Strategy

Overview of Strategy AI and BI

Learning Path: AI-Enabled Business Intelligence

Strategy Education

Contents

1. **Accelerating Insights with AI**

Driving efficiency with AI in Strategy 4

Understanding subfields of AI: Leveraging LLMs to work more efficiently 8

Exercise: Readily access Strategy guidance and resources with Auto Expert 14

Universal Semantic Layer: Unlocking seamless insights and robust governance 21

Ensuring data security through governance, privacy, and encryption 22

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1

ACCELERATING INSIGHTS WITH AI

Driving efficiency with AI in Strategy

Welcome to the future of business intelligence—where Strategy unites enterprise-grade analytics with the transformative power of artificial intelligence (AI). As modern organizations seek solutions that are agile, secure, scalable, and cost-effective, Strategy delivers with a unified platform that puts advanced, intuitive analytics in everyone's hands.

Strategy's integrated AI capabilities empower every user—regardless of technical background—to effortlessly engage with data, unlock powerful insights, and make faster, more confident decisions. AI features are seamlessly woven into the Strategy platform, ensuring your business logic, object definitions, and calculations remain secure, customized, and instantly accessible. While BI ensures

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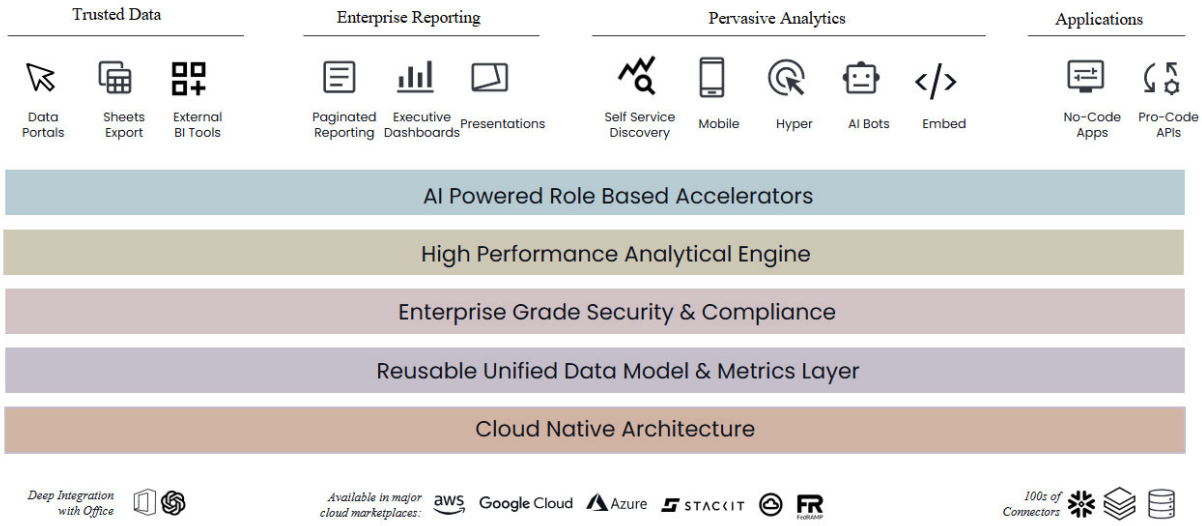
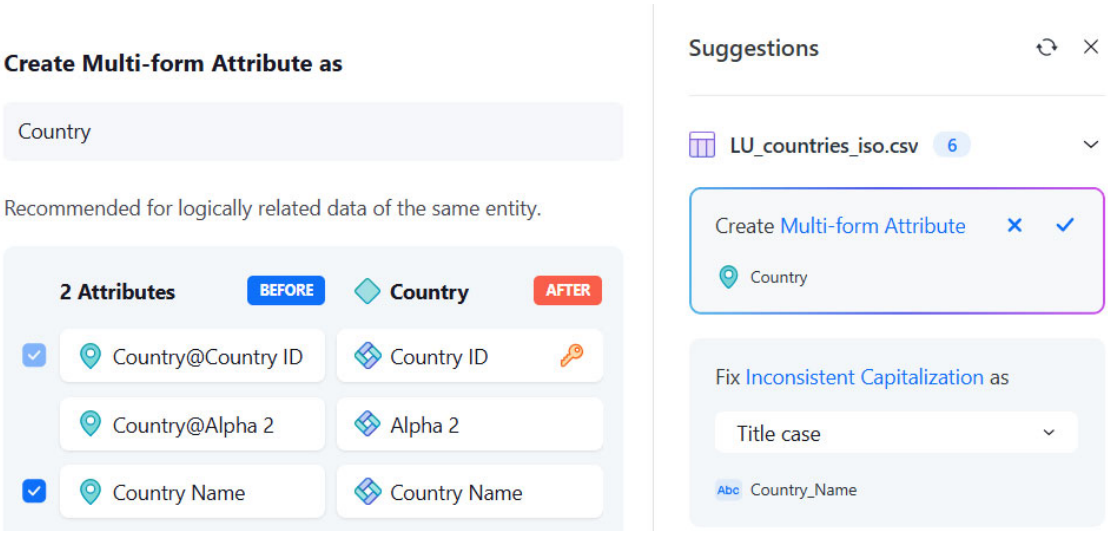
decisions are informed by your business's definitions and logic, embedded AI rapidly accelerates time-to-value and delivers unprecedented efficiencies.



Here's how Strategy's AI capabilities drive BI innovation and productivity:

- **Data modeling and preparation** with Mosaic Studio
  - Use AI-generated suggestions to enhance data preparation and intuitively build data models, streamlining complex tasks with intelligent automation.



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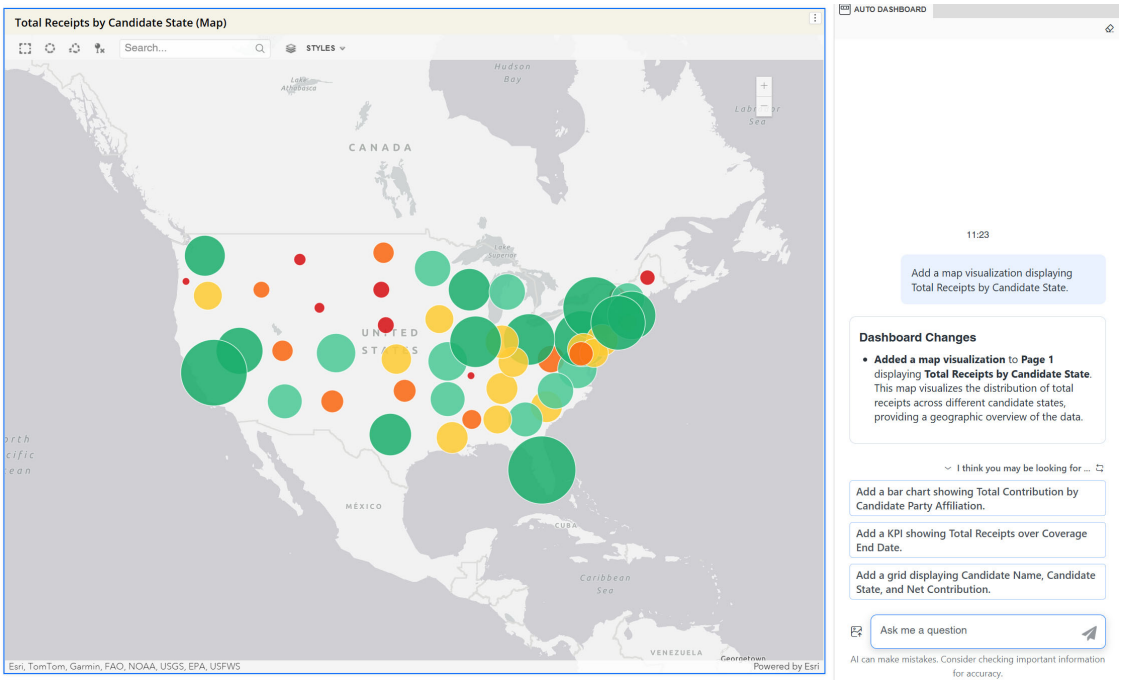
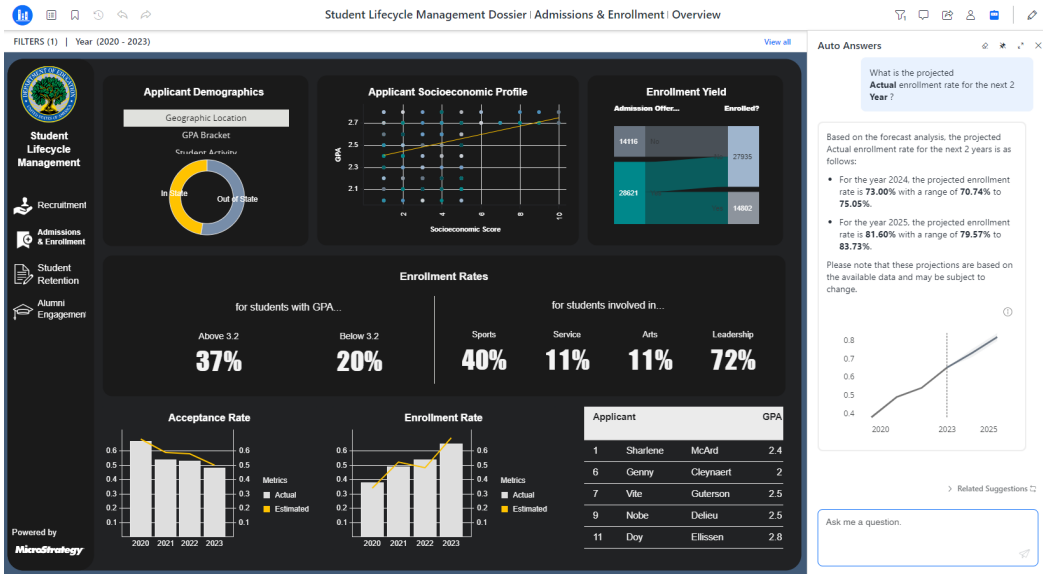
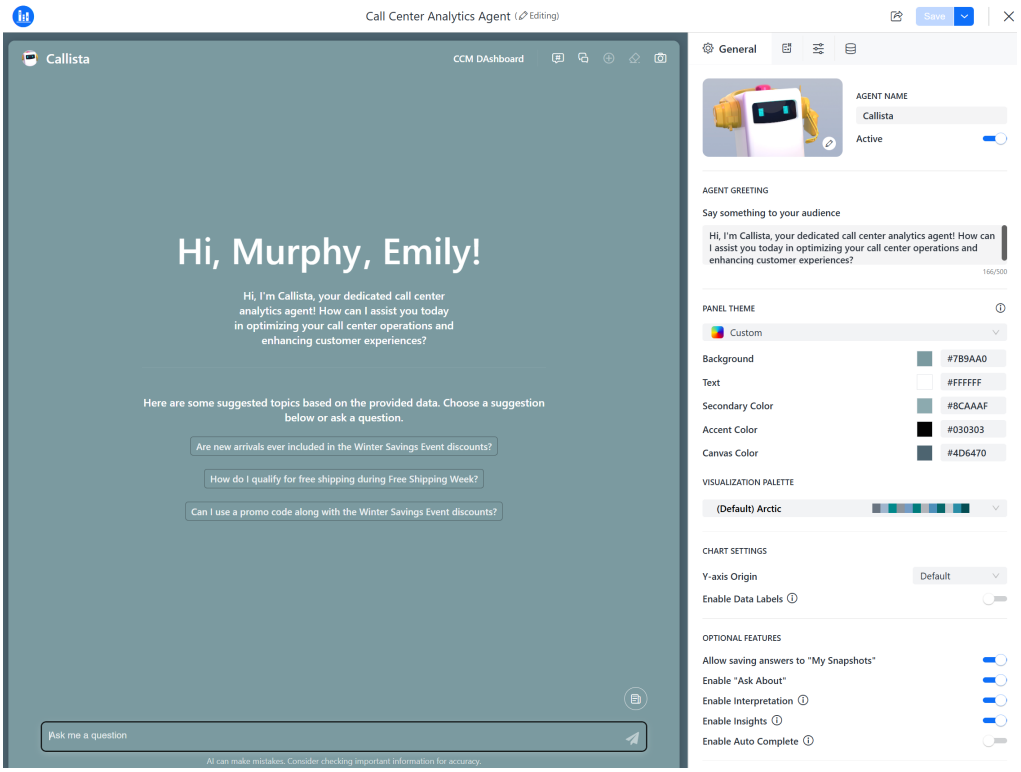
- **Content creation** with Auto Dashboard
  - Provide your data, and Auto Dashboard instantly generates compelling visualizations, dashboard pages, or chapters. Leverage Auto Narratives for AI-generated explanations that spotlight key insights.



- **Data exploration** with Auto Answers
  - Extend insights and self-service analytics with Auto Answers, a conversational AI agent integrated directly into your dashboards. Ask questions about your data and receive instant, context-rich responses.



- **Expanded data exploration and embedding** with Strategy's Agents
  - Build and deploy highly customizable AI agents across your applications, so anyone in your organization can access tailored, AI-powered insights exactly where they need them.



  - Connect your specialized AI agents in a Universal Agent, enabling them to collaborate and deliver clear, comprehensive answers so you can ask questions in one place and get everything you need with ease.

This course provides a high-level overview of how Strategy harnesses AI to drive efficiency, insight, and agility in business intelligence. To dive deeper into each AI capability, continue your journey through our AI-Enabled Business Intelligence learning path.

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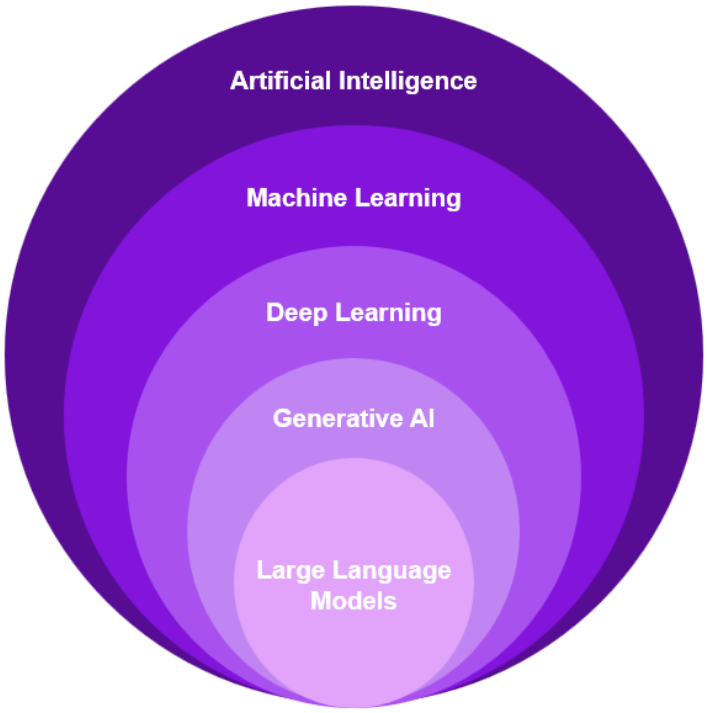
Understanding subfields of AI: Leveraging LLMs to work more efficiently

To better understand how AI can improve business processes and decision making, it's helpful to familiarize yourself with subfields of AI and some use cases.



- **Machine learning (ML)** is a subfield of AI focused on developing algorithms and statistical models that enable machines to perform tasks without explicit programming. Machines are trained on a model from input data, learn patterns from the data, and can then make predictions based on what they learned.
- **Deep learning**, a subfield of machine learning, uses artificial neural networks to enable machines to process even more complex patterns.
- **Generative AI (GenAI)** is a subfield of deep learning that uses a model to predict expected responses to a prompt and provide them to the user in the form of new content such as natural language text, audio, and images.
- A **Large Language Model (LLM)** is a type of GenAI that understands context and generates human-like text.

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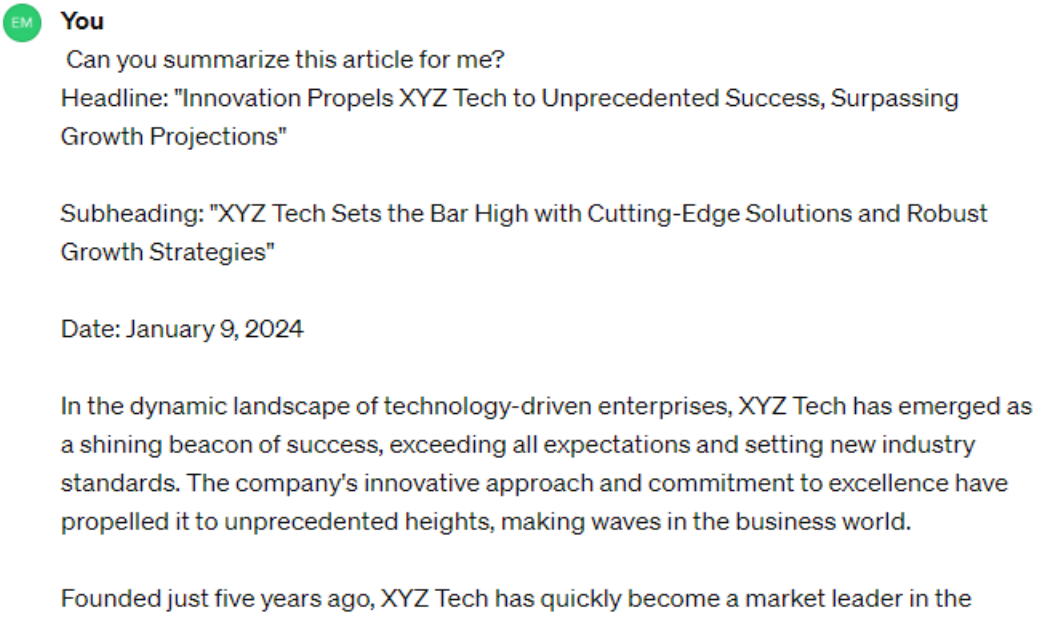
Prompts: Providing instructions to GenAI

To interact with GenAI and LLMs, users provide specific input or instruction, known as a prompt. The prompt can be a single sentence, a paragraph, or even a question, depending on the task or application. For example, if you want a summary of a news article, your prompt might be the article text itself with a question such as, *Can you summarize this article for me?* In the example image below, you only see a portion of the article, however, it is several paragraphs long.



The LLM processes the prompt and generates a response based on its understanding of the language and patterns it learned during training. The quality and relevance of the output depend on the clarity and specificity of the

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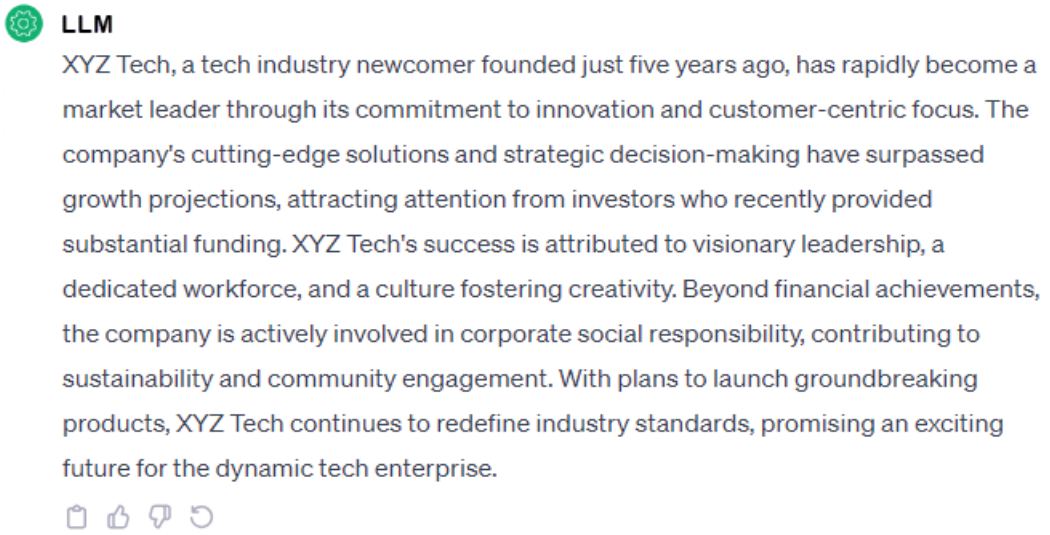
prompt. In this example, the LLM summarized the lengthy article into a single paragraph.



Integrating LLMs into business workflows

By integrating LLMs into their workflows, businesses across a variety of industries can harness the power of natural language understanding and generation to innovate and improve various aspects of their operations. Some use cases for LLMs include:

- **Content creation**: Generate high-quality and coherent content, including articles, product descriptions, and marketing copy, saving time and resources.
- **Code generation**: Generate code snippets based on natural language descriptions, aiding developers in programming tasks and promoting collaboration between technical and non-technical team members.
- **Text summarization**: Quickly analyze and summarize lengthy documents or articles, helping professionals extract key information efficiently. This is useful for decision-makers who need to review a large volume of information.
- **Data analysis and reporting**: Process and analyze textual data, helping businesses derive insights from customer feedback, social media, and other sources. This can inform decision making and strategic planning.
- **Customer support chatbots**: Enable businesses to provide instant and accurate responses to customer inquiries, improving customer satisfaction and reducing the workload on support teams. For example, Strategy's website includes a chatbot, Auto Expert, for on-demand customer assistance.

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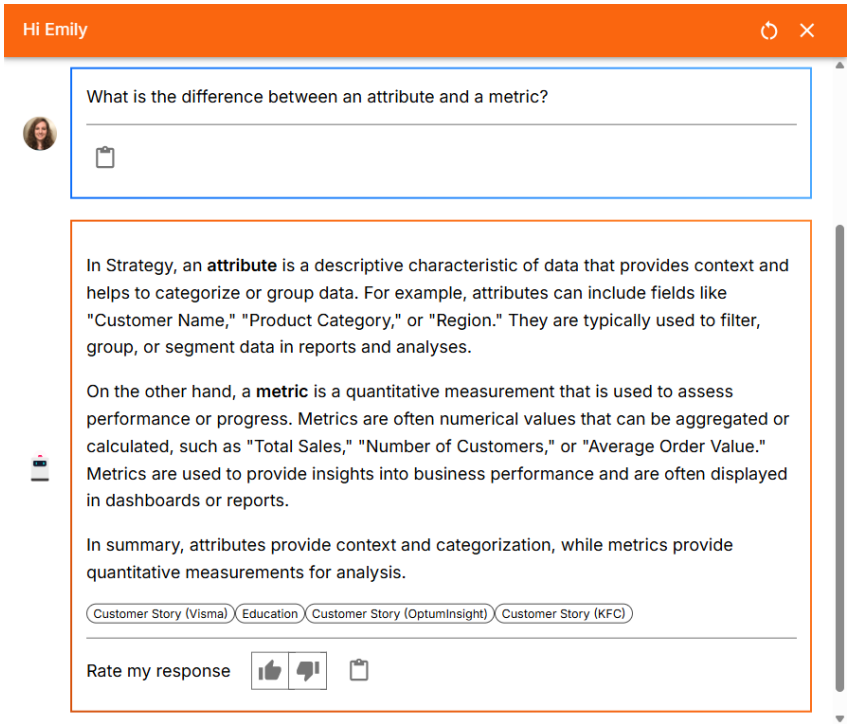
LLM integration example: Providing customer support with Auto Expert

Auto Expert is Strategy's AI chatbot, available 24/7 on the Strategy software website. Auto Expert provides user-friendly guidance on Strategy's products and services, revolutionizing how you find resources and learning materials. The intelligent assistant provides instant responses to questions on a wide range of topics such as:

- **Product knowledge**: In-depth answers to software-related questions, helping you make informed decisions on which products to leverage and how
- **Feature details**: Clear explanations and use cases for features, making it easier for you to harness the power of Strategy
- **Troubleshooting assistance**: Troubleshooting steps and tips, saving you time

Behind the scenes, Auto Expert leverages an LLM trained on Strategy product documentation, Knowledge Base articles, and a variety of other resources.

For example, you're new to Strategy and need help understanding some basic terminology. You ask Auto Expert, ***What is the difference between an attribute and a metric?*** The chatbot responds with an easy-to-understand explanation of attributes and metrics in natural language, along with links to additional resources.



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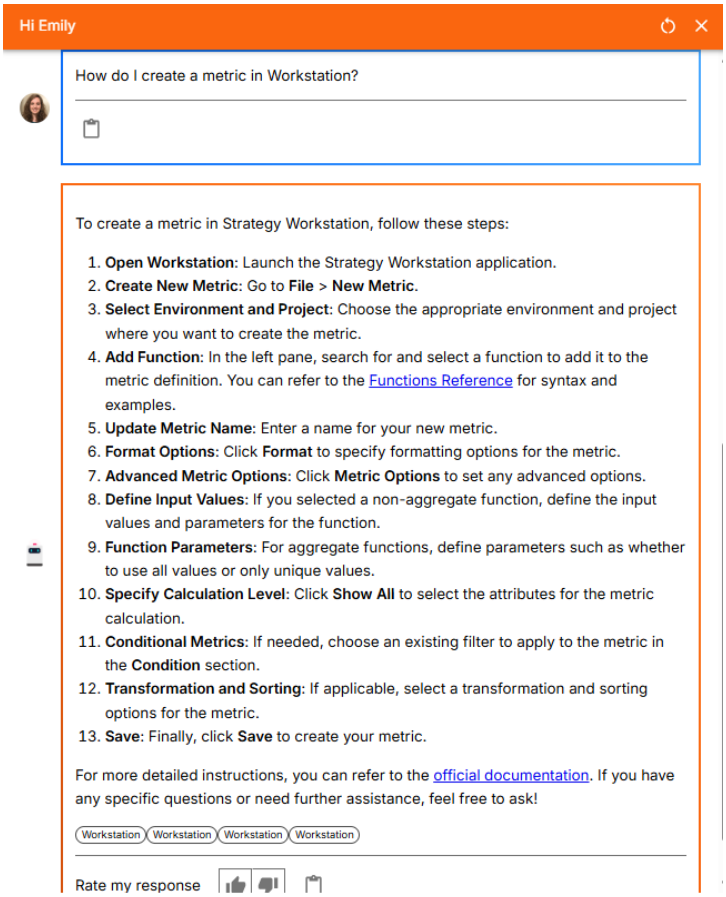
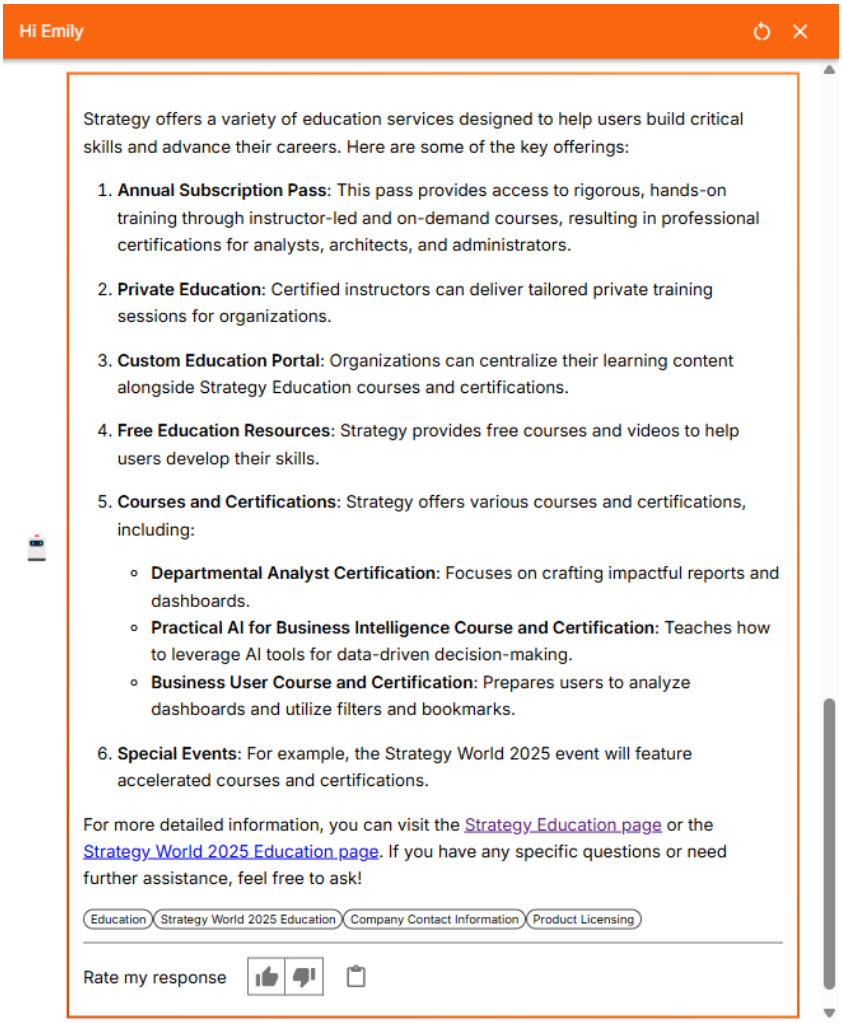
Due to the nature of AI, the responses you receive may differ.

You can also leverage Auto Expert for guidance on how to complete a specific task. In the example below, you ask Auto Expert, ***How do I create a metric in Workstation?*** Auto Expert provides the relevant steps and links to further documentation.



Additionally, Auto Expert provides information on Strategy services. For example, you want to know how to further formally educate yourself on Strategy products. You ask Auto Expert, ***What Education services does Strategy offer?*** Auto Expert

provides an overview of Strategy's Education curriculum and certifications, and where to find more details.



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Exercise: Readily access Strategy guidance and resources with Auto Expert

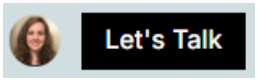
Whether you have a basic question about how to use Strategy or need help handling complex data analytics, Auto Expert is equipped with powerful AI and advanced natural language processing to fully understand your needs and provide precise solutions. In this exercise, explore the power of LLMs by interacting with Auto Expert to learn more about Strategy AI features and receive troubleshooting guidance.

Due to the nature of AI, the responses you receive may differ. Use the example responses provided in this exercise as general guidance and context for understanding how to leverage Auto Expert.

Sign in to your Strategy account

1. In a web browser, navigate to **https://www.strategysoftware.com**.
2. In the upper right of the Strategy home page, click the account icon next to Let's Talk.

If your initials or account profile picture display as shown below (instead of the generic account icon), you are already signed in and do not need to complete the rest of the sign-in steps.

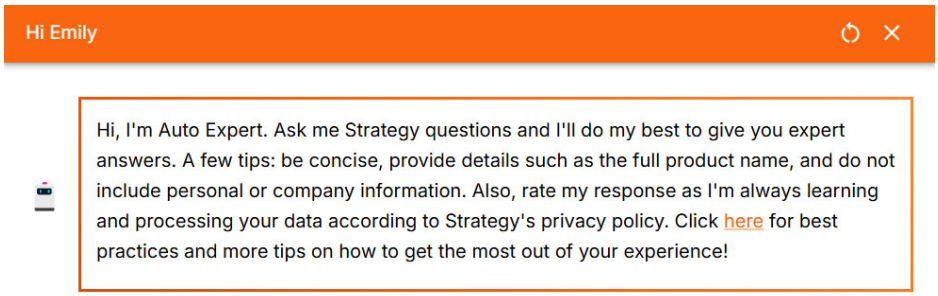


3. On the Welcome to Strategy page, in the **Email address** box, enter the email address associated with your Strategy account and then click **Continue**.
4. Enter your Strategy account password in the **Password** box and then click **Sign in**.

Interact with Auto Expert to learn about AI features

1. At the bottom right of the Strategy website, click the image of Auto Expert to open the chatbot. Auto Expert greets you and provides guidance on asking

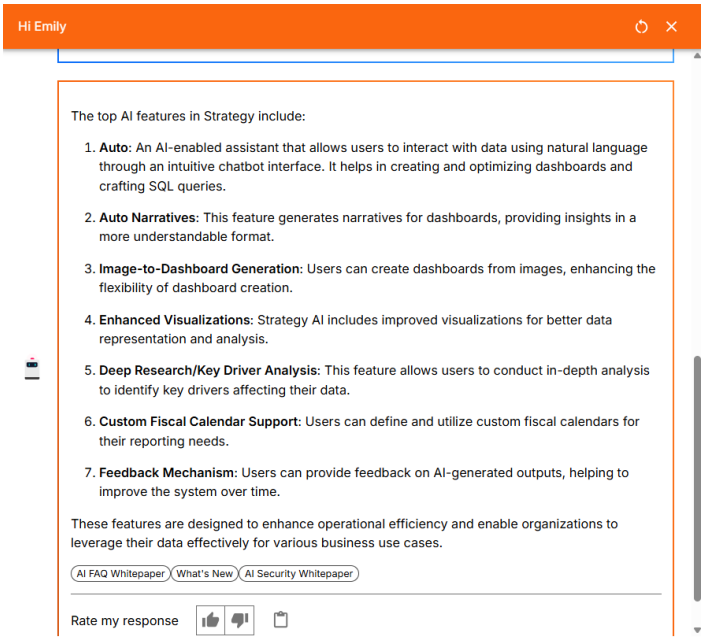
questions. For example, it is helpful to be concise and to provide specific product names, such as Strategy Workstation or Strategy Library.



If you pose a question in a non-English language and receive no response, rephrase your question in English, as Auto Expert is primarily trained in English.

2 Auto Expert is a chatbot, not a search engine, and works best when you interact with it conversationally. For example, rather than typing "top Strategy AI features" in the text box, type the question, **What are the top AI features in Strategy?** and then click the submit icon .

Auto Expert summarizes the top AI features in Strategy such as the various uses of Auto. At the bottom of the response, it also provides links to additional information.



3 You found this response helpful. Next to **Rate my response**, click the thumbs up icon . By rating Auto Expert's responses, you help improve future performance.

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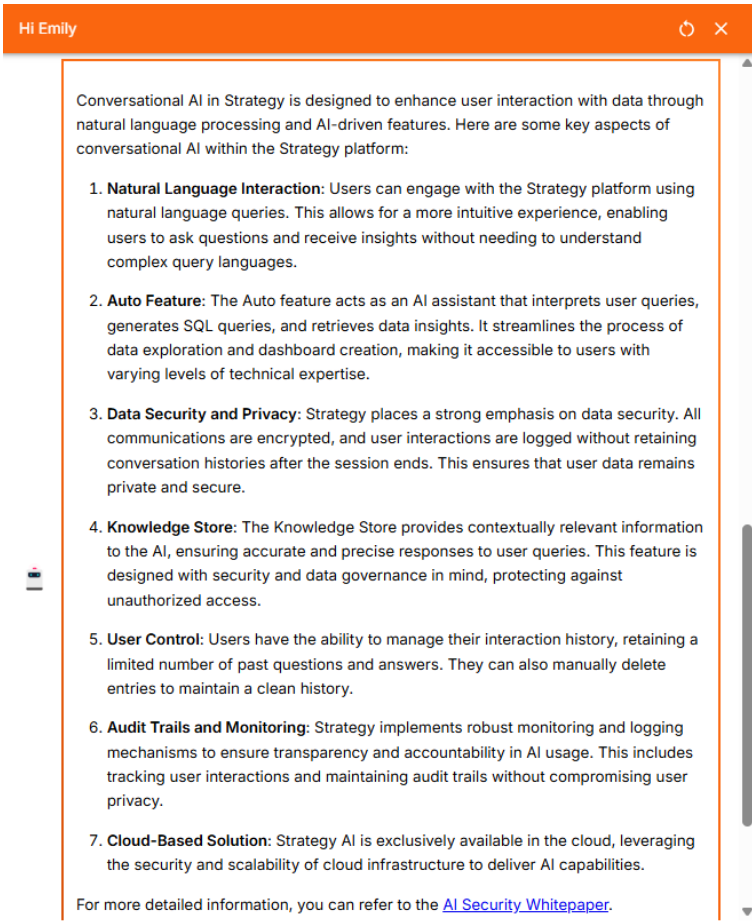
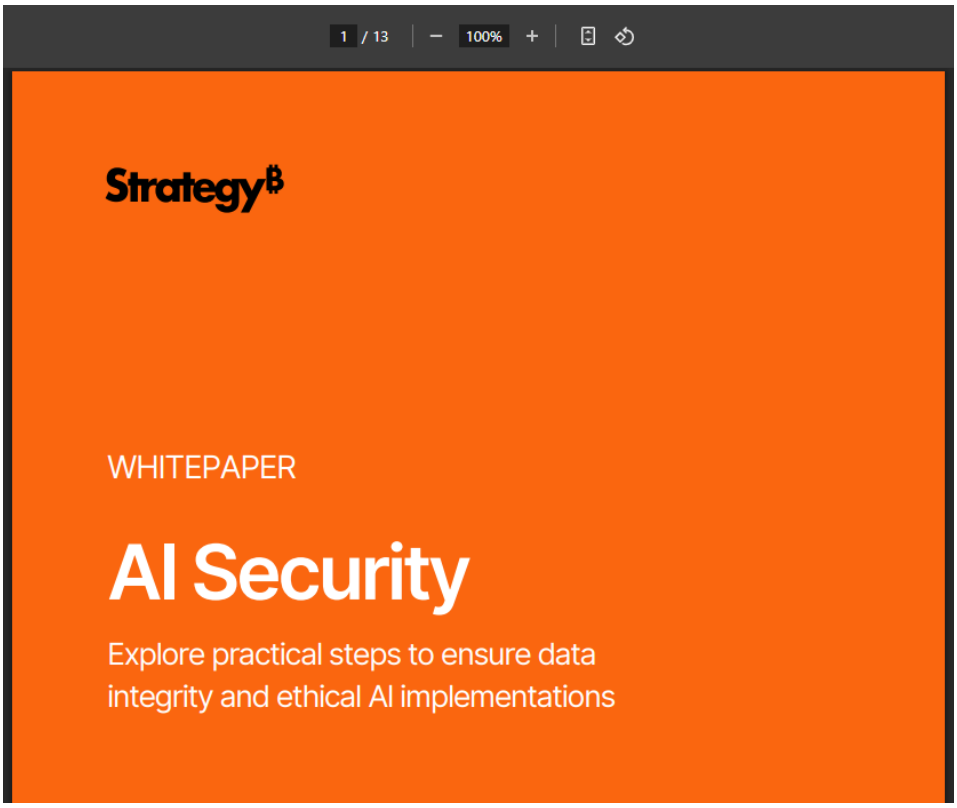
4 After reading this summary, you understand conversational AI is a feature that could assist you in your day-to-day work and want to learn more about it. In the text box, type, **Can you tell me more about conversational AI with Strategy?** and then click the submit icon .

Auto Expert provides information about the key aspects of Strategy's conversational AI, such as natural language interaction, Auto, and data security.



5 You want to view more details about Strategy AI security. Click the **Security Whitepaper** link.

A new tab opens in your browser, displaying the security white paper.



6 Return to the browser tab with Auto Expert.

7 You find Auto Expert helpful and plan on using it more frequently. To ensure you interact with it as effectively as possible, ask Auto Expert, **What are some best practices for interacting with Auto Expert?**

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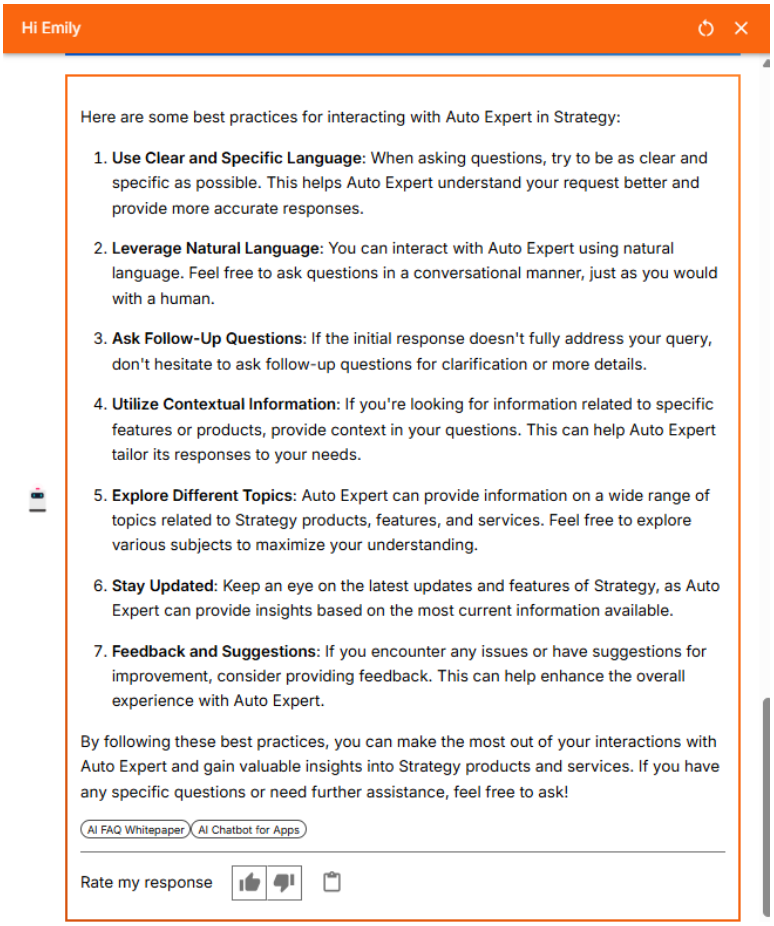
Auto Expert provides a list of best practices. Read through the response you receive to learn helpful tips for using Auto Expert.



8 You want to send this informative response to a coworker who is also starting to use Auto Expert. Under your question, click the **Copy to Clipboard** icon. You can now paste the response text into an email or other preferred form of communication.

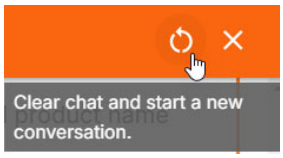
9 You found the response helpful. Next to **Rate my response**, click the thumbs up icon. Remember, by rating Auto Expert's responses, you help improve future performance.

Interact with Auto Expert for troubleshooting assistance

Now that you've seen how Auto Expert can assist with feature-related questions, explore how it can provide troubleshooting assistance. In this example, your Intelligence Server has been crashing. Rather than spending time searching for

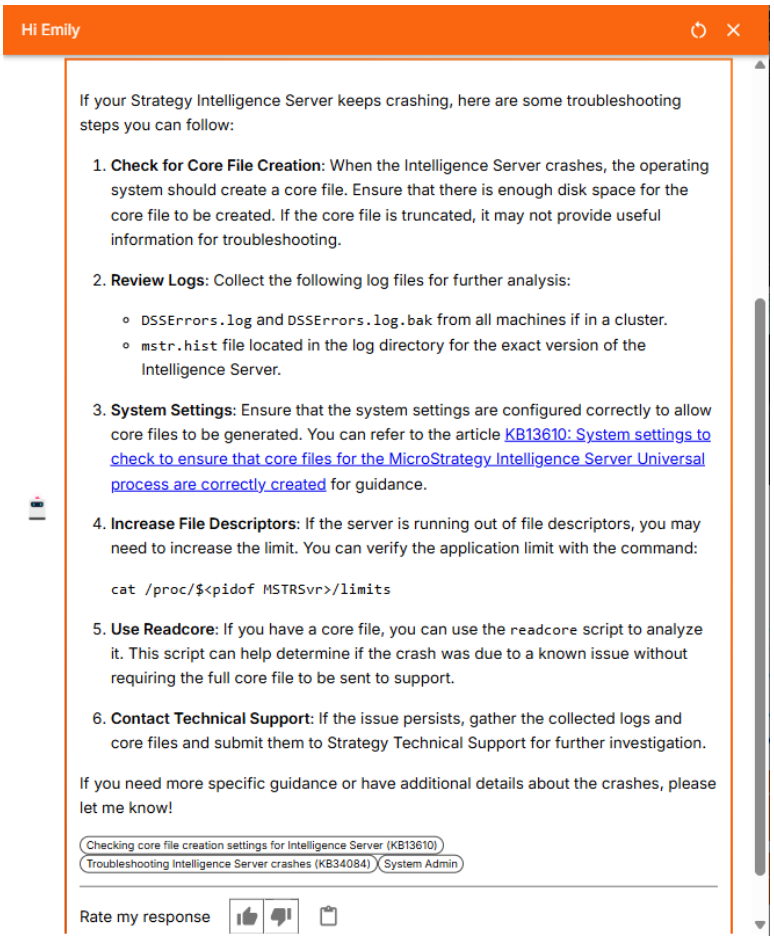
answers or trying steps you're unsure about, you ask Auto Expert what you should do.

1 To clear the conversation context, click the **Clear chat and start new conversation** icon in the upper-right corner.



2 In the text box, type, **What should I do if my Strategy intelligence server keeps crashing?** and then click the submit icon .

Auto Expert responds with recommended troubleshooting steps and links to related Knowledge Base articles with more detailed instructions.



3 Before trying these recommendations, you want to be prepared to contact Technical Support if needed. To understand your options for contacting them,

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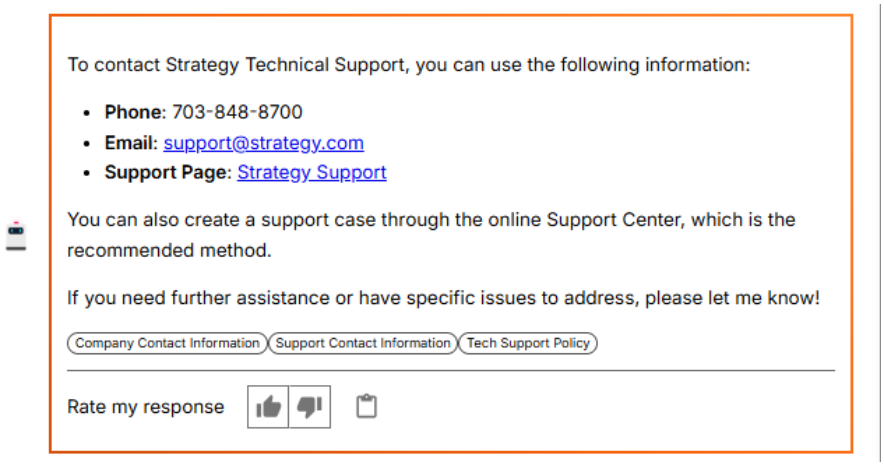
in the text box, type, **How do I contact Strategy Technical Support?** and then click the submit icon .

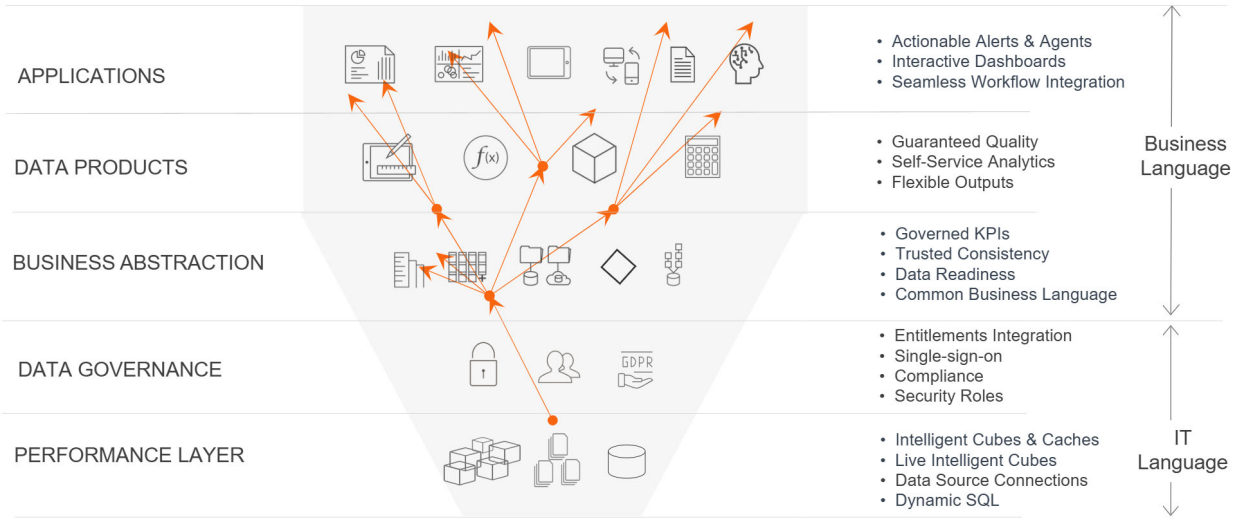
Auto Expert provides options for how to contact Technical Support, such as through the Customer Support Portal, email, or phone.



4 Click the close icon . In the Are you sure? window, click **Close Chat** to close Auto Expert.

Universal Semantic Layer: Unlocking seamless insights and robust governance

The value of AI-powered analytics depends on the quality, consistency, and governance of your data. Strategy's Universal Semantic Layer, called Mosaic, addresses this need by centralizing business logic, security, and calculations within an abstraction layer—ensuring all users and tools access the same, trusted version of the truth. Any updates to object definitions are automatically reflected everywhere they're used, enabling consistent, accurate insights and streamlined data governance.



Mosaic standardizes the representation of data using business definitions and objects that integrate with any database or data warehouse. It provides a unified view of the data, regardless of its origin. By seamlessly integrating disparate data sources, Mosaic ensures consistent data governance, without the need to create a custom data warehouse.

Without a semantic layer, AI tools operate in silos, risking inaccurate outputs as AI lacks context for your business rules. This is because AI models, by default, see only the technical structure of your databases, for example, column names like CUST_ID or TRANSACTION_TS). They cannot infer what these columns mean to the business, such as the distinction between "Net Sales" and "Gross Sales," or which data sources are the single source of truth for "Customer Lifetime Value." Mosaic provides the essential structure and context required for AI engines to generate reliable, governed insights through a secure, unified data model. When AI agents query your data through Mosaic, they receive trusted, contextualized,

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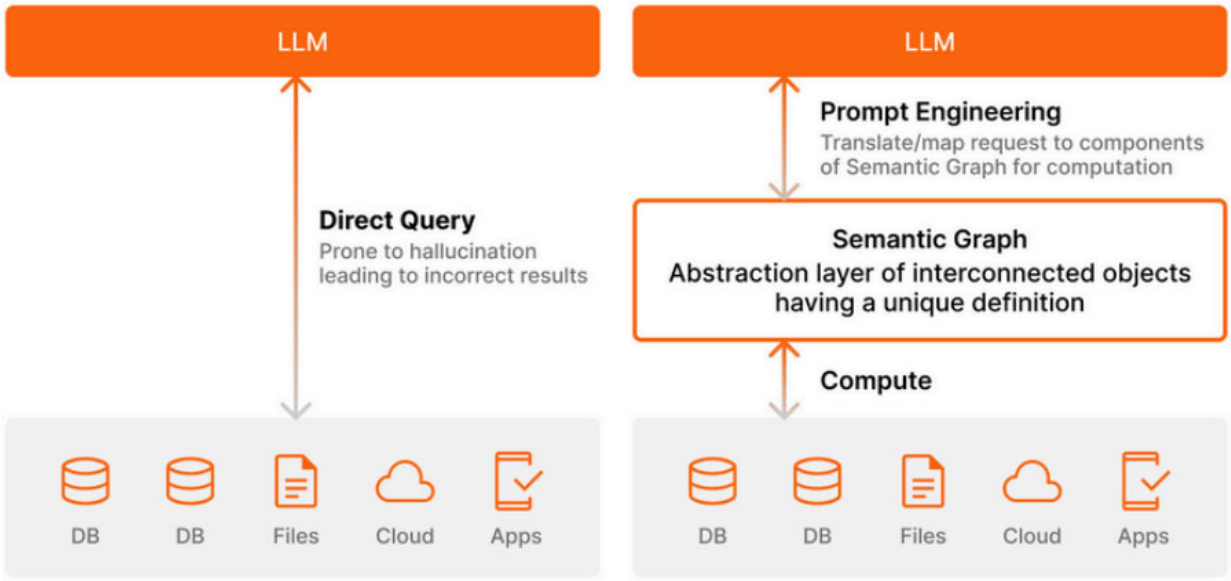
and compliance-aware answers instead of raw, siloed data, dramatically reducing the risk of making critical business decisions based on flawed AI output.



Strategy Mosaic unifies fragmented enterprise data and enhances accessibility with broad data source support and optimized connectors for applications like Tableau, Power BI, and third-party AI agents. Its open architecture and REST API ensure seamless integration, making trusted data universally available.

Ensuring data security through governance, privacy, and encryption

Trust and data integrity extend beyond trusting AI algorithms. Users need transparency about how AI decisions are made, how data is used, and regulatory compliance. The effective deployment and user adoption of AI in BI significantly depends on the integrity of the underlying data and user trust in the systems and services leveraging the data.

Strategy AI integrates advanced analytical capabilities with rigorous data protection standards to maintain the privacy and integrity of your data. By ensuring data governance, privacy, and encryption, Strategy provides consistent, accurate, and secure data processing and representation, enabling you to make informed decisions with confidence.

Governance

The reliability of Strategy's AI is anchored in the robust design of the Strategy semantic graph and its comprehensive security framework. Strategy's AI features

strictly respect Access Control Lists (ACLs) and data security measures, such as security filters set for a dashboard and its underlying objects. User-specific data security and permissions are reliably enforced across the platform with:

- **Consistent ACLs and permissions**: Every request submitted to Auto is meticulously verified against the configured ACLs of the semantic graph's underlying objects. This means that as users engage with the AI functionalities, the integrity of access controls is upheld. Users only receive answers derived from datasets they're authorized to access.

  *For more information on implementing ACLs, take the course **Securing User Privileges and Data Access** in the Administrator learning path.*

- **Granular data access through security filters**: Beyond basic ACL configurations, security filters in Strategy provide an additional layer of control by narrowing the data scope that users can query. Security filters provide Administrators the power to define precise boundaries on data access, ensuring users can only interact with permitted segments of the data.

  *For more information on implementing ACLs, take the course **Securing User Privileges and Data Access** in the Administrator learning path.*

- **Configurable privileges for Strategy AI features**: AI functionalities have configurable privileges, enabling organizational leaders to decide which users can leverage AI features. These configurable privileges provide flexibility to balance innovation with security protocols.

  You can also control the accessibility of AI features at the application and dashboard levels.

Privacy

Data privacy is consistently prioritized throughout your interactions with Auto. Your data is:

- **Not available to other customers**
- **Not used to improve OpenAI or Azure OpenAI models**: Strict configurations ensure that no data is retained or utilized for external services' model training. Azure OpenAI operates under parameters set by Strategy, which prohibit unwarranted data retention or use to train their models. This ensures optimal performance while upholding strict data confidentiality standards.
- **Not used to improve any Microsoft or third-party products or services**

Additionally, data privacy risks are mitigated through the following:

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- **Distinct environment isolation within the Strategy Cloud Environment (MCE):** Each customer's data operates in a securely segmented environment, eliminating cross-contamination risks and enhancing data protection. When the system needs to connect or submit a request to an external service, these workflows are executed with strict security measures. This includes encrypted data transmission and stateless execution requests within the security context of the customer's instance.

  *To learn more about Strategy's comprehensive approach to security and privacy through its cloud service, see the **Cloud Security Whitepaper**, available on the Strategy software website.*

- **Data retention principles**: Strategy AI does not retain conversation histories outside of the active user session, ensuring that the content of your conversation is not stored.

- **User interaction anonymization**: While Strategy may log usage data to track question consumption, specific contents of the conversation are never logged, preserving the privacy of your interactions. Additionally, while Strategy associates interactions with user IDs for internal tracking, no personal user information or identifiers are transmitted to the Microsoft Azure OpenAI service. Questions and prompts sent to the service are anonymized, ensuring no personally identifiable information is shared.

Encryption

Data is always encrypted at rest and in transit. Any communication between the Strategy platform and external services employs industry-leading encryption techniques, preventing potential interception.

*For more information on how data privacy and integrity is ensured with Strategy AI, see the **AI Security Whitepaper** and the **AI Product FAQ**, available on the Strategy software website.*

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