INTELLIGENCE EVERYWHERE: THE PLAYBOOK

MicroStrategy®
Intelligence Everywhere

MicroStrategy 2021™ delivers the complete enterprise platform, tools, support, and services your organization needs to achieve *Intelligence Everywhere*. To help guide and accelerate your journey to this viable outcome, this playbook means to serve as your trusted resource. Equipped with MicroStrategy's proven technology and technique, your destination is now within reach as detailed in this step-by-step approach.

Step 1:
Deploy HyperIntelligence® Today

Congratulations! You've already completed the heavy lifting for Step 1. Your organization has invested in IT and analytics and collected and analyzed data. But with limited adoption, your teams aren't getting the true value out of your data.

You're ready to deploy HyperIntelligence—which can be deployed faster than you think. With MicroStrategy's new SaaS offering, *Hyper.Now*™, we made it easy and simple to quickly bring the power of HyperIntelligence to your team or organization. Sign up, and within minutes you can start building and deploying HyperIntelligence Cards customized for your employees, vendors, or customers.
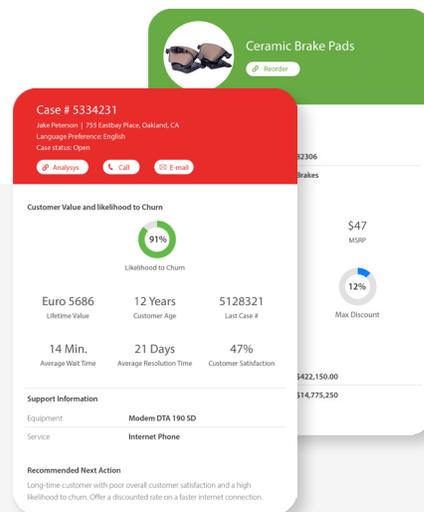
Start your free 90-day Hyper.Now trial at
www.microstrategy.com/hyperintelligence

What is HyperIntelligence?

In 2019, MicroStrategy invented a new solution for a conventional problem in the analytics industry. Until then, effectively delivering the *last mile* of analytics to people, when and where they need it, had been an insurmountable challenge.

Called HyperIntelligence, MicroStrategy revolutionized existing business processes by delivering real-time insights directly into applications, emails, websites, and mobile devices people use every day to do their jobs. Users could simply hover over important customer, product, or account names to surface real-time descriptive and prescriptive analytics, along with links to transactional systems that trigger data-driven actions.

Since its launch, hundreds of MicroStrategy's enterprise customers have initiated HyperIntelligence deployments—making it one of the most popular innovations in the industry over the past decade.

For a detailed look at HyperIntelligence, and to browse a video library showcasing features, capabilities, and use cases, visit www.microstrategy.com/hyperintelligence

Step 2:
Get Your Business Intelligence Library

Now that you've deployed HyperIntelligence, you're ready for the next step. You have all the dashboards that you need to help inform your decisions, but in a time crunch, finding answers isn't as easy as it should be. Step 2 is to set up your organization's Business Intelligence Library—a single place where you can instantly see all the dashboards and HyperIntelligence Cards you need. You're ready for **MicroStrategy Library™**, our viewing client that enables your organization's decision makers to view Dossiers and Documents so they can take action, fast.

Library is available on the Web, on Mobile, and new with MicroStrategy 2021—the **MicroStrategy App**. This desktop application, available for PC and Mac, brings all the dashboards and cards you trust into one single place. All your Library content is automatically updated and synchronized to your device, so it takes just milliseconds to see the insights you need, whether online or off.
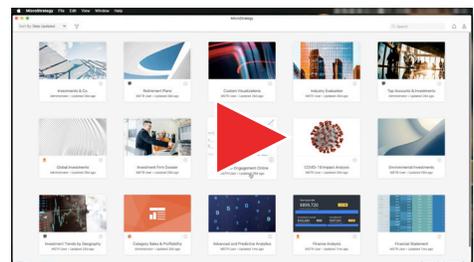
Download the MicroStrategy App **from the 'Desktop Applications' product category and connect your environment.**

Learn more about the MicroStrategy App:

Don't have an environment yet? **Request a free demo environment**

What is Library?

Organizations suffer from data-deprived decisions simply because decision makers lack quick access to the dashboards when they need to make informed decisions. With MicroStrategy Library, business users can curate a personalized selection of analytical content to refer to easily whenever they need it.

Users simply add Dossiers or Documents to their Library, then click into content as needed. Filter data to get a more specific view, create bookmarks to return to later, collaborate with team members, and export or share content across mediums—amplifying the power of data. We've worked to ensure your content looks great across all devices, so analysts can simply build once and deploy everywhere.
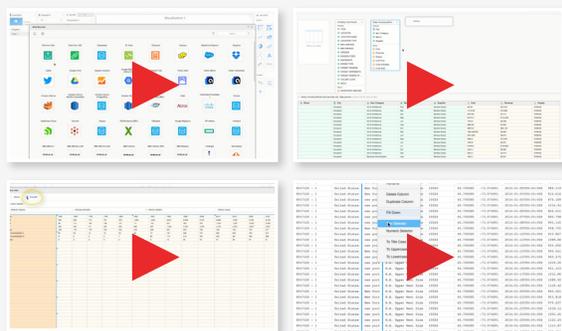
Step 3:
Empower Everybody to be an Analyst

Why should data-driven decision making be limited to your analysts and data scientists? Digital transformation has the power to arm everyone with the ability to make better, smarter decisions. For example, turning employees in Finance from number crunchers to business partners—from data entry clerks to process owners.
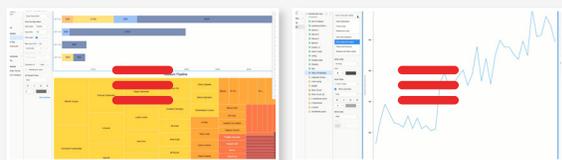
Exclusively available on the MicroStrategy platform, *Dossiers* empower everyone to be an analyst because they are easy to build with a drag-and-drop canvas, and their responsive design ensures that every dossier renders beautifully on any form factor—desktop or mobile.

Use these steps to bring the power of Dossier to your organization:

Use **Workstation** or **Web** to connect to your data:

Recommended **courses**:

110   **142**

Want to get the most out of your investment in analytics? Invest in an annual **Analyst Pass** to unlock tutorials and product demonstrations.

Build **grids/visualizations** that will become **pages/chapters** in your dossiers:

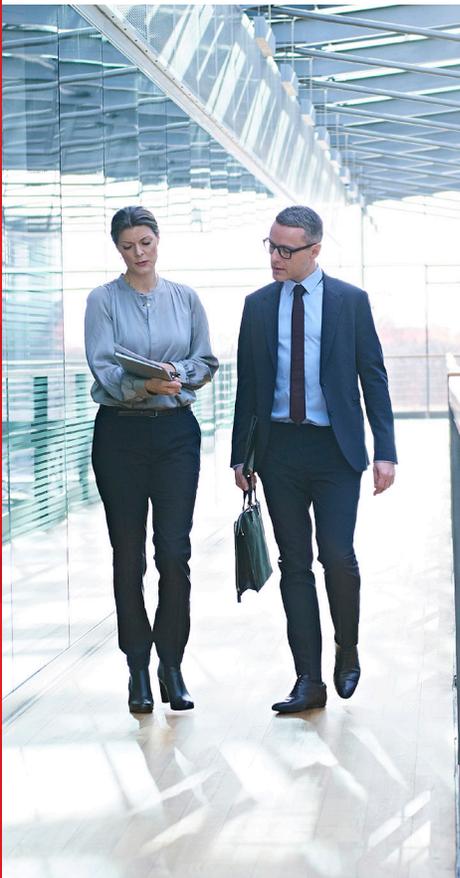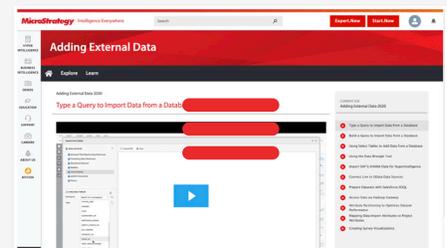Need help? **Browse our library** of video demonstrations:

Step 4:
Share with Everybody

It's time to empower users of other analytical tool with access to the same set of trusted data your organization uses for HyperIntelligence and your Business Intelligence Library. You have your data architecture set up, and you're ready to start analyzing it, but in place of the analytics options from Step 3, you want to use a tool or language of your choice—Excel, Python, R, Tableau, Qlik, or PowerBI, for example.

To do so, you would usually export the data, bring it into the tool of your choice, and analyze it as needed—but that manual process is not ideal to repeat, such as when data is updated or for real-time data. Step 4 is the proven solution by delivering federated analytics to all of your users across the enterprise, no matter what analytical tool they work in. Users can just log in with MicroStrategy credentials, select the data they need, securely pull that data into their preferred tool, then build an analysis on top of it. Data is easily refreshed—and always trusted and secured.

Build a cube of customer data that's relevant to all employees and publish it.

From the 'Federated Analytics' product category, **deploy** the following products to relevant users and connect them to the cube:

MicroStrategy for Tableau | MicroStrategy for Qlik | MicroStrategy for PowerBI
MicroStrategy for Office | MicroStrategy for Jupyter | MicroStrategy for RStudio

For additional information on how **Data Scientists** and **users of other analytics tools** can use MicroStrategy, visit the MicroStrategy Community.

Step 5:
Share with your Customers

Enhancing all of your user experiences and tools with trusted insights is the core of Step 5. As the recognized industry leader in Embedded Analytics, MicroStrategy is the proven solution to quickly deliver trusted, governed analytics into applications with its Embedding APIs. And in MicroStrategy 2021, we made the embedding experience even faster and easier to implement.

Embed Analytics into Web Applications and Portals

Directly embed the full suite of MicroStrategy functionality into any web application or portal. Publish dossiers or dashboards into white-labeled applications or other business apps including Salesforce, IBM WebSphere, Oracle WebLogic, Microsoft SharePoint, SAP Netweaver, and more.

Learn how in the following courses from MicroStrategy Education:

213 **215** **512**

Create White-label Applications and Customized Mobile Apps

Create dashboard applications that match any corporate brand. Include your logo, color themes, and branding with custom URLs, and maintain complete control over the end user experience.

For a mobile UX, seamlessly incorporate custom app icons, splash screens, and login menus. Design workflows that match your corporate brand and business needs. And easily publish to public or internal app stores to produce value-added services on any device.

Learn how in the following courses from MicroStrategy Education:

221 **521**

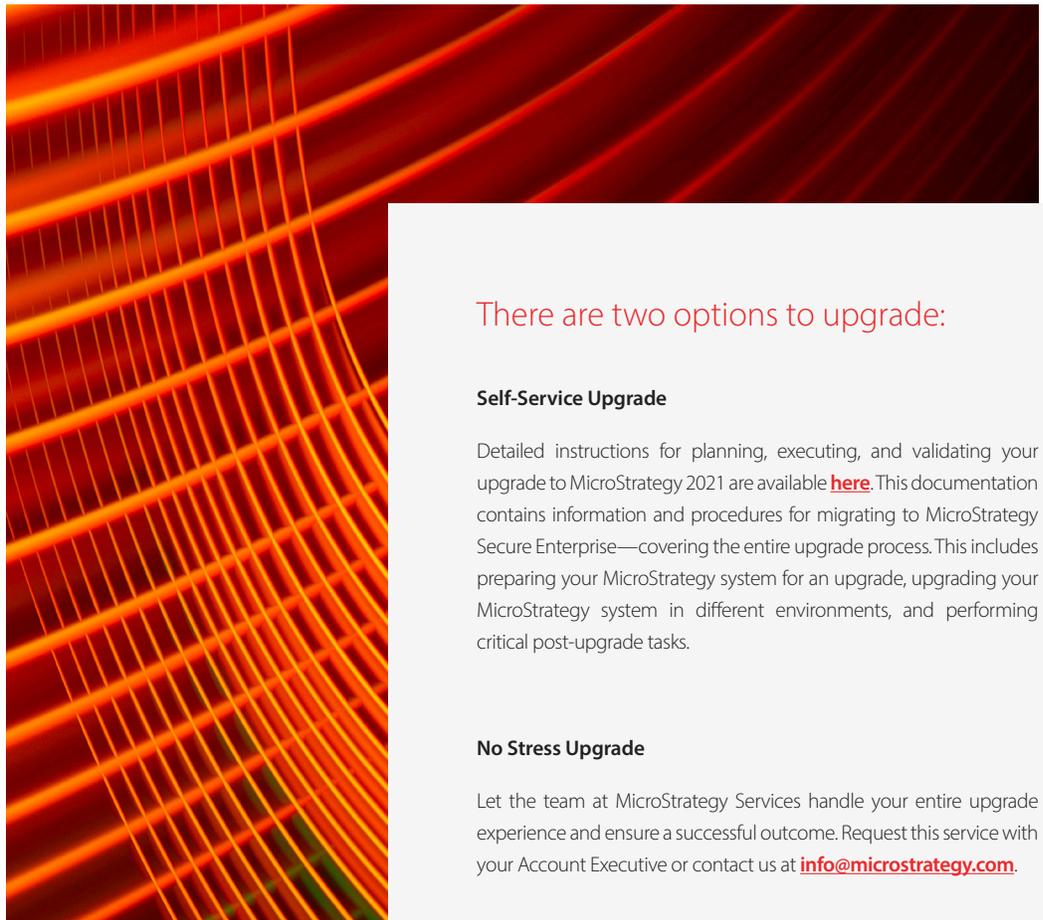**Interested in learning about OEM opportunities with MicroStrategy?**
Email our team at info@microstrategy.com

Step 6:
Upgrade to MicroStrategy 2021

MicroStrategy 2021 changes the way your entire workforce views and acts upon data with HyperIntelligence, consumes information at high speed in modern form factors with Library, builds content and easily administers your platform with Workstation, and embeds MicroStrategy into all of your mission-critical applications with our robust REST APIs and SDK.

We've built our data engine to be the most stable and efficient to date so you can leverage cloud, on-prem, and enterprise data at scale. In addition to these new capabilities and features, we have included a comprehensive set of Security upgrades to ensure compatibility with the latest standards and to make sure your most trusted assets are safe.

There are two options to upgrade:

Self-Service Upgrade

Detailed instructions for planning, executing, and validating your upgrade to MicroStrategy 2021 are available **here**. This documentation contains information and procedures for migrating to MicroStrategy Secure Enterprise—covering the entire upgrade process. This includes preparing your MicroStrategy system for an upgrade, upgrading your MicroStrategy system in different environments, and performing critical post-upgrade tasks.
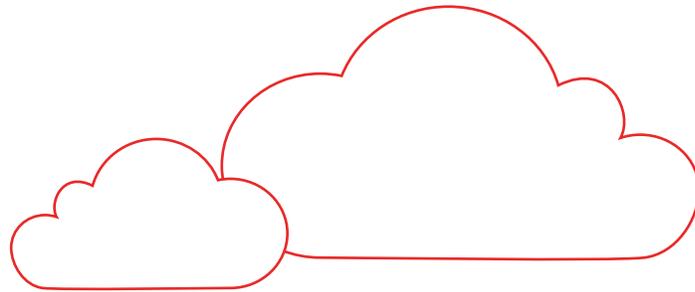
No Stress Upgrade

Let the team at MicroStrategy Services handle your entire upgrade experience and ensure a successful outcome. Request this service with your Account Executive or contact us at **info@microstrategy.com**.

Step 7:
Move to the Cloud

MicroStrategy 2021 is the only cloud-optimized solution that delivers *Intelligence Everywhere*. It's the fastest way to modernize your analytics investment, so you can build and deploy sophisticated applications with a high degree of agility—on an infrastructure that scales to meet the complex demands of your business.

To take full advantage of MicroStrategy 2021, our expert-managed platform-as-a-service solution offers industry-leading capabilities for enterprise analytics with an optimized cloud architecture, a fully managed and hosted infrastructure, and a best-in-class security posture. Our certified specialists work to ensure your organization benefits from the latest innovative features, architectural enhancements, and automation capabilities to maximize performance for all of your solutions. Freed from the day-to-day management of your system, your team can focus its efforts on building a stronger data-driven business.

Curious about what adopting our cloud will mean for you? Our experts will produce a comprehensive analysis of your cost savings and ROI on your behalf, and we'll deliver a no-risk migration that lets you experience our cloud service for yourself.

Contact your Account Executive or reach us at info@microstrategy.com to get started.