

Why Your BI Strategy Needs an AI Layer: The Case for QuaerisAI

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If you're like most of our clients, you've already invested real money in Power BI, Qlik, Tableau, or another enterprise BI platform. You have invested in data quality and data governance. You've built the dashboards. You've trained the analysts. And yet, when you look at actual usage numbers, something doesn't add up: most organizations see BI adoption stuck in the single digits to low double digits — often just 3% to 10% of licensed users actually opening a dashboard in a given week.

That's not a tooling problem. It's an access problem. Dashboards are built for analysts who know what question to ask and how to navigate a semantic model. But the people who actually run your business day to day — sales reps, supply chain coordinators, field teams, marketing managers — don't want to learn a new interface. They want an answer, the way they'd get one from Google.

This is exactly the gap that augmented BI platforms like QuaerisAI are designed to close, and it's why I've started recommending it to clients as a companion layer on top of the BI investment they already have — not a replacement for it.

What "Augmented BI" Actually Means

Augmented BI isn't another dashboard tool. It sits on top of your existing data stack — Power BI, your warehouse, your documents — and lets everyday business users ask questions in plain English and get an instant, explainable answer, complete with the underlying chart or source citation. No ticket to the BI team. No waiting for a report to be built. No new dashboard to maintain.

The important distinction for clients who already have Power BI or Tableau: you don't need to choose. Platforms like QuaerisAI are explicitly built to work alongside advanced BI tools, handling the high-volume, low-complexity questions your operations, sales, and marketing teams ask every day. In contrast, your BI team stays focused on the deeper, more strategic analysis dashboards are actually good at.

Where This Pays Off: High-Value Use Cases

1. Sales and go-to-market enablement. Sales teams historically rely on dashboards to track pipeline health and performance, but adoption is often low because the dashboards are simply too complex for a rep to self-serve during a live deal. Embedding natural-language search directly into a CRM lets reps

ask for pipeline data, lead flow, or campaign performance on demand. In practice, this kind of shift has driven measurably higher engagement, fewer support tickets, and renewed trust in the underlying data — because the interaction model changes from "navigate a dashboard" to "ask a question."

2. Embedded analytics for SaaS products. For software companies that need to give their own end users a self-service analytics experience without building and maintaining a custom BI layer, QuaerisAI's search-first interface can be embedded directly into a product or mobile app. One property management SaaS provider replaced a costly third-party dashboard tool this way — cutting licensing costs while increasing mobile engagement and customer retention, since users got instant answers with zero training required.

3. Document intelligence alongside structured data. A lot of the "data" your teams need to answer a question doesn't live in a warehouse — it's buried in contracts, SOWs, MSAs, and PDFs. QuaerisAI's document intelligence capability lets users query unstructured documents the same way they query structured data, with source citations and version control so that a single natural-language question can pull from both a database and a contract at once.

4. Operational monitoring where early signal matters. In a higher-education deployment, a university used the platform as a near-real-time layer for tracking student retention and faculty effectiveness signals, catching risk patterns early enough to intervene. The result was a retention rate consistently above 91% — a good illustration of how augmented BI shines when the value of an insight decays quickly if it isn't acted on within days, not weeks.

The ROI Case

The financial argument for adding an augmented BI layer generally comes from three directions:

- **Underused licenses become productive.** If your organization is paying for BI seats that 90%+ of employees never touch, the marginal cost of extending simple, governed access to those employees is far lower than the cost of the unused licenses themselves. Vendors in this space report lifting practical BI adoption from the typical 3–10% range up toward 30–60% by giving non-technical users a way in that doesn't require training.
- **Analyst and BI team time gets reclaimed.** Every ad hoc "can you pull me a number" request that a business user can now self-serve is time your analysts get back for higher-value modeling and strategic work, rather than one-off report generation.
- **Faster decisions compound.** When the time between "I have a question" and "I have an answer" drops from days to seconds, the compounding effect shows up in things that are harder to put a single dollar figure on but matter enormously: faster deal cycles, earlier intervention on at-risk accounts or students, quicker course-correction on underperforming campaigns.

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None of this requires ripping out what you already have. That's the point. Augmented BI tools like QuaerisAI are designed to sit atop Power BI, Qlik, or Tableau, working within your existing governance and security model so the dashboards your analysts built keep doing their job. At the same time, the other 90% of your organization finally gets a way to ask a question and get an answer.

Where to Start

If you're a Visual Data Group client sitting on a BI investment that isn't getting the adoption you expected, this is worth a conversation. We'd recommend starting small — pick one high-friction use case (sales pipeline questions, a support-heavy report, a document-heavy workflow) and pilot an augmented layer there before rolling it out broadly. The goal isn't a platform migration. It's making the data you already have finally usable by the people who need it most.

Interested in exploring whether an augmented BI layer makes sense for your organization? Reach out to the Visual Data Group account team to talk through a pilot.