



AI/BI Genie

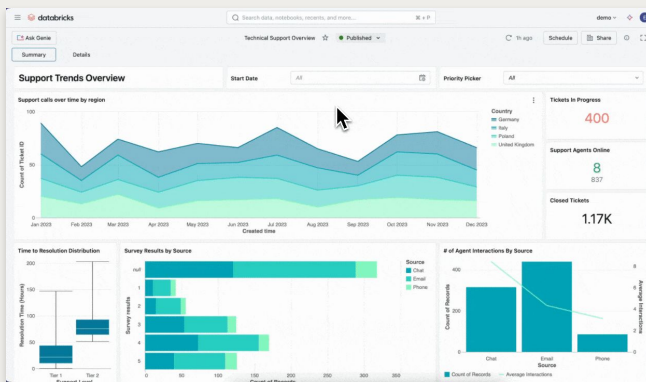
Aug 2025



Introducing Databricks AI/BI

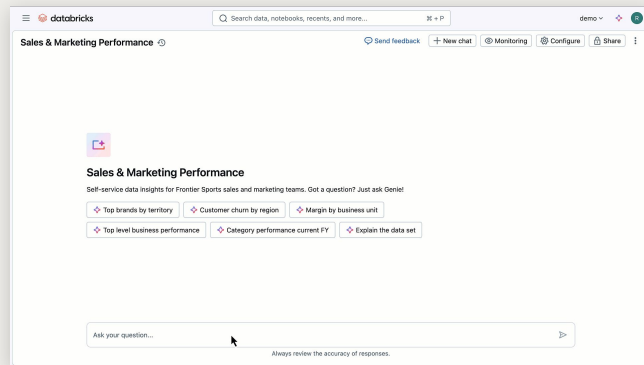
Intelligent analytics
for everyone

Powered by Databricks SQL



Dashboards

Fast and secure
visual insights for your
entire organization



Genie

Talk with your data
using natural
language

Governed and secured with Unity Catalog

Agenda

- Motivation for Genie
- Genie Fundamentals
 - How to configure Genie
 - End user experience
 - How Genie learns over time
- Demo



Motivation for Genie

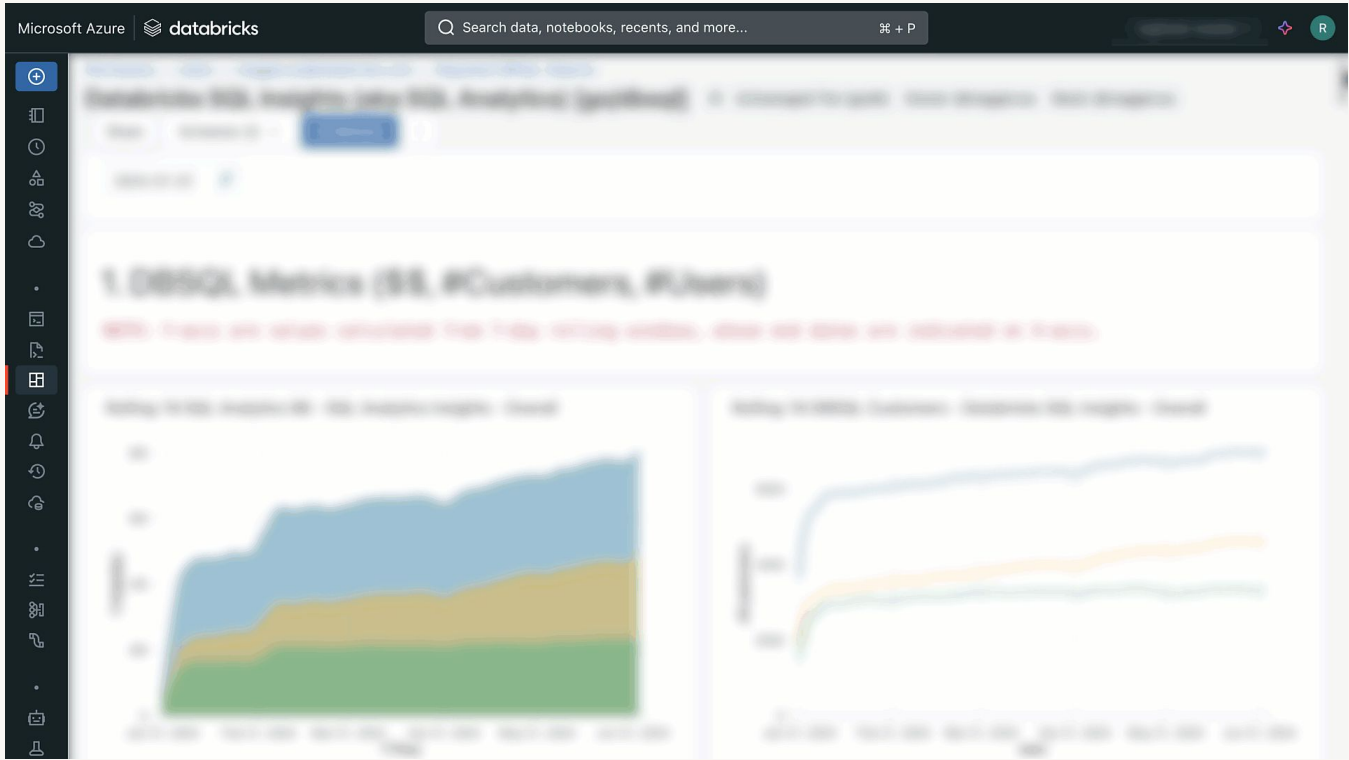


Our mission is to democratize data + AI

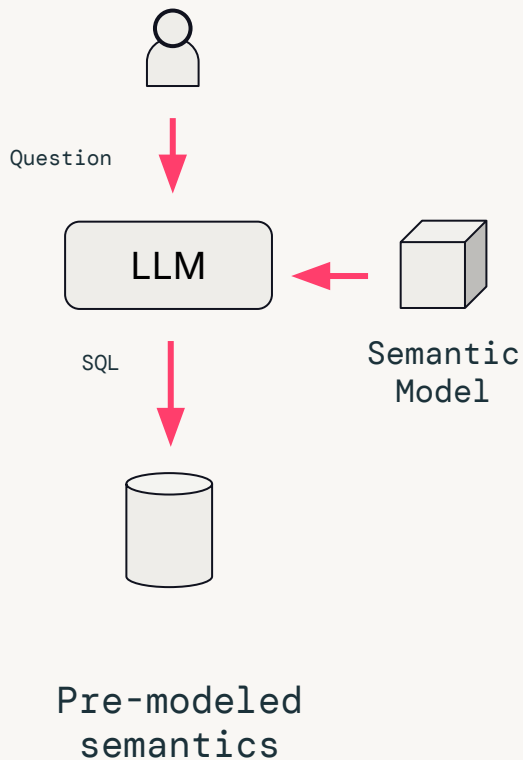
for everyone



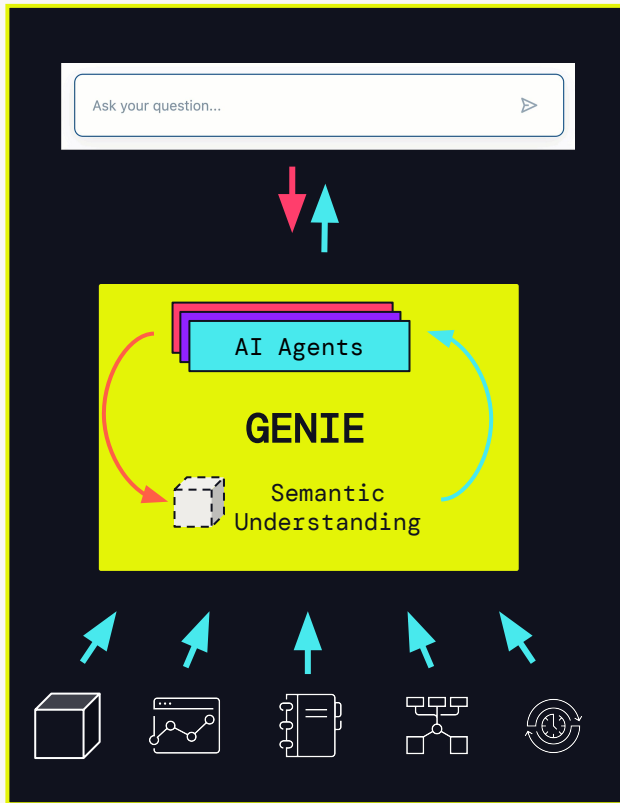
Challenge with traditional BI



Challenge with traditional BI



We designed Genie to



1. Continuously learn your data + semantics
2. Include controls for guidance + oversight
3. Be easy and secure for business users

Genie Fundamentals

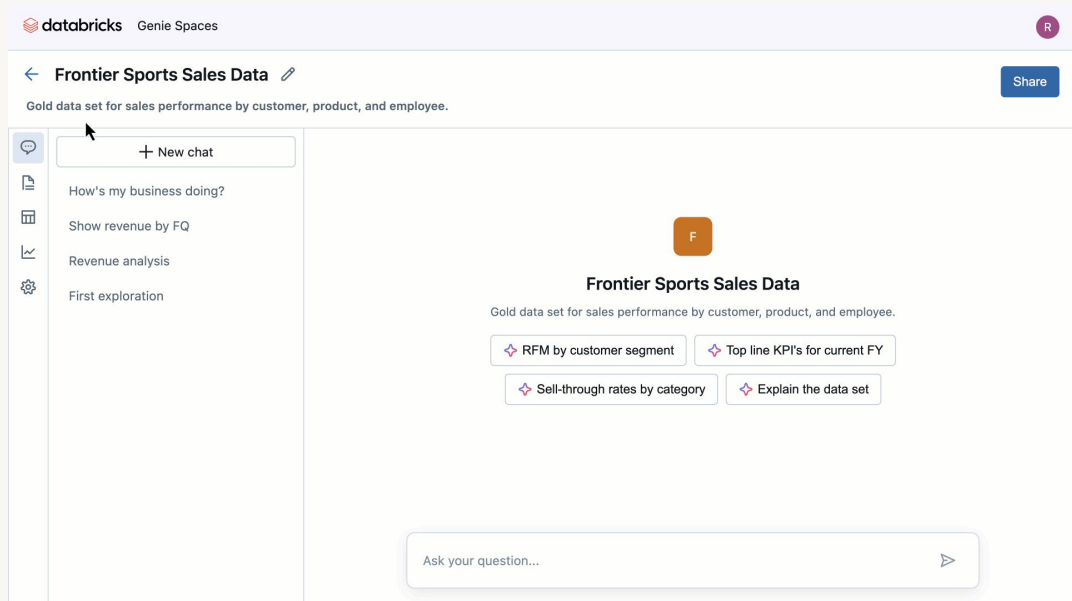


Genie fundamentals

Data teams set up **topic specific** Genie spaces

Business users can get answers to **net-new data questions**

Genie **learns over time** leveraging Data Intelligence Platform



How to configure Genie



Genie Set Up Process



Focused Topic + Data

- Each Genie space should be topic-specific
- Bring in well-documented, clean Unity Catalog tables+metadata



Add Instructions

- Authors can guide + teach Genie
- General Instructions and sample SQL statements





Accuracy Validation






- Authors + trusted business users can test expected questions
- Make needed improvements to Instructions



Focused Topic + Data


 **Sample Sales Room** 

This Genie Space provides information about our company's sales opportunities. You can access








Data


The tables power the space. Select the tables that you want to give as context to the space in the [edit form](#).


▼  **accounts**

This table contains information about accounts. It includes da...


^  **opportunity**

This table contains the most updated information for each sp...


[Open in Catalog Explorer](#) 

 **id**


the unique ID identifier for an opportunity

 **ownerid**

[the sales person who owns this opportunity](#)

 **stagename**

the current stage of the opportunity. Currently used values ar...

 **accountid**

No comment available

- Genie works on all types of data topics
- Bring in a **focused set of tables**
- Unity Catalog tables/views need to be well documented
- SUGGESTED: Create views to remove excess columns and clean data



General Instructions

- Gives data teams the power to give direct guidance
- Define your unique jargon, logic, concepts, KPIs, etc.
- Instructions are iterable over time

Assistant instructions

Add general instructions and example queries on how you want the space assistant to behave.

General Instructions

- win/won opportunities refer to the stagename value "5. Closed Won"
- lost opportunities refer to the stagename value "X. Closed Lost"
- An open opportunity is defined as not being "5. Closed Won" or "X. Closed Lost"
- Sales are calculated only on the opportunities where the stagename is a win/won opportunity. Sales people performance is only evaluated on their won opportunities.
- When users ask for sales reps, they want the name of the sales rep not just the ID
- Expected value of an opportunity is calculated by multiplying the probability by the amount for an opportunity.
- When an user asks about past purchases, check the opportunityhistory for that customer and the number of won opportunity updates there are

Join relationships:

- opportunity.id is the primary key, opportunityhistory.opportunityid is the foreign key
- accounts.id is the primary key, opportunity.accountid is the foreign key. A customer's region info is in the accounts table.

Discard

Save

Example SQL Queries

Add example queries that the assistant can learn from.

+ Add example query

what were the biggest closed deals in 2023 and who were the sales reps for them?

```
SELECT o.name AS deal_name, u.name AS sales_rep_name, o.amount, o.cl...
```

which sales reps converted open opportunities to closed opportunities at the highest percentage?

```
SELECT u.name AS sales_rep_name, COUNT(o.id) AS total_opportunities,...
```



Sample SQL Statements

Hanlin Sample Sales Room

This query retrieves the accounts and opportunities that were closed in January 2023 and had updates in the same month. It specifically looks for opportunities that were closed successfully (stagename = '5. Closed Won') and had updates that were not closed won (oh.stagename != '5. Closed Won'). The results are sorted by the closedate of the opportunities.

	account_name	opportunity_name	closedate
1	Jetpulse	Jetpulse - New Business	2023-01-04
2	Topdrive	Topdrive - New Business	2023-01-05
3	Pixonyx	Pixonyx - New Business	2023-01-05
4	Aimbo	Aimbo - New Business	2023-01-06
5	Twinte	Twinte - New Business	2023-01-06
6	Meevee	Meevee - New Business	2023-01-06
7	Feedbug	Feedbug - New Business	2023-01-07
8	Eabox	Eabox - New Business	2023-01-07
9	Brainlounge	Brainlounge - New Business	2023-01-07
10	Oyondu	Oyondu - New Business	2023-01-07
11	Gabvina	Gabvina - New Business	2023-01-08

95 rows

Save as instruction

Hide generated code

```
1 SELECT DISTINCT
2   a.name AS account_name,
3   o.name AS opportunity_name,
4   o.closedate
5 FROM
6   dataroom_sample_views_foobar.shared_views.opportunity o
7 JOIN dataroom_sample_views_foobar.shared_views.opportunityhistory oh ON o.id = oh.o_id
8 JOIN dataroom_sample_views_foobar.shared_views.accounts a ON o.accountid = a.id
9 WHERE
10  o.stagename = '5. Closed Won'
```

- Sample SQL statements directly teach the model how to answer specific questions
- “Save as Instruction” on verified SQL statements teaches Genie for future questions



End user experience



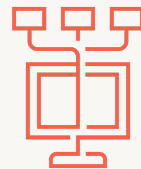
Genie <> End users



**Answer net-new
questions**



**Get tabular or
visual results**



**Provide
feedback to
teach Genie**



Monitoring Page

Monitoring
Monitor the activity within your space. Understand the errors, feedback, and results the space is returning for your users

Messages feed

Last 30 days Rating User Status

Status	Question	Rating	User	Created
Completed	what are all my opportunities that started in december fy 2023?		Hanlin Sun	2024-05-28 15:4...
Completed	what about just in December FY 2023?		Hanlin Sun	2024-05-28 15:3...
Completed	which sales reps converted open opportunities to closed opportunities at the highest percentage?		Hanlin Sun	2024-05-28 15:3...
Completed	which quarter in 2023 saw the most opportunities go from open to won?		Hanlin Sun	2024-05-28 15:3...
Completed	what were the biggest closed deals in 2023 and who were the sales reps for them?		Hanlin Sun	2024-05-28 15:2...
Completed	what were the biggest closed deals in 2023 and who were the sales reps for them?		Hanlin Sun	2024-05-28 15:1...
Completed	What is the expected value of all open opportunities in Dec 2023?		Hanlin Sun	2024-05-28 15:1...
Completed	what is the most recent sales opportunity?		Hanlin Sun	2024-05-28 15:0...
Completed	what is the average?		Hanlin Sun	2024-05-28 14:5...
Completed	what is the smallest?		Hanlin Sun	2024-05-28 14:5...
Completed	what is the biggest sales opportunity I've ever had?		Hanlin Sun	2024-05-28 14:5...
Completed	What is the expected value of all open opportunities in Dec 2023?		chao.cai@databricks.com	2024-05-28 14:1...
Completed	What is the expected value of all open opportunities in Jan 2024?		chao.cai@databricks.com	2024-05-28 14:1...
Completed	when was the first opportunity that was not closed won or lost?		chao.cai@databricks.com	2024-05-28 13:5...
Completed	when was the latest opportunity that was closed won or lost?		chao.cai@databricks.com	2024-05-28 13:5...

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- Proactively understand what your business users are asking
- Step through how Genie behaved in a conversation thread
- Make improvements to your Instructions for future questions

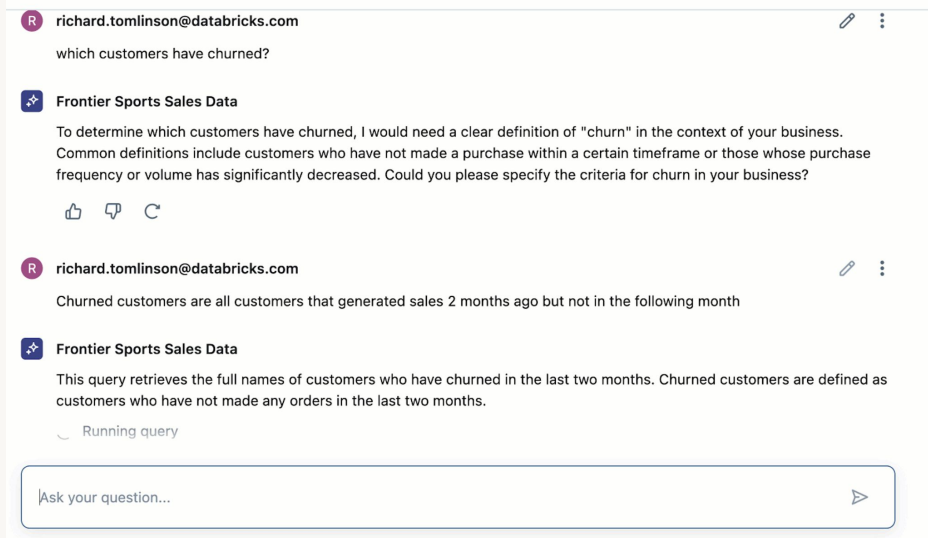


How Genie learns over time



Genie Asks Follow Ups

- When a question isn't clear, Genie is designed to ask follow ups/clarifications
- Users can add and save new semantic knowledge for Genie to handle future questions



Data Intelligence Platform

- Unity Catalog table metadata is automatically added to Genie's knowledge base
- Create Genie from Dashboard
- **COMING:** automatically learning from your workspace's Query History, Dashboards, Queries, Notebooks, etc.

Data

The tables power the space. Select the tables that you want to give as context to the space in the [edit form](#).

^ accounts

This table contains information about accounts. It includes data on the industry, name, type, r...

[Open in Catalog Explorer](#)

industry

The industry of the account

id

The unique identifier of the account

name

The name of the account

TYPE

The type of account

region_hq__c

The headquarters region of the account

region__c

The region of the account

company_size_segment__c

The size segment of the company (either SMB, MM, or ENT)

1.2 annualrevenue

The annual revenue of the account



Demo

