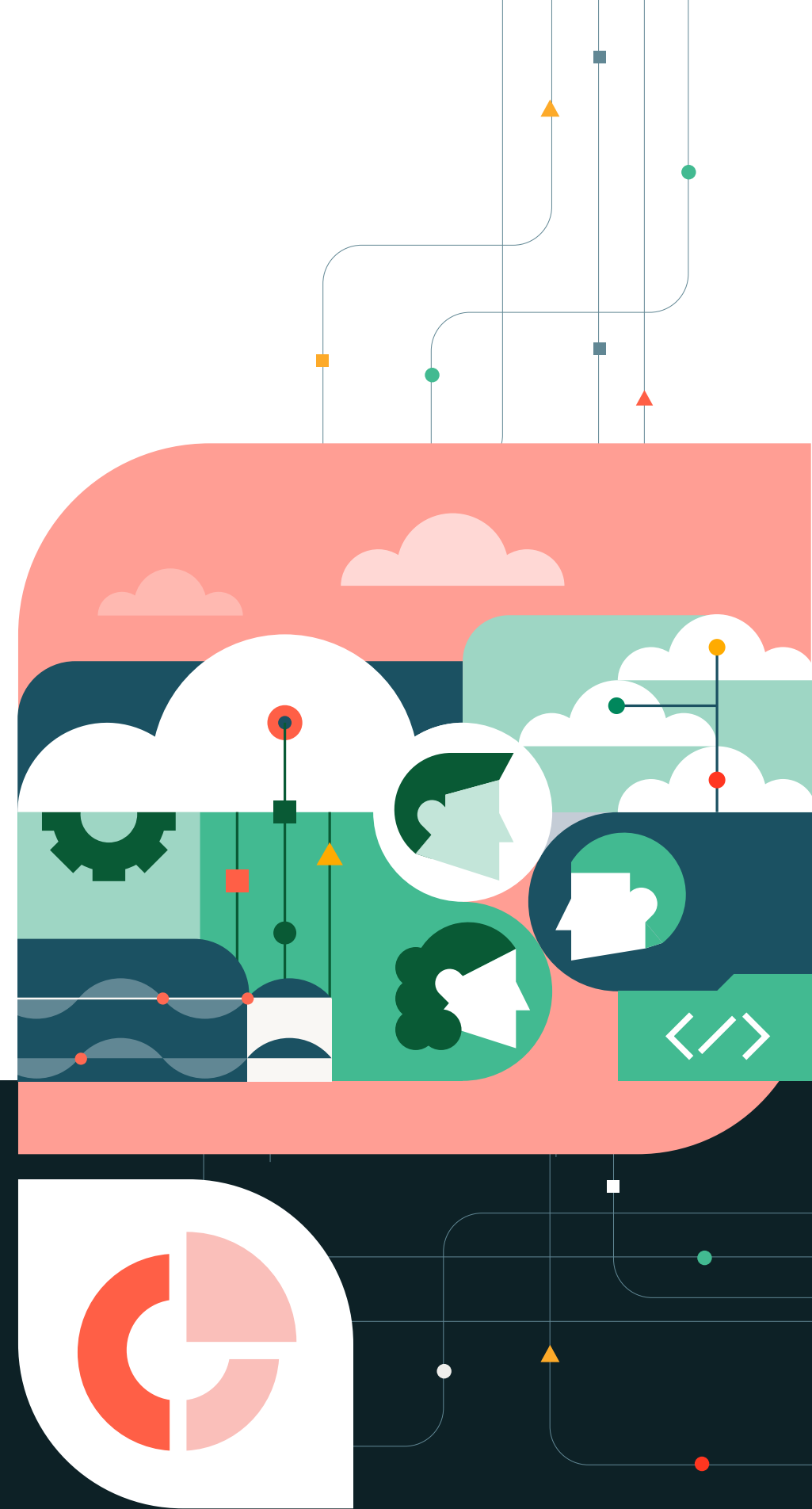
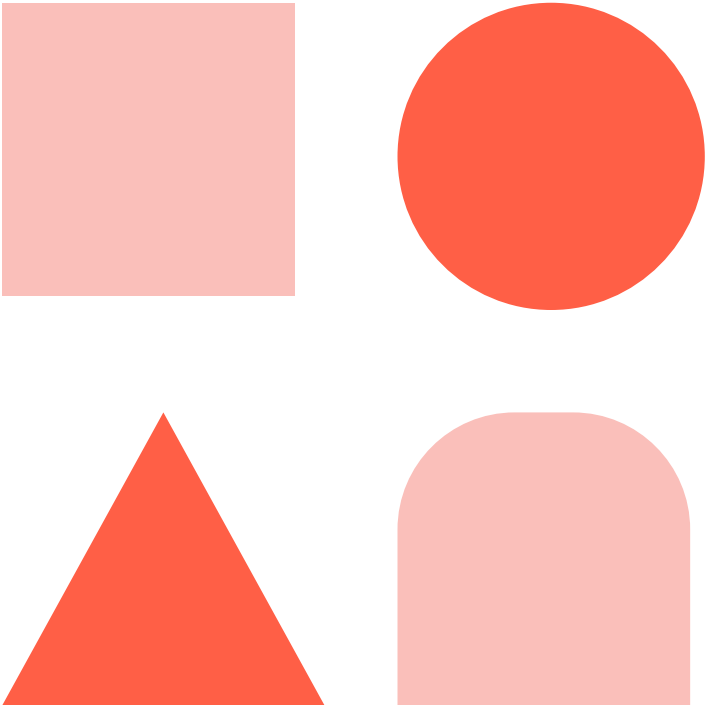


From Dashboards to Decisions in Minutes

How Genie helps tech and AI-native
companies in the agentic era



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Executives are rethinking business intelligence

Your CFO needs the forecast variance story behind a Q1 miss before tomorrow's board call. Your product team just spent three sprint cycles trying to understand why a new AI feature isn't converting. Your VP of Growth needs two days to answer a question about a campaign she launched last week. Your engineering leaders are waiting on a data pull to understand what changed in last night's deploy.

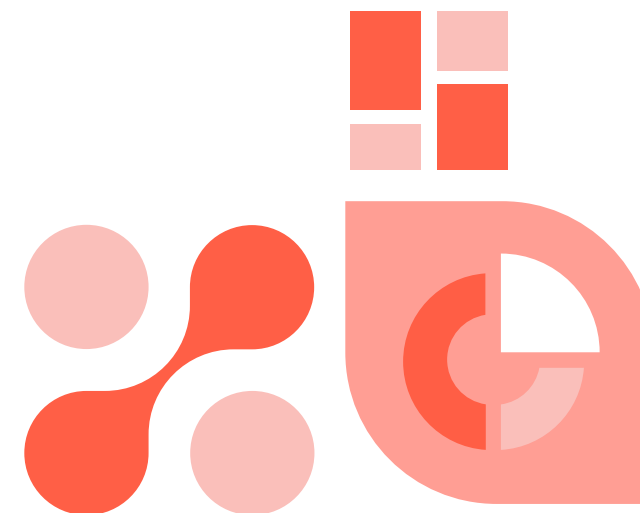
And while AI tools are becoming standard at tech companies, very few deliver answers to executives, product leaders, go-to-market (GTM) teams, and frontline builders when they actually need them. AI is often stuck in specialist workflows or pilot programs. Most business leaders and practitioners are still waiting at the back of a data request queue when they need a governed answer mid-decision.

Traditional bolt-on "AI for BI" tools summarize dashboards but can't see across the business. Tech companies shipping weekly need more than that.

Legacy business intelligence (BI) architectures assume teams will anticipate their most important questions months in advance, building dashboards on a fixed release schedule. That assumption breaks down in tech, where a single product launch, pricing change or model update can rewrite which metrics matter within days.

Traditional bolt-on "AI for BI" tools summarize existing dashboards but can't surface context across your business, don't share business definitions with the data models your engineers maintain and often operate on copied or stale data disconnected from your production environment. For teams shipping AI features and making real-time GTM calls, slow reporting becomes a competitive liability.

Genie is designed to close this gap. It lets teams across the business — Finance, Product, GTM, Customer Success, Engineering and the executives running them — interact with governed data in plain English and receive auditable, trusted answers in seconds, often inside the tools they already use, like Slack or Microsoft Teams.



Genie for tech companies

Genie is a conversational analytics assistant powered by Databricks. Users ask questions in natural language and receive answers as narrative explanations, tables and visualizations, and can ask follow-ups in the same conversation. Genie is included with **Databricks SQL**, with no separate BI license or additional tool to procure.

Unlike generic chatbots, Genie learns from your organization's governed data and how your company defines growth, product performance, risk and customer behavior. It draws on:

- **Unity Catalog**, a unified, open governance layer for your data, AI models and business metrics
- Certified metrics, dimensions and business definitions that reflect how your teams measure success
- Query history and existing analytics assets — dashboards, notebooks and the questions your analysts already answer regularly
- Example questions, instructions and user feedback that refine responses over time

Behind the scenes, specialized agents interpret questions, identify relevant data and metrics, generate queries and return clear explanations and visualizations. When a question is ambiguous, Genie asks for clarification, and it keeps conversational context so users can refine their thinking naturally.

All interactions occur within a governed environment, giving teams one trusted conversational interface for analytics that connects to the data they already work with.

Deep integration with Unity Catalog:

- ➔ Row- and column-level security ensure users only see the data they are authorized to access.
- ➔ It uses the same certified metrics and definitions that dashboards and SQL queries also use, so key business terms mean the same thing everywhere.
- ➔ It logs every question and answer for audit, giving security, compliance and data governance teams a complete trail of how insights were generated.

Real-world use cases across tech

AI-native product companies

AI-native companies with core products powered by AI are under pressure to move fast without sacrificing data discipline. Executives, product managers, ML engineers and growth teams all have urgent questions, but data teams have fixed capacity. Genie provides a conversational layer over governed product data, so every team can get answers without queuing a request.

Use case	User type	Natural language query examples	Benefits
Product analytics for AI features	Product managers, growth leads	"Which cohorts converted after we shipped the new recommendation model last month?" "Show me seven-day retention by feature adoption tier for users who activated in Q1."	Product teams get immediate answers to questions that would previously require a data and AI team sprint, and can follow the analysis wherever new questions lead.
Model performance monitoring	ML leads, VP Engineering, data scientists	"How did our content ranking model affect engagement by user segment this week?" "What is the false-positive rate for our fraud detection model by geography over the last 30 days?"	Engineering and ML teams detect performance regressions without waiting for scheduled review cycles and communicate results directly to leadership in the same conversation.
Infrastructure cost intelligence	Engineering managers, finance business partners	"What percentage of our compute spend is tied to experiments with no active users in the last 14 days?" "Show me inference cost per active user over the last quarter by model version."	Leaders explore cost drivers on demand and make resourcing decisions from current data rather than last month's report.

Customer Spotlight

The Trade Desk turns advertising-platform data into self-service insights with Genie

CHALLENGE

As demand for data grew across product, engineering and marketing teams, traditional dashboards and manual analysis created bottlenecks. Dashboards could only answer a fixed set of predefined questions, leaving teams to submit custom analysis requests or build one-off reports that were rarely reused. Decisions were often made on incomplete or outdated information, and validating a single client feature request could take weeks of manual data pulls.

SOLUTION

The Trade Desk deployed Genie on Databricks to give teams natural-language access to governed data. To handle tens of thousands of datasets across multiple product domains — including Connected TV, audience targeting, and geography — engineers built a Genie router on Databricks Apps that connects domain-specific Genie Spaces and combines results into a single response. Automated query validation and human review keep outputs trustworthy, and Genie connects to the BI department's shared repository of certified business definitions so every team gets the same answer for the same question.

RESULTS

Time to insight dropped by 95%, from days or weeks to seconds. The entire Genie solution requires less than half of one engineer's time per month, reclaiming thousands of engineering hours for high-value work. Product managers, engineers, marketers and senior leadership now query data directly to evaluate feature requests, validate business cases, and deprioritize low-ROI projects before they reach the roadmap. Usage spikes during high-stakes cycles like the company's annual conference, when teams self-serve the data behind keynote presentations and executive briefings.

SaaS and B2B software platforms

SaaS and B2B software companies are shifting from intuition-driven growth to AI and data-driven operations. GTM, customer success and revenue operations teams have critical questions about pipeline, churn and expansion, but most of that data lives in systems only the data team can query. Genie turns governed revenue and customer data into a conversational surface for the teams closest to the business.

Use case	User type	Natural language query examples	Benefits
Revenue intelligence	CRO, VP Sales, Revenue Operations	"Which customer segments show the highest expansion potential this quarter, ranked by ARR?" "How did our recent pricing change affect net revenue retention by cohort?"	Revenue teams explore pipeline and customer performance in real time and follow the analysis wherever the conversation leads — without opening a data request.
Customer health and retention	VP Customer Success, CS managers	"Which accounts show early churn signals based on product activity in the last 14 days?" "Rank at-risk accounts by ARR with last engagement date and primary use case."	Teams act on live signals rather than monthly health scores, with ranked outputs that direct attention to the highest-impact accounts.
Product-led growth analytics	Growth teams, VP Product	"Show me activation rates by sign-up source and plan tier this month." "Which in-app paths correlate most with conversion from trial to paid in the last 90 days?"	Growth teams answer conversion and funnel questions directly, reducing ad hoc data requests that previously consumed a significant share of analyst capacity.

Customer Spotlight

Atlassian embeds Genie into Rovo so every Atlassian team can query Databricks in plain English

CHALLENGE

In most organizations, the people who need an answer and the people who can write the SQL aren't the same. Product managers, marketers, support leads and finance managers wait for analysts. Decisions slip past the moment they could have been made. For a SaaS vendor like Atlassian — whose customers run on Atlassian's collaboration platform — the bar is even higher: data has to come to users inside the tools where work is already happening.

SOLUTION

Atlassian built the Databricks Query Runner, a Rovo agent powered by the Genie Conversation API and listed on the Atlassian Marketplace. Rovo is Atlassian's AI assistant for the Atlassian platform; the Query Runner makes Genie the engine inside it. Any team member can ask a plain-English question of governed Databricks data and get an auditable answer without writing SQL or filing a request. Atlassian's enterprise security wraps the experience, and Genie's Unity Catalog grounding keeps definitions and access controls consistent.

RESULTS

Product, marketing, support and finance users on Rovo can now query Databricks data in the moment, inside the tools where decisions are actually getting made. Atlassian also surfaces the capability as a marketplace product, extending Genie's reach to any organization running both Databricks and Atlassian. The pattern itself is the proof point: a major SaaS vendor chose Genie as the natural-language engine for their own enterprise AI assistant.

Consumer tech and marketplace platforms

Consumer tech and marketplace companies generate high volumes of data from user behavior, supply-demand dynamics and platform operations. Executives and frontline teams need current context to make decisions, but building a new dashboard for every new question doesn't scale. Genie provides a governed conversational layer over production data so leaders get answers at the pace the business moves.

Use case	User type	Natural language query examples	Benefits
Growth and engagement intelligence	CMO, VP Growth, Head of Marketing	"How did our new onboarding flow affect 30-day retention by acquisition channel?" "Show me DAU trends by market and device type over the last 90 days."	Marketing and growth leaders query campaign and product performance without waiting for the next analytics review and drill into drivers and outliers in the same conversation.
Marketplace supply and demand analytics	VP Product, Head of Operations	"Which markets show the largest gap between supply and demand this week?" "Where are conversion rates declining fastest in the purchase funnel by geography?"	Operations teams get real-time supply-demand visibility that feeds directly into market decisions, prioritization and partner conversations.
Executive platform health reviews	CTO, VP Engineering, Chief Data Officer	"What's our platform uptime and p95 latency by service compared to last month?" "Show me support ticket volume and CSAT scores by product area over the last quarter."	Engineering and executive teams run platform reviews from governed, current data — without requiring an analyst to assemble the view.



The pattern repeats across all three segments: governed data lands directly with the people closest to customers, product and growth.

Evidence that the pattern works

Tech companies are already seeing results from Genie

- **Zillow** deployed Genie as the self-service analytics layer across its internal organization of 1,500+ active monthly users. Dashboard build time dropped from days or weeks to under an hour.
- **The Trade Desk**, a global advertising technology company, deployed Genie to give product, engineering, and marketing teams natural-language access to governed data across tens of thousands of datasets, cutting time to insight from days or weeks to seconds. The entire routed Genie solution is maintained using less than half of one engineer's time per month.
- **Kraken**, the AI-powered operating system behind utilities including EDF, E.ON, National Grid, and Tokyo Gas, embeds Genie into the platform it offers utility clients. According to Kristy Mayer-Mejia, Kraken's Global Head of Data Transformation, Genie is "accelerating [clients'] time to get started by weeks or more" because users can explore data without needing it modeled to the rigid structure traditional BI tools require.
- **nCino**, a cloud banking platform provider, used Genie to expand data accessibility across its organization, giving executives, analysts, and customer-facing teams direct access to 13+ years of loan lifecycle data that previously sat behind technical specialists.

These results change more than reporting speed. They move data access from a bottleneck managed by a small technical team to a capability available to everyone who needs it.

Genie brings three key features to tech in a single experience:

1 GOVERNED DATA CONTROL

Operate on governed data with a single control plane

2 CONSISTENT BUSINESS LOGIC

Reuse shared business semantics rather than creating new definitions per tool

3 ACCESSIBLE INSIGHTS

Give every team — from the CFO and Finance to Product, GTM, Customer Success and Engineering — the same natural-language access to data that the data team has

Getting started with Genie in tech

1 Start from the conversations that matter

Identify recurring questions executives and teams struggle to answer quickly, such as:

- Product questions about feature adoption, cohort behavior and activation rates
- Revenue operations questions about pipeline health, churn signals and expansion potential
- Finance and CFO questions about forecast variance, margin drivers and spend by business unit
- Engineering questions about platform cost, model performance and incident patterns

These conversations define the first Genie Spaces your organization should build.

2 Establish trusted business definitions

Next, ensure the metrics that matter most are defined centrally. Using Unity Catalog Business Semantics, tech companies can:

- Standardize calculations for key product and revenue measures: MAU, DAU, trial conversion rate, NRR and churn rate
- Certify the dimensions teams rely on: product lines, customer segments, feature tiers and geographies
- Associate those definitions with the datasets Genie can access

This shared semantic layer ensures consistency across dashboards, reports and conversational analytics.

3 Launch a few high-impact workflows

Rather than experimenting broadly, focus on several lighthouse use cases:

- **AI-native product companies**
Model performance monitoring / product cohort analytics
- **SaaS and B2B platforms**
Revenue intelligence / Customer health and retention
- **Consumer tech and marketplaces**
Growth and engagement intelligence / Executive platform health reviews

Track improvements in decision speed, user adoption and reductions in ad hoc reporting requests.

4 Build governance into the rollout

From day one, build governance and evaluation in to accelerate the rollout:

- Reuse existing data access policies so Genie never bypasses Unity Catalog entitlements
- Enable audit logging so security and compliance teams can review usage
- Encourage user feedback to continuously improve response quality

Organizations that implement strong evaluation frameworks often move more AI projects into production because they can demonstrate control and transparency.

5 Scale with business ownership

As early Genie spaces prove their value, expand to additional teams:

- Business owners define the questions, decisions and outcomes that matter.
- Data and analytics teams curate the underlying datasets and semantics.
- Security and compliance teams validate that policies and logging meet their standards.

Together, they transform Genie from a reporting shortcut into the standard way teams interact with data.

See how your teams can move faster with Genie

Genie turns governed data into decisions in minutes. Across tech and AI-native companies, teams from Finance and the C-suite to Product, GTM, Customer Success and Engineering are cutting reporting cycles and getting answers in seconds by putting data directly into the hands of everyone who needs it.

Speak with our industry experts to learn how Databricks helps your teams move from dashboards to decisions in minutes.

[Try Genie Today →](#)

