enable more users to leverage data and get more value from your system.

- Your team spends expensive time running ad hoc reports and building specialized dashboards for your customers, instead of developing new high-value features and growing your business.

- Companies you serve recognize the value of data, but their reporting processes take days and even weeks to fulfill: custom requests are funnelled to a specialized team, software power users, or individuals who know SQL.

- Companies you serve need to bring data to front-line staff, C-suite executives, and everyone in between––without these individuals needing to become analytics power users, BI specialists, or upskilled in writing database query language.

Actions you can take using this guide:

→ Identify and define data access challenges that you are looking to address
→ Create priority use cases for new data access solutions
→ Assess the current state of your own technology and your users' needs
→ Understand what to look for in a new data access solution
→ Navigate the solution discovery process efficiently and effectively

What do we mean by data accessibility?

When we refer to data access throughout this guide, we're taking about removing barriers to fully leveraging the volume of data in today's databases. Great data access empowers anyone in any role or industry to discover insights that enable them to drive value for the business they work for.

In today's digital world, the abundance of valuable data presents both an opportunity to get ahead––and a hurdle to overcome. The challenge for companies that want to use data to run their business better is not only collecting it, but organizing it, managing it, and ensuring that it's discoverable and explorable so that strategic decisions can be made––and action can be taken––based on accurate and informative insights that provide a holistic view of business performance.

Data doesn't mean much to businesses or individual team members if they can't access it or are unable to derive meaningful observations that could lead to informed actions. There are thousands of tools on the market aimed at making access to data easier, as evidenced by significant expansion in the realm of business intelligence and reporting software in recent years.

> 📖 **Data Access Defined**
>
> The means by which individuals can find specific information stored in a database and surface meaningful insights they can take action on.
>
> Today, data access is facilitated by tools like analytics, reporting, and BI software or via database query language searches.

These offerings vary significantly in the "levels" of data accessibility they offer. What we mean by this is that, more often than not, the level of data accessibility is inversely correlated with the system's level of usability.

For example, building a custom report that pulls in data from several tables in a database can only be completed by a team member who knows how to query a database using SQL or another specialized query language. They might format that report into something more digestible for the intended audience or pass that duty to another team member. Sometimes, the data isn't organized into meaningful visualizations at all.

Even with great BI tools, it's power users who get the most out out of systems today: they have the expertise required to build impactful visualizations and dashboards, the ability to write SQL to search for data on an ad hoc basis, and an in-depth understanding of how to create relevant conditions and navigate menus in the system.

Democratizing data access means giving every business user the right tools for the job by improving already powerful solutions with more intuitive, zero learning-curve data access features that support a broader range of user types.

Front-line staff on the sales floor, brand new interns, mid-level managers, and busy C-suite executive all need data to achieve success. Data access tools shouldn't create a new barrier to getting information, for anyone.

When looking to enhance data accessibility in your software solution, there are four key elements to consider:

Seamless integration with your database and excellent database coverage: Architectural complexity and dynamic database structures need to be supported by whatever data access solution you choose. Robust, flexible database coverage ensures the solution delivers frictionless access to details and also captures an accurate high-level view of what's going on in the data.
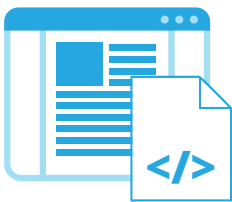
Easy to deploy in, and adapt to, your existing interface: The front end components of a new tool need to fit seamlessly into the interface your customers are already familiar with (e.g. embedding white-labeled widgets or customized implementation options). This speeds onboarding, streamlines user adoption, and keeps users engaged in their software experience.

Powerful end-to-end user experience: The more UX development that's already been done by the provider, the less work it is for your team to build new features that will resonate with your users. Remember, data access is only as powerful as the usability of the system. The better supported users are by the technology, the more value they'll find in the software they're investing in.

Solves problems for your team, not just your users: If your team plays an active role in your customer's path to accessing their data, it's important to ensure that new data access solutions free up their expensive time going forward. Improved data solutions allow your team to be largely hands-off the heavy lifting when it comes to getting customers answers and insights from their data.

Conversational AI can make this new standard of data accessibility achievable in every software type. In the next section, we'll define conversational AI for database access and give you a brief overview of its potential when applied in business software applications.

What's driving demand for AI in the new world of database access?

The volume of business data is exploding, and it's more important than ever to make the path to the insights as smooth as possible. Artificial intelligence has the power to transform the way users access and analyze their data.

With AI, processes that are typically highly manual, time consuming, and resource-intensive can be streamlined at reduced cost. Combining AI and business intelligence technologies holds major potential for business.

Here are key stats that reflect the competitive advantage AI for data access provides:

- **AI will support everyday analytics:** By 2021, 50% of analytical queries will be generated via search, NLP or voice, or will be automatically generated. Gartner

- **Customers demand seamless conversational experiences in digital spaces:** In 2019, 58% of customers said emerging technologies such as chatbots and voice assistance have changed their expectations of companies. Salesforce

- **AI will empower non-technical team members to engage deeper in data processes:** By 2025, a scarcity of data scientists will no longer hinder the adoption of data science and machine learning in organizations. Gartner

- **Data is an asset, and improving data accessibility enables business to achieve outcomes:** By 2022, 90% of corporate strategies will explicitly mention information as a critical enterprise asset and analytics as an essential competency. Gartner

- **AI drives revenue:** Businesses that successfully roll out and maintain AI initiatives are nearly three times more likely than those from other companies to report revenue gains of more than 10%. McKinsey

- **Data drives revenue, too:** Insights-driven firms are growing more than 30% annually and are on track to grow eight times faster than global GDP. Forrester

Step 1: Identify Pain Points & Define the Problem

Before investing in new solutions or building your own solution, it's important that you determine what specific problems you need to solve and how solving those problems will contribute to the overarching strategic goals of your business.

Planning at both the micro and macro levels will ensure that the solution you choose to implement or build will help you solve problems today and support growth tomorrow (and beyond). You'll need to determine:

- Why you're exploring new options for improving data access
- How these motives relate to broader strategic initiatives within your team or organization
- What "ideal state" or business outcome(s) will be achieved

Connecting Data Accessibility Challenges to Software Providers' Common Strategic Goals

Regardless of the core features you provide, making data more accessible to customers or users is just one factor that can enable you to enhance user experience and offer new value. You know that data is important to your customers and users, but it's important to understand how solving for improved data access will impact your business and help you reach goals.

Engaging Self-Serve Data Workflows	**Reduced Workload on Technical Teams**	**Democratized Data Access for All**
Keep users reliant on your solution and drive activity by meeting their data needs, 24/7.	Eliminate ad hoc reporting requests, so your team can get back to business.	Reach new user types with more intuitive tools that allow anyone to leverage their data.

3 benefits of enhanced data access functionality

In our experience providing solutions for software companies looking to implement enhanced reporting and analytics options, we've identified three common challenges that businesses aim to solve when it comes to data accessibility:

Streamlining user data experiences: In today's digital marketplace, user experience plays an important role in why customers choose to buy and, even more importantly, why they choose to continue using a product in their everyday workflows. Data-powered businesses rely on their software not only to get tasks done, but also to find meaningful data and discover insights seamlessly, regardless of where they're working (or where they're working within the software itself).

$$ *Continuously enhancing UX in new ways increases retention and boosts LTV. Delivering experiences that delight users and provide new value leads to increased engagement and greater loyalty that drives revenue.*

Reducing manual reporting and intensive analytics processes: From writing SQL to compiling reports and building custom dashboards, technical teams spend a lot of time in the data trenches trying to turn around usable data for their customers. Software providers looking to save time (and capital), and leverage their skilled technical team for higher-value tasks need to implement access-oriented functionality that enables customers to self-serve data processes like exploratory analysis and ad hoc reporting.

$$ *SaaS teams that effectively solve this problem can save on expensive labor or reallocate that labor to developing other features and driving new value for users.*

Democratizing data access for a broader range of user types: One of the hurdles faced by even the most widely-adopted BI tools is that greater functionality and complexity often results in a users having to achieve a higher degree of proficiency with the system before they derive value from it. This prevents analytics tools from providing value for non-technical business users or those with lower data literacy, thereby narrowing the market for these products.

$$ *With intuitive data access options, different types of users can get to their data, without needing to be power users or data experts. This allows software providers to vary the price of tiered offerings, or break into new markets with data access solutions that cater to broader classes of uses.*

When it comes down to it, the core objectives of a software business are to reduce costs and drive revenue. The ideal situation is that investing time and resources to solve the problem of data accessibility now will reduce costs in some area of the business while boosting incoming revenue from customers and users in the future.

The routes to those outcomes vary, so it's important to decide on a solution that's in line with *how* your organization plans to achieve these outcomes.

For example, improving data discovery workflows in your application enhances overall UX: users have a consistent, frictionless experience at every turn and increasingly come to depend on your system. This means they are more likely to continue subscribing to your offering and to share those success stories with other potential customers.

Answering "Why Now?"

After defining the problem and connecting it to core your business objectives, you need to assess why you need to make these changes at this time. How will solving data access issues in your software drive business outcomes for you over the next year? The next five years?

Here are a few examples of what you might consider when answering "Why now?":

- **The state of innovation and digital transformation in your industry:** are you an early adopter or are your competitors surpassing your current capabilities?

- **Where your customers and users are facing challenges in their own business:** do you have the opportunity to be a hero for businesses looking to access and leverage data in today's rapidly evolving marketplace?

- **Where your team's time is currently allocated:** with more innovative and self-service solutions for data access, could your talented team members drive much more value if they were not bogged down by an endless firehose of data requests?

Ensure Team Buy-In Early On

With any initiative, team buy-in and alignment from your internal team is critical for success. Once you've identified challenges and tied them to your larger goals, communicating the benefits of the decision to roll out new data access functionality will ensure that the process moves as fast as possible with the help of invested internal stakeholders.

These stakeholders should include a core group of individuals who will champion the adoption process and can help take the project from inception to completion with an understanding of the whys you've answered in the preceding sections.

Your team of champions could include:

Leadership Advocate/Champion: this team member presents the business case and secures sign-off from upper-level executives and check signers.

Project Manager or Team Lead: ensures milestones are reached and connects the required teams who are doing the work of implementing the solution and rolling it out to customers.

Technical Lead: understands the technical scope of the project and ensures that key milestones are hit throughout the implementation process.

First Users: Product team members who can test out use cases and ensure that the integration offers value and feels seamless to the customer or user.

Step 2: Assess Readiness for New Solutions

After you've solidified the problems you're looking to solve and the strategic goals you're hoping to accomplish, it's time to assess your current state to see where new solutions will fit and what the scope of work will be throughout the initial implementation process.

Define Your Use Cases

Let's return to the three core challenges experienced by software providers that we identified in Step 1. These three challenges can also be understood as the core use cases you would aim to solve for through your data accessibility improvement process. It's important to prioritize your use cases so that you choose the solution that will benefit your customers and users and, in turn, help you realize ROI as quickly as possible.

In summary, three core business cases for improving data access are:

1. Enhancing data experiences streamlines user workflows which drives engagement, retention, and LTV, boosting revenue.

2. Replacing extensive manual reporting processes with intuitive and scalable self-serve data access options allows your team to get back to doing higher-value work.

3. Diversifying your offering through democratized data access enabled by low-to-no learning curve processes broadens your reach to a new class of non-technical users.

TOOL
We've built out a Use Case Discovery Workbook to help you explore the specific needs of your organization and your users and customers.

Click here to get the workbook →

Through the use case development process, it's important for you to take inventory of why your customers need data and how data currently fits into their everyday workflows.

You also need to look at how customers and users typically perform data-related workflows within your software: figuring out what data customers request most often, how often they do so, and how data processes are being solved ad hoc by users outside of your solution.

Investing time and resources to solve the problem of data accessibility now will reduce costs while boosting incoming revenue from customers and users.

A third component that deserves a critical eye are the data discovery workflows that your team executes on behalf of customers.

Take this opportunity to go through, step by step, how long it takes your team to work through an ad hoc or custom data request for a customer. Look at what information, and in what format, users are requesting data from your team. This will help you measure ROI as you move ahead with this project as this is where you can leverage a new solution to significantly reduce labor costs.

Fill out the Data Services Questionnaire in the Use Case Discovery Workbook to assess the current cost of your team fielding custom reporting and data requests for your customers.

Determine Technology Readiness

Before exploring new data access solutions, you need to assess the current state of your software as well as the current state of the underlying database you are hoping to grant improved access to.

At this point, it's helpful to take a look back at what your business objectives are, as this stage will have you looking at structural components that you might consider altering or prompt you to focus on finding custom solutions that serve your unique software and database architecture.

Here are some questions to consider at this stage about your technology:

- Does your software produce or collect a significant amount of data that your users currently (or would find) valuable?

- How is your data currently organized in your database?
  - Do you already have a data lake or a single database where users can easily access data from?
  - Is any of the data siloed in separate databases?

- How is data managed and maintained? In other words, what are your data hygiene practices?

- What are the core user motivations or jobs to be done of your software? How does this work get done through the user interface you currently offer?
  - In an ideal future state, how and where would users access data within your software? Where would the features aimed at enhancing data access fit into your current UI?
  - Do you need to build out new front end components (like dashboards, a new tab for analytics, a search bar)?

- What data does your system currently surface for customers and users?
  - Are there default dashboards and/or reports already set up? How customizable are these tools?
  - What information is missing from current reports and these analytics? What are your users frequently requesting or asking questions about?

Here are some questions to consider about your technical team and the scope of the project:

- Is there technical buy-in?
  - Does the team understand why better data access improves the product and/or their daily workflows?
  - Are they committed to creating more user-friendly data workflows?
  - Are they willing to focus on user data experiences at this time? (as opposed to other pressing issues or new feature builds)

- Does the cost reduction and future revenue increase balance out the investment of team time to be allocated to solving the issues around data access?

Step 3: Comparing the Efficacy of Data Access Options

In this section, we'll dive into the types of data access tools that are currently available. These include both as stand-alone offerings (like BI software) and analytics and reporting features within business software that also encompasses other functionality (like CRM, scheduling, or inventory software, for example).

The section can help you determine what kind of solution is most suitable for your customers and users based on their data literacy, skill level, and the jobs to be done that they encounter most often when it comes to data.

What do we mean by data access tools?

Today, data is typically accessed and organized for analysis using analytics and reporting software which encompasses business intelligence (BI) software, including embedded BI. For the purposes of this guide, data access tools also include manual processes like writing SQL or other database query language code and developing visualizations or custom reports in third-party tools like Excel to present the data in a meaningful way.

The purpose of any data access tool is to help users surface insights that can then be used in decision-making processes.

Assessing the Efficacy of Data Access Tools

When it comes to data access there are two factors to consider that at first glance seem to be at odds with one another: complexity and simplicity.

To find unique insights deep in the data, a data access solution needs to be able to handle complex queries and exploratory workflows, combine data from different tables or even different databases, and offer options to dig into granular details.

To bring the power of data-backed insights to everyone in an organization, the tool needs to be simple enough for non-technical users to understand without extensive specialized upskilling in the software itself. It also needs to make data accessible on the

fly: even power users benefit from streamlining access to data, especially as they realize they can spend significantly less time navigating a complex interface, toggling through dashboards, or writing custom SQL.

Driving Revenue with Data Access Features Users Need

A robust BI tool can slice and dice data any way you can think of. It can enable you to produce elegant dashboards with meaningful visualizations, and it offers options for segmenting data and exploring data you never thought to look at as unique insights surface.

But, typically, users who get the most out of these tools have specific knowledge or are specially trained in how to use them. These individuals might be data analysts or BI specialists. This is a barrier for users who need access to the data, but who haven't upskilled to leverage the tool to its full capacity.

The power user has a lot of information at their fingertips. But as the data multiplies, so do the dashboards and custom reports they're able to build within the system.

This means that critical insights begin to bury themselves even as power users attempt to make the data more visible. This wealth of data contributes to an increase in cognitive load for both power users and other team members who will eventually need the dashboard.

This ultimately makes workflows more tedious and overwhelming for the power user to move through and slows the process of effectively sharing meaningful information with non-power users.

With this in mind, the best data access option is one that supports the widest range of user types and user ability, by offering a level of flexibility and customization that enables anyone to surface deep insights and meaningful data for their unique needs.

Analytics functionality is something most software providers charge extra for within their pricing structures.

Advanced analytics and reporting tools incentivize your buyers to opt for more expensive plans that include the data access they need to run their business.

Software providers with fixed subscription packages can drive revenue by increasing the value of their highest subscription tier to encompass comprehensive analytics functionality.

If subscriptions are charged per user, providers can earn more revenue with analytics that serves more types of users, encouraging customers to add more of their team members to the system so that data-driven decision making happens across teams.

Here are a few questions to consider when exploring your options for enhancing data access in your software:

- What business objectives can better data access help your customers and users achieve?

- Which of your user personas leverage data most frequently?

- When, where, and how do they access that data? (i.e. where are they in their workday when they need data? At a strategic meeting? Before an important presentation? Working remotely or on-the-go?)

- How often do users need access to data on an ad hoc basis? What data are they looking to access ad hoc?

- How often do they require more comprehensive reports or create custom dashboards? What data are they looking to include in these reports and dashboards?

- What are the other user personas your solution caters to? Could these other user groups benefit from improved and intuitive access to data? (i.e. default dashboards that can be easily customized, conversational options that allow them to ask questions and receive data responses)

- What level of data literacy do your user groups currently have?
    - What level of data literacy do potential new users have? (e.g. front-line workers, executives and management in non-data-related roles, assistants or interns etc.)

- What types of reporting and analytics tools are users already familiar with?

- What are the main complaints or requests you receive about the current level of data accessibility and reporting options available within your system?

Step 4: Define Requirements for a New Data Access Tool

At this stage, you'll want to begin to tie your ideas about the data access tool (or tools) you're considering implementing to your high-level business objectives. You need to answer:

- What will this tool do for our users?
- In turn: what will this tool enable us to achieve as a business?

Before exploring the market for the right data access tool for your software, you need to have an idea of what ROI you should expect so you can assess which tool meets as many of your needs as possible at a good price that fits the needs of your business.

Because building out or integrating new data access solutions will have long-term impacts on your team and your business success, take your time with this step to get clear on your objectives. Look for a solution that's built to fit or be adapted to your unique business rather than compromise your needs to align with the capabilities of a specific solution.

Here's a few requirements you can consider as you define your use cases and how to solve them. You might want to consider whether the solution:

- Offers all the components you need to create a complete solution
  - Does it have front end components such as widgets or a user interface you can white label, or will you have to build that in-house?
  - Is there other architecture you would have to build out to integrate the solution with your own software seamlessly?

- Allows you to provide or enhance mobile data access

- Meets your customers' and users' data visualization, reporting, and presentation needs
  - Dashboards have flexible formatting options with the ability to change the type of data visualizations quickly (e.g. from a bar graph to a heat map)
  - Reporting workflows make data accessible as quickly as possible and reports offer comprehensive information users can act on
  - Visualizations reduce users' cognitive load and make it easy to understand the information at hand

- Seamlessly integrates with your database and offers excellent database coverage
  - Is any data preparation work required from your team?
  - Does the solution allow users to get information from all relevant tables in the database? Does it allow them to join data from different tables?

- Facilitates customization for your unique set of use cases and is flexible enough to solve for different use cases as you scale in the future

KEEP IN MIND

Requirements aren't just about the solution's features, they're also about the support the provider offers, how they facilitate the implementation process, ease of integration, and the provider's ability to be in alignment with your vision.

Take into consideration whether the vendor offers customized demos, free trials, complementary proof of concept (POC), and collaboration processes throughout the development and deployment stages, and beyond.

Step 5: Selecting the Right Data Access Tool

Once you've defined your requirements, you're better equipped to consider these non-negotiables in your vendor exploration process. Having defined what you expect to achieve with the implementation of new data access functionality, you can measure potential options against those goals.

In this section, we'll talk a little bit more about the types of data access solutions that are available, and the merits and challenges associated with each. This is far from comprehensive, but it will give you an idea of the types of solutions that might be most suitable for your users and make the most sense for your business.

Reporting, Dashboards & Analytics

When it comes to data access, most users are familiar with data visualization tools, which is an umbrella term we'll use here to refer to things like charts, tables, graphs, and lists.

Most of the time, data visualizations are shown in dashboards that allow users to see several important metrics at once. Most BI tools are dashboard-centric: they allow users to monitor their data and create meaningful visualizations that help them see trends, opportunities, and potential roadblocks.

> **Robust BI tools might be powerful, but their complexity comes at a cost: to get the most out of these tools every user needs to be a power user.**

Some tools allow users to customize their own reports or dashboards, while others offer out-of-the-box standardized templates that synthesize only high-level KPIs.

Similarly, reports offer a snapshot of data at a specific moment in time, often providing a regular or scheduled summary of important metrics. But reporting can also refer to the process of extracting information from the database that might not be readily available in a default dashboard or an existing report.

These are ad hoc requests that require further analysis or a call to their technical team: a user needs specific data that they can't access via their dashboards or reports, and the technical team has to manually run that report for them.

Robust BI tools might be powerful, but their complexity comes at a cost: to get the most out of these tools, every user needs to be a power user. This necessary upskilling prevents true democratization of data, perpetuating data siloes and failing to close the gap between business users and their data.

Another drawback is that the sheer volume of visual information presented to users can contribute to cognitive overload and make it harder for users to move through workflows and find the data they need on an ad hoc basis.

Conversely, pre-built analytics tools make for easy onboarding and adoption for users at all levels of data literacy and technical skill. However, by providing out-of-the-box or default settings, users are only enabled to access and analyze the metrics that the provider has set up. This prevents them from doing the deeper exploratory analysis that's possible with a BI-grade tool.

The tool or solution you choose needs to make data access available to as many types of users as possible, while making their experiences headache-free and ensuring that they are able to easily find and use the data they need to make decisions.

Conversational AI for Database Access

With a conversational AI-backed solution for database access, you can either introduce new functionality or augment the existing reporting and analytics capabilities in your software. Through Chata's API, providers can access the power of AutoQL: a robust system that enables the dynamic translation of text to SQL, so that anyone can query a relational database and receive immediate answers, simply by asking questions in natural language.
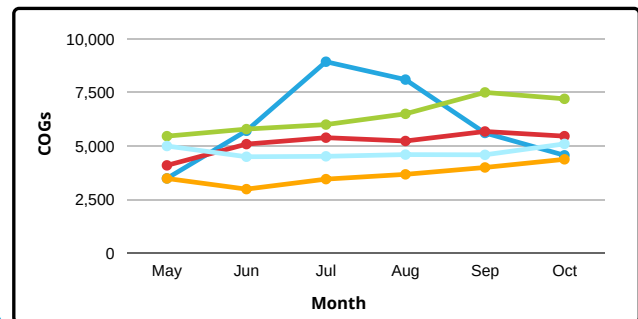
Deliver data on demand with AutoQL.

With AutoQL, software providers can save time and labor by creating the data access features their customers and users demand. AutoQL's end-to-end system includes

proprietary text-to-SQL translation technology, flexible front end widgets, and conversational AI-driven machine learning models that facilitate seamless user experiences. With AutoQL, SaaS providers can quickly build and deploy high-value data access features, charge more for their solution, and earn business from new types of users.

For customers and end users, this kind of solution blends the zero learning-curve nature of pre-built reporting and analytics tools with the slice and dice and data exploration capacities of a powerful BI tool, reducing cognitive load and promoting efficiency in data-driven workflows.

With conversational AI for database access, users can just ask questions in their own words to search for the data they're interested in and do so from anywhere within your software interface. They can even easily build out dashboards without needing to learn how to set up parameters, understanding how to combine dimensions, or figuring out how to navigate a series of complex dropdown menus and filters.

You can learn more about AutoQL [here](.).

Step 6: Activating & Implementing a New Solution

Once you've chosen the right technology or tool, it's time to take next steps towards implementing the new solution within your own software. Depending on the solution you've chosen, different tasks and resources will be required of your team.

It's important to enter this stage in the process with the following elements mapped out so you can project plan effectively:

1. Ensure Alignment: Ensure that all members of the implementation team you've established are clear on the high-level goals of the implementation, their roles, and that they understand the priority use cases.

2. Define & Communicate Scope: Clearly define the work required from each team member and articulate how their key activities tie to the larger scope of the project. This step can include:

- Understanding technical requirements, noting what architecture or processes your team will need to build vs. what is supplied to you by the chosen vendor
- Developing customer validation requirements and what customer success will be measured by for this implementation
- Outlining the go-to-market strategy and potentially scoping for marketing work and timelines that will need to run parallel to the technical implementation process
- Defining when the priority use cases are "solved for" i.e. what does it look like for the implementation to be successful?

3. Identify Milestones: Identify key milestones that will be achieved throughout the implementation process and map out timeframes required to execute each milestone. Schedule appropriate checkpoints and deadlines throughout your project timeline, and ensure each team member understands what key milestones they are responsible for.

4. Measure Success: Based on your priority use cases and the requirements for success that you outlined previously, determine the KPIs you will measure at each stage of the project to reflect the effectiveness of the customer validation process and, later, a beta testing stage, feature roll out and go-to-market, as well as user onboarding and adoption.

Iteration & Expansion

The right solution shouldn't just help you realize ROI as fast as possible, it should also make it easy for you to scale and drive more value over time.

Ideally, the vendor needs to be on board with your growth as your team innovates and discovers new use cases to solve for. The vendor should be dedicated to updating their systems regularly and the solution itself should be built to scale rapidly.

To set the stage for future development and ongoing success, ensure that the vendor can support you:

- What customer support does the vendor offer to you? Will you have a consistent point of contact with the vendor past implementation as you enter into growth and maintenance stages?

- Does the vendor offer robust resources you can access and leverage on your own terms? (e.g. Developer Docs, Developer Portal(s), FAQs, resource libraries, how-to videos)

- Does additional support come at an extra cost to you? (i.e. what types of technical issues might your team have to handle in the future if the vendor doesn't offer that type of support?)

- Are there opportunities to co-innovate and explore new use cases with the vendor?

Assess whether the solution itself is flexible enough to scale and adapt to your changing business:

- Is streamlined user onboarding baked into the solution, or will you need to build that out yourself?

- Can your team white label and easily iterate on any front end components to reflect your unique branding and user interface, at any time?

- *(Depending on the type of solution you choose)* Is the API accessible and well maintained on the vendor's side? OR Is the application/software system updated on a regular basis?

- Are those updates well-documented and communicated effectively?

Summary

Exploring the "buy" route when deciding on how to add value to your solution takes time and careful consideration. The solution you choose should be able to meet your needs today, and be adaptable as you scale your offering, continue to build out new features, and optimize your user experiences.

Employing a conversational approach to data access and leveraging dynamic text-to-SQL translation is new ground in the technology sector, but the projections point towards major opportunities for growth.

Over the last few years, plenty of evidence has surfaced that shows the impact conversational technology has already had on the way we do business in a digital world. Between 2019 and 2020 alone, chatbot usage in the B2B space increased by 92.5%, reflecting just how willing users are to engage in conversational experiences, and how quickly this is becoming not only the new norm, but also the new expectation.

The process outlined in this guide is designed to help you make a selection that not only helps you drive revenue and accomplish key business outcomes, but also reduces the strain on your team's time and expensive labor in this era of digital transformation.

Interested in AutoQL?

AutoQL is a complete end-to-end system that allows you to deploy and scale new data access functionality in your software solution.

We ensure that our AI offers unparalleled database coverage and can handle the questions your users ask, however they ask them. Through our API, you can take advantage of our AI and build freely with our flexible front end widgets that include:

- **Data Messenger**, our conversational user interface for querying databases
- Customizable **Dashboards** that anyone can build using natural language
- Natural language-driven **Data Alerts** even non-technical users can configure

Explore AutoQL

Our team is here to support you at every stage, from discovery to expansion, handling your priority use cases from day one and exploring new opportunities for growth as you scale your integration.

You're welcome to explore AutoQL for your [industry or software solution type](#) and check out Data Messenger, Dashboards, and Data Alerts in action to see how conversational AI for database access can work for you.

We hope you found this guide valuable in your decision-making processes. Feel free to submit feedback to our team at chata@chata.ai.