

A man with long, wavy brown hair and a beard is sitting outdoors, smiling. He is wearing a red and blue plaid button-down shirt. The background is a blurred wooden building with a blue sign on the left.

sage

# Sage View Analytics Improvements

Adriene Schrotter

2016

**Data Analytics : How would our user's find it useful?**

# Investigate what is relevant to our users



## As a Business Owner.

- How would I prefer to keep up to date on the health of my business?
- How frequently would I want to be notified or contacted?
- Would I want to self initiate my own analytics and reports?
- How comfortable would I be with setting up data to run the analytics?
- How often do I update my accounting data?
- Would I prefer an accountant/consultant to set up the data in my behalf and offer advisory services and insights?



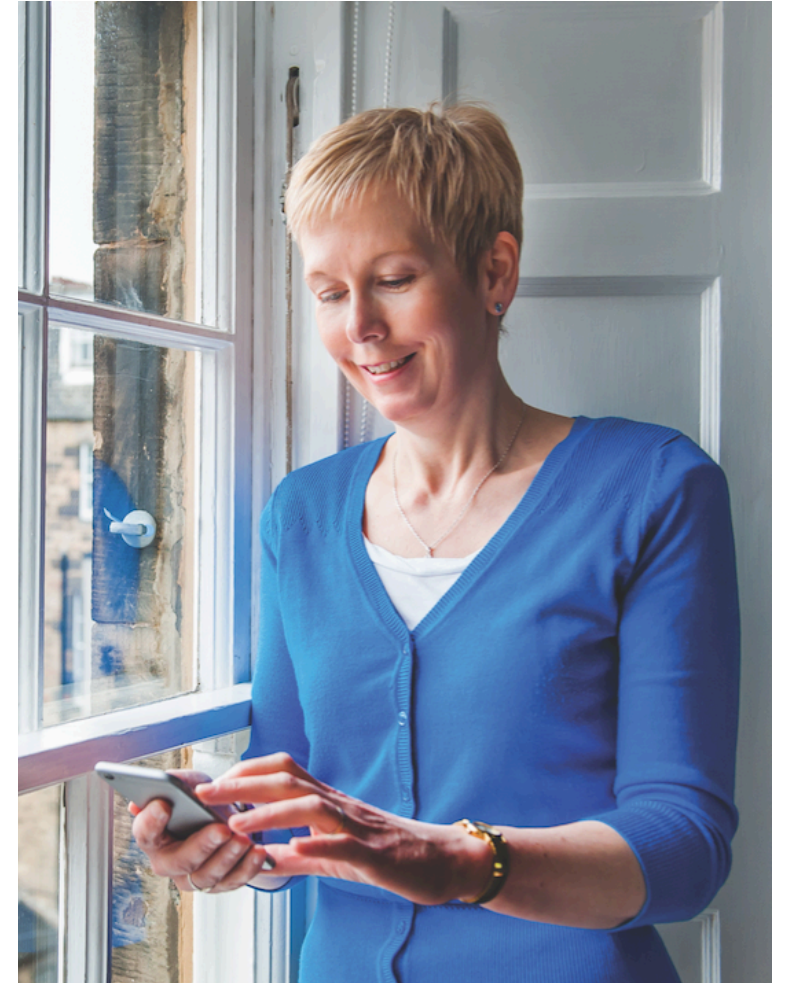


# Investigate what is relevant to our users



## As a Accountant.

- How would I prefer to communicate with clients about their business?
- Am I working more on mobile devices?
- Do I see the value in advisory services?
- How comfortable with technology?
- How often do I update my accounting data?
- How often would I want to check in on my clients and their data?



# Data Analytics : Telling the story

# Investigate ways to communicate data in a simple and impactful way.

## The three types of Comparison

1. Metric Comparisons deliver a concise view of the relationships between two metrics over time.
2. Target Comparisons provide a way to view actual performance of any KPI against established targets.
3. Historical comparison give an insightful view of how a metric or KPI performs over time.

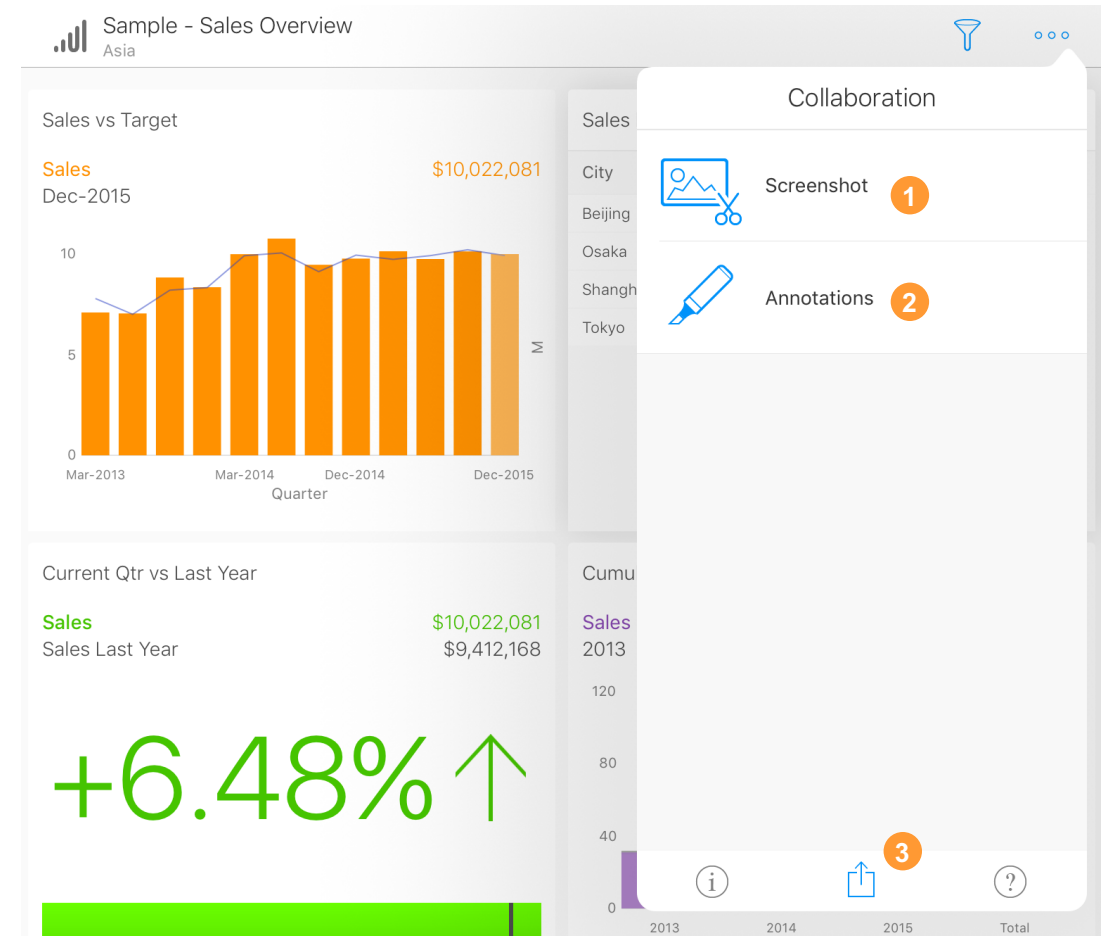


# Investigate ways to collaborate and share.



## Possible ways to collaborate and share

1. Email a screenshot, with notes.
2. Add Annotations and share a link.
3. Create a monthly report.



sage

# Examples

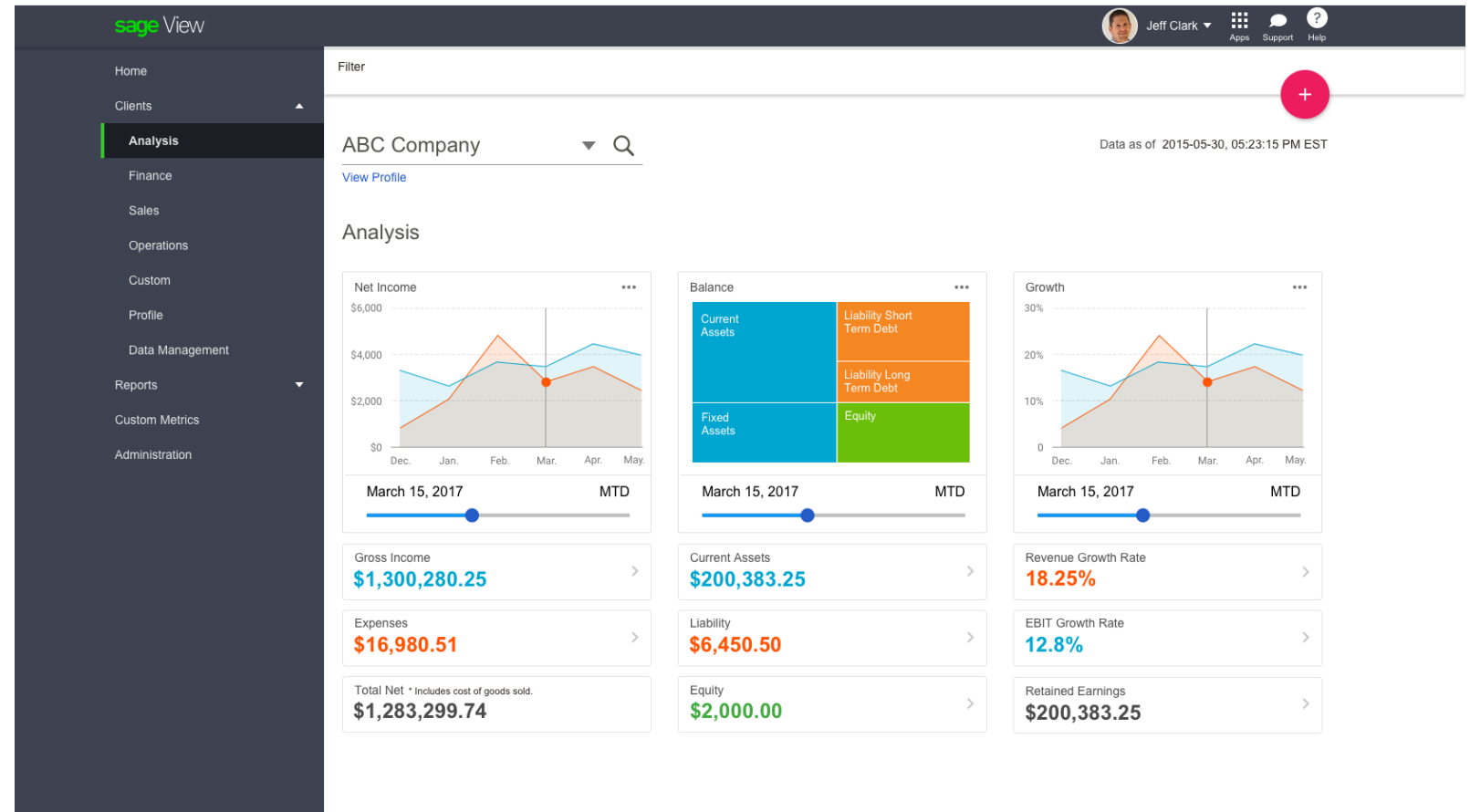
The experience from Desktop, Tablet to Phone



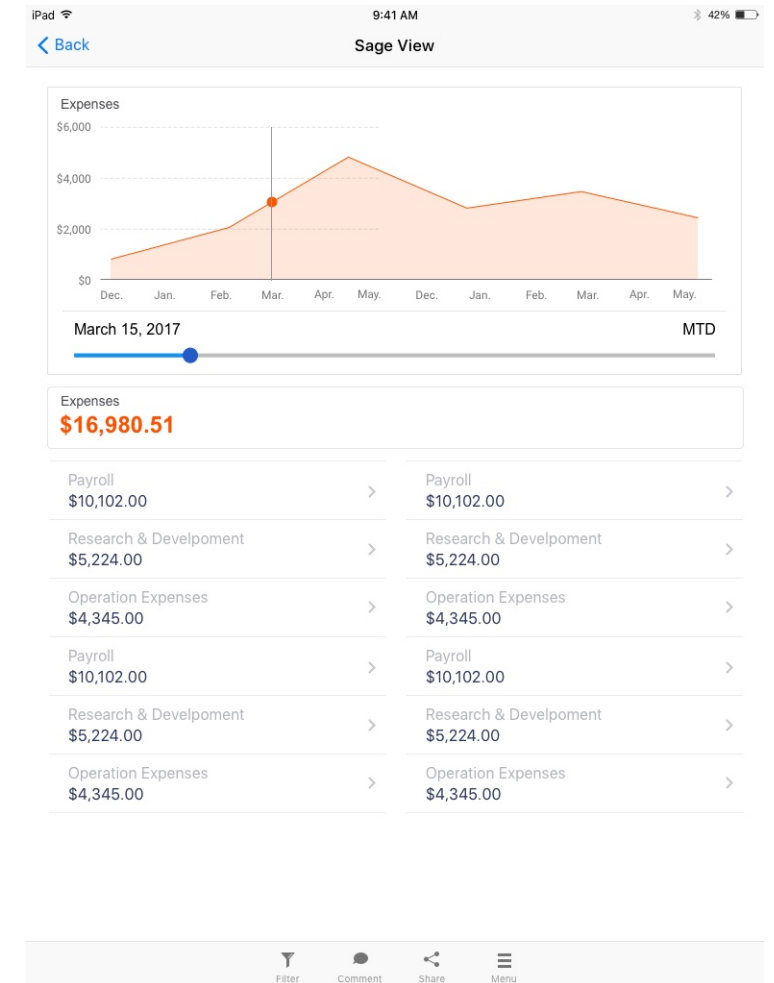
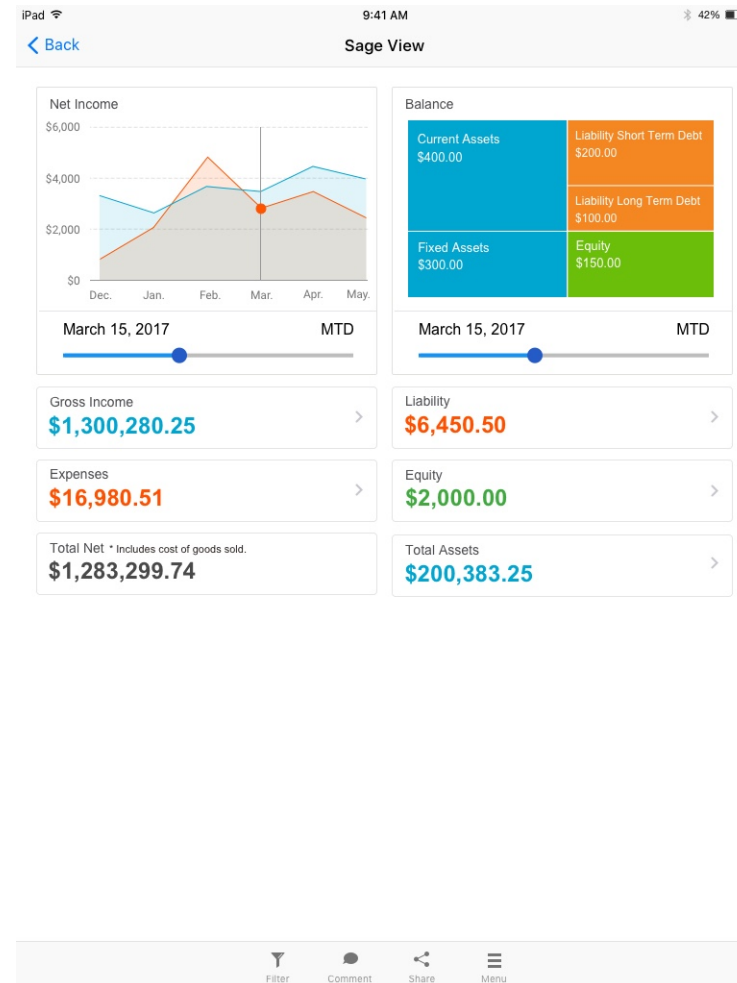
# Desktop



- Scalable content cards.
- Real-Time interactions.
- Using Metric Comparisons, Target Comparisons, and Historical comparison.



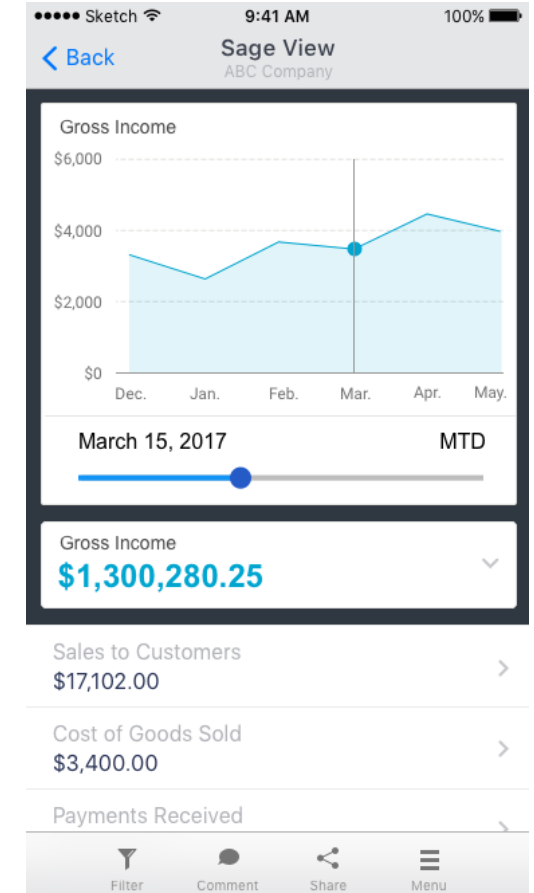
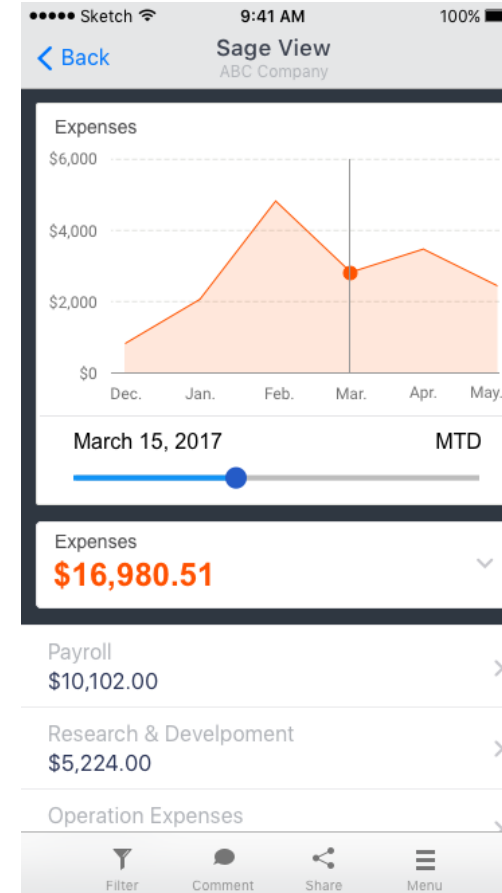
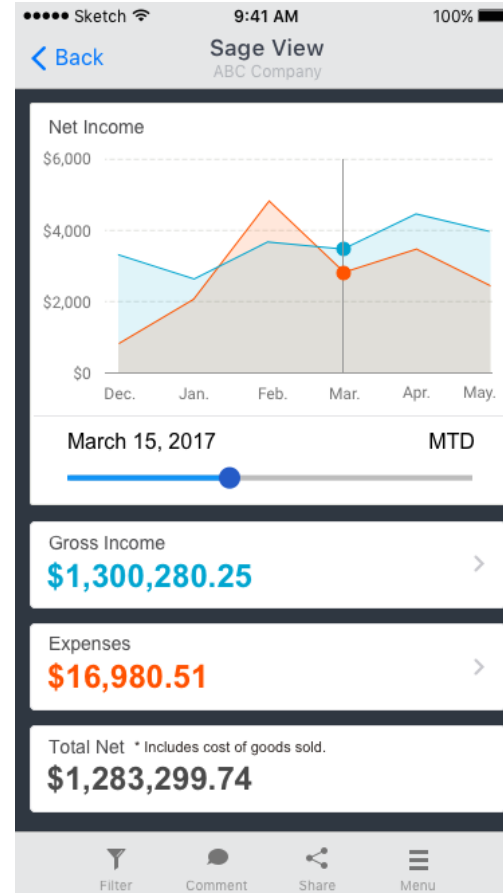
- Scalable content cards.
- Adapting the best experience for device type.



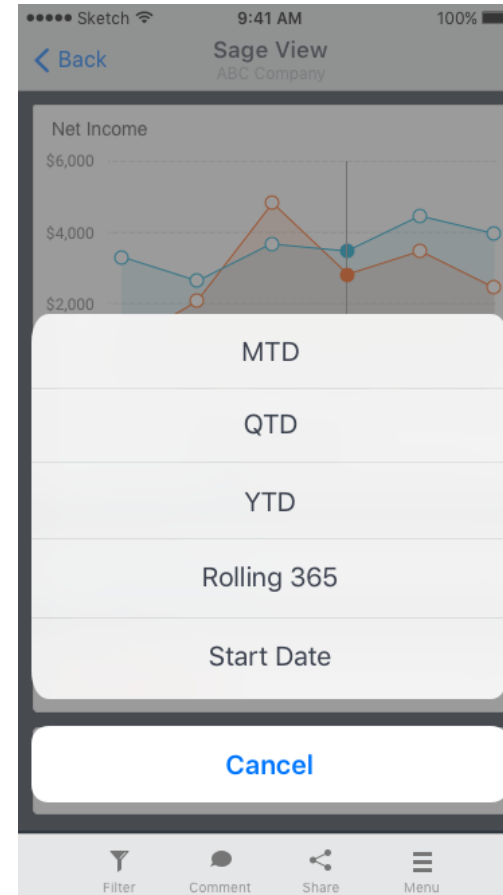
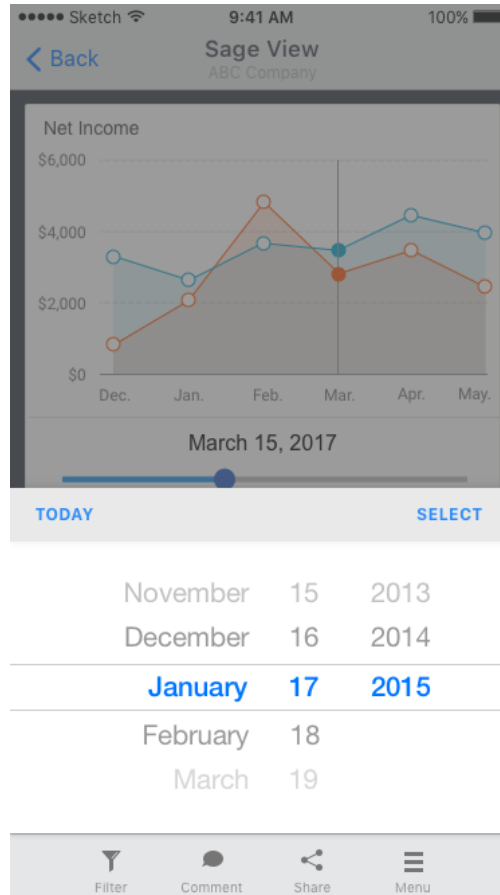
# Mobile



- Let the content tell the story



- Filtering through content examples.



- Possible voice commands
- Items that would be important to customers and simplifying tasks or finding information that fits into a mobile experience.

