

InsightRocket

Insight Rocket for Tableau

Insight Creation & Delivery Platform



With Insight Rocket, tell
rich, timely, personalized
data stories to everyone.

Empower all those who
may be too busy for
dashboards.

What comes after dashboards?

Much of your potential audience is too busy to explore via dashboards.

Subscribing them to static vizzes isn't effective.

Handwritten data stories are ideal, but often too time consuming.



The Solution

Insight Rocket tightly integrates with Tableau to efficiently engage your full audience with personalized data stories.

Deliver just-in-time insights in Excel, PowerPoint, Teams, Google Sheets, portals, and more.



Enterprise Software for Tableau

Insight Creation

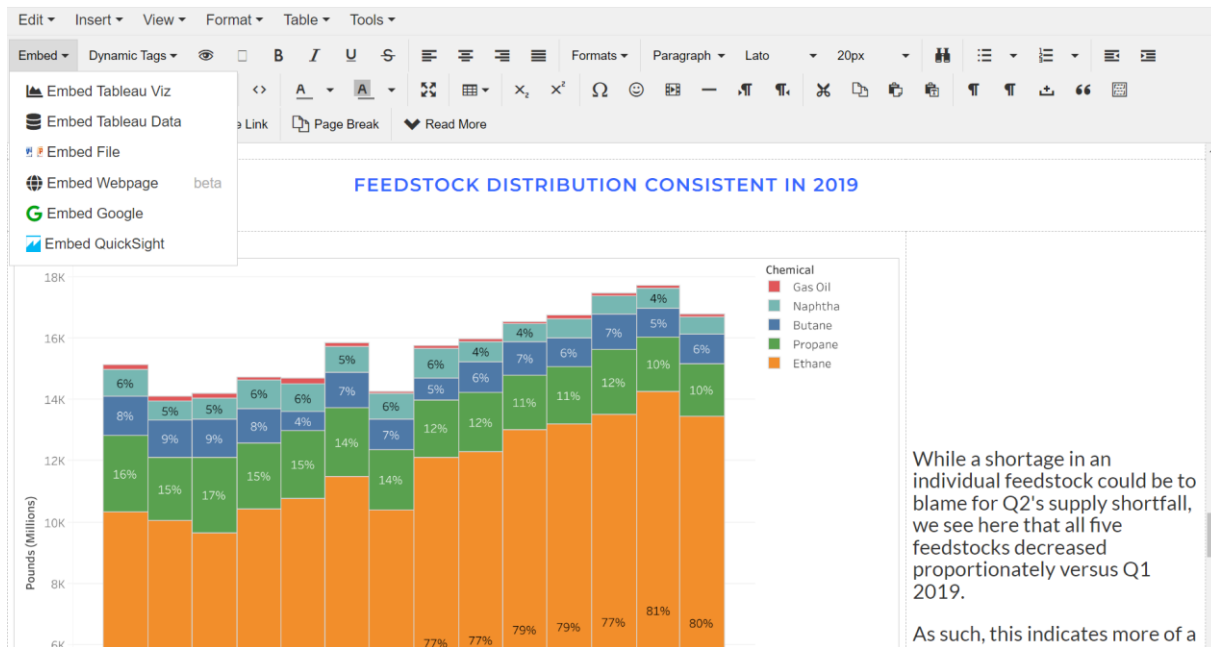
- + Real Storytelling
- + Autofocus
- + ChatGPT for Tableau

Insight Delivery

- + Smart Subscriptions
- + Data-driven Bursting

Five powerful capabilities you can flexibly combine to engage your full audience.

Real Storytelling



- Weave together any content in a data-enabled, full-featured story editor.
- Optionally add automation, with or without GPT-4.

Autofocus

Achieving insight without interactivity requires anticipating audience questions and drilling down on their behalf.

Autofocus achieves this by dynamically cloning and filtering sections of a story for each of that moment's top items based on your rules.



ChatGPT for Tableau

The screenshot displays the InsightRocket interface. At the top, there are navigation tabs for Home, Stories, and Dashboards, along with a search bar. Below the navigation, a dashboard header shows various metrics: West (2), \$1,124, 9, \$562, \$324, and 28.8%. The main content area features a GPT prompt: "Write a brief summary of customer activity for the account representative John Jones focusing on data for last week but putting into the context of the data for the past three years and all account reps. Particularly focus on changes between last week and the week prior to that. State all profit ratios as percentages. Omit suggestions for future improvement. GPT INPUT". Below the prompt, a "Preview Story" window is open, displaying the generated summary. The summary includes an overview, performance for the last week (Central, East, South, and West regions), and a comparison with the previous week.

GPT PROMPT Write a brief summary of customer activity for the account representative John Jones focusing on data for last week but putting into the context of the data for the past three years and all account reps. Particularly focus on changes between last week and the week prior to that. State all profit ratios as percentages. Omit suggestions for future improvement. GPT INPUT

John Jones sales activity for past three years

Data Table: Regions - 3 Years

John Jones sales activity for past week

Data Table: Regions Last Week -

John Jones historical sales activity for past three years

Data Table: CustomerOverview Week

Sales activity for the past week for all account representatives

Data Table: Orders LW All - Sales Rep

Activity by John Jones's customer for past three years

Preview Story:

Overview:
John Jones has shown a notable performance in the past week across various regions, with significant changes in profit ratios compared to history spanning three years and the performance of other account representatives.

Performance Last Week:

- **Central Region:** Achieved a profit ratio of 25%, a substantial increase from the historical average of -2%. This is a significant improvement, especially compared to the overall profit ratio of 15% for all account representatives in this region last week.
- **East Region:** Recorded a profit ratio of 7%, which is lower than the historical average of 12% for this region. This performance is slightly below the profit ratio of 12% for all representatives in the East last week.
- **South Region:** Posted a profit ratio of 22%, which is higher than the historical average of 16%. This performance is above the average profit ratio for all representatives in the South last week.
- **West Region:** Demonstrated a profit ratio of 29%, which is an increase from the historical average of 19%. This is also higher than the average profit ratio of 22% for all representatives in the West last week.

Comparison with Previous Week:

- **Central Region:** There was a significant increase in the profit ratio from the previous week, where the profit ratio was much lower.

- A deep, flexible integration between GPT-4 and Tableau Server or Cloud.
- Full control over prompts and data inputs spanning vizs.
- Fully automated, or with editorial review before publishing.

Smart Subscriptions

- » Editable PowerPoint
- » Multi-tab Excel
- » Google Sheets & Docs
- » Email (with open metrics)
- » Branded web portals
- » Slack & Teams
- » PDF

Print Email Slack SHEET DOC XLSX PPTX PDF

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Just-in-time, conditional delivery based upon your data rules.

Data-Driven Bursting

InsightRocket
INSIGHT ROCKET (DEMO)

Home

Stories

Dashboards

...

Search

@ Distribution Table: Yesterday Customers

Zuschuss Donatelli,

Thank you for your recent order and for being a customer since 1/1/22! For your convenience, here's a summary of all of your order activity with us to date. We hope to serve your needs again soon.

Year of Order	Date	Sales
2022	1/1/22 to 12/31/24	\$1,000
2024		\$0

Aaron Hawkins

Profit Ratio: -50.0% to 50.0%

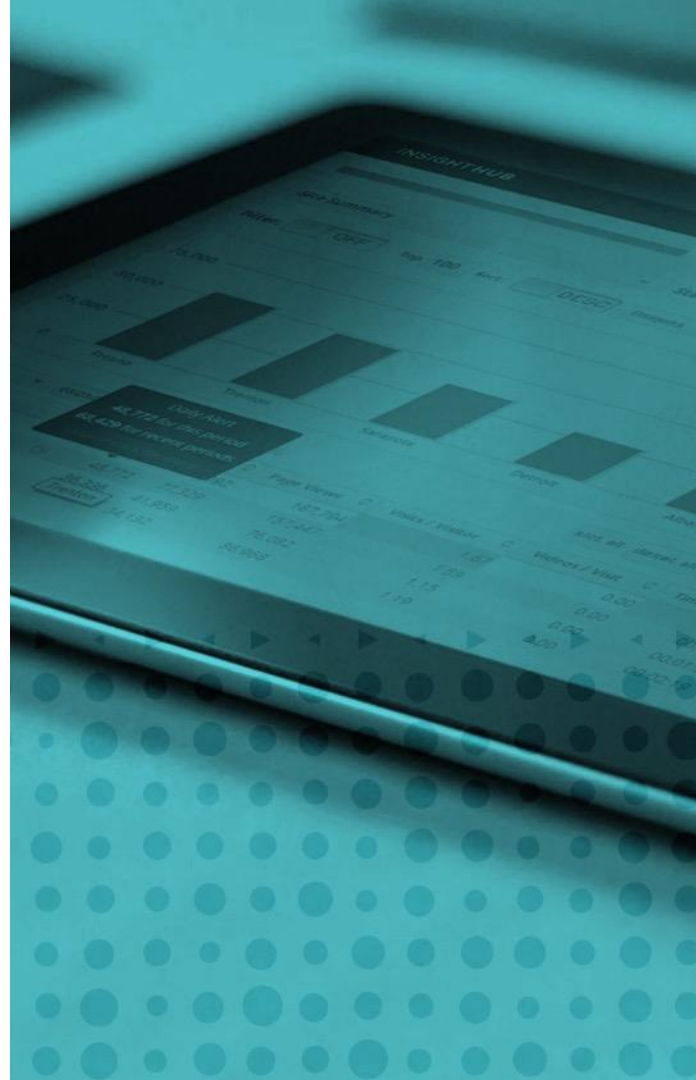
Orders: 1, 2, 3, 4, 5

Category: Furniture, Office Supplies

- Distribute to a dynamically sourced list of recipients and filters.
- Efficiently send personalized, just-in-time stories to anyone.

Multiply Tableau's Impact

- + Democratize Insight
Reach a far bigger audience
- + Personalize & Autofocus
Share just what they need to know
- + Deliver News
Timely insights are more valuable



THANK YOU

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