

A photograph of two men in business attire standing on a modern office balcony. The man on the left is wearing a grey blazer over a blue checkered shirt and glasses, holding a smartphone. The man on the right is wearing a grey blazer over a light blue shirt and a dark blue tie, holding a yellow mug. They are both smiling and looking at each other. The background shows a glass railing and a modern building facade.

How to Talk to Your Boss About Alteryx: An Analyst's Toolkit

Complete with tips, strategies, and prewritten materials to help prove the value of Alteryx to key stakeholders.

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Companies that embrace end-to-end, self-service analytics are agile, flexible, and able to seize business-defining opportunities before the competition spots them. That doesn't mean they're keeping up with every trend — they're simply maximizing their data and acting on analytic insights, including predictive and prescriptive analytics.

Your organization may not be quite there yet. And that's OK. Like most companies out there, your reality probably looks more like:

- Information trapped in data silos
- Analysis dragged down by manual processes
- Limited time to spend generating the insights that matter
- Opportunities missed before they're even recognized
- Uncertainty about how, when, or where to implement AI-powered analytics

As an Alteryx user, you have a bigger vision. Chances are, you're already using drag-and-drop, AI-guided analytics via Alteryx, so you know what it would mean for your company's future if your entire organization could access data from anywhere to obliterate data silos; build repeatable workflows that save hundreds of hours; and use AI to spot hidden patterns, find predictive insights, and instantly generate concise reports and emails for stakeholders.

Pushing for a wholesale shift to Alteryx may feel daunting. To get everyone on board with this technology, you'll need to convince a big group of stakeholders (including your boss) that there's a strong business case for transformative results — and you'll need to drive home the real cost of doing nothing at all.

Not to worry. Armed with this toolkit, you'll get everything you need to gain buy-in across your organization, one stakeholder at a time. We'll show you how.

“

I would certainly use this guide to help craft my expansion of Alteryx to other groups in my company. It provides much-needed guidance.”

—Seth Moskowitz,
Sr Business Analyst, Interpublic Group

The Doorway to Business-Changing Insights

The possibilities are endless. Just ask the analysts at DoorDash, who save 25,000 hours each year using automated analytics.

[Read the Full DoorDash Story](#)



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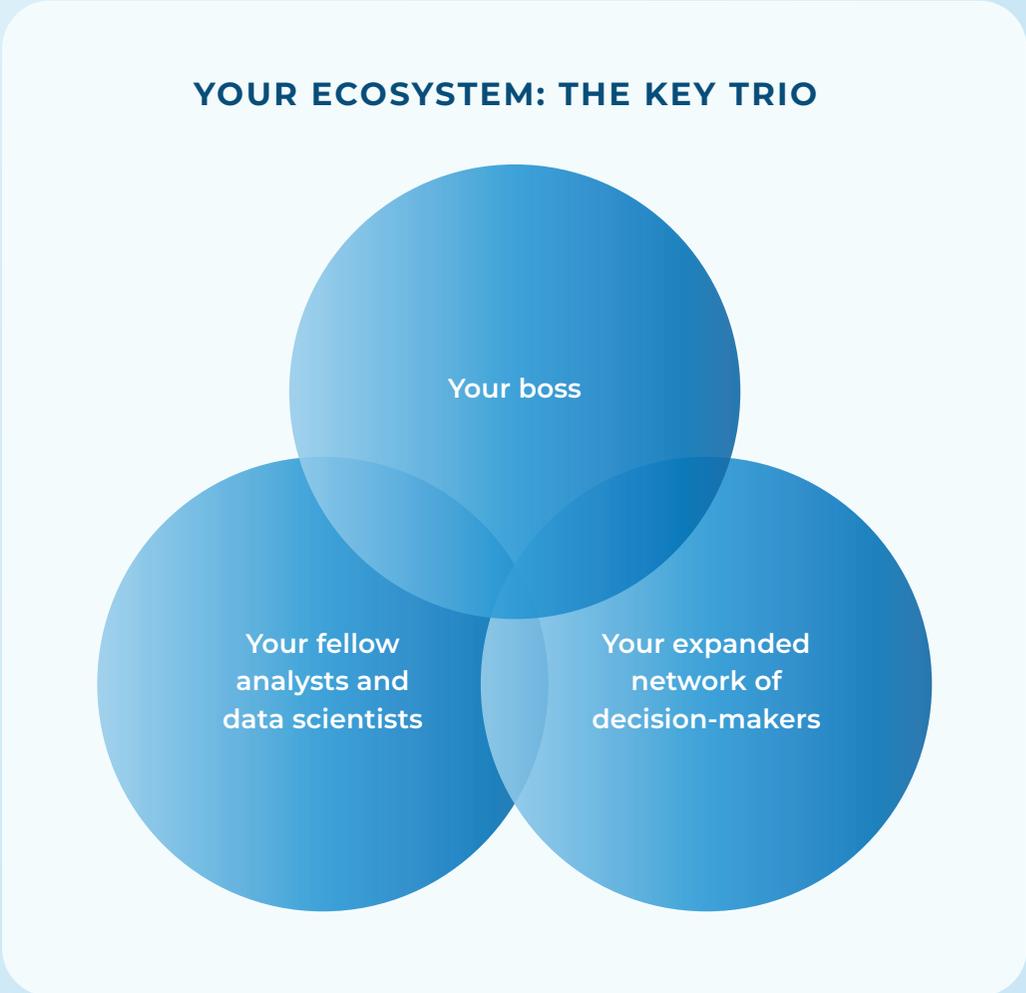
02 Craft Your Pitch

Craft Your Pitch

Map Out Your Decision-Making Ecosystem

Transforming your analytics practice with Alteryx will require action up and down the organization and across lines of business. You may be wondering where to start. For best results, we recommend engaging three fronts simultaneously: your manager, your fellow data professionals, and your expanded network. You're likely to encounter resistance in some spots and enthusiasm in others. Sparking that enthusiasm is what will ignite the momentum you're looking for.

Make sure to celebrate small wins along the way — every [Alteryx free trial](#) download provides actual business value and is a gateway to realizing your bigger dream. This is true whether your key stakeholders are analysts, data scientists, or even department heads. The path to convincing each audience is different, so you'll want to develop a strong baseline pitch that can be customized as needed.





03 Sell the Big Picture

Sell the Big Picture

As an Alteryx champion, clearly communicating the value of the technology is your main goal. If you've had some great personal or departmental wins thanks to Alteryx, you're probably thinking of sharing those and hoping they'll light a fire. However, you'll reap even bigger rewards if you think carefully about your organization's goals first.

As you're crafting your pitch, you should have a few overarching points in mind. Your mantra: Alteryx expands access to easy-to-use analytics to scale insights and impact so we can maximize the value of our data. This is how successful companies approach analytic transformations, and it's the way that yields the quickest and longest-lasting results.

WHAT CAN ALTERYX DO FOR YOU?

- Access data from anywhere to smash data silos
- Integrate multiple data sources for streamlined ETL/ELT
- Quickly prep, enrich, and cleanse your data for trusted, AI-ready data insights
- Automate repetitive tasks and perform unlimited analysis with 300+ drag-and-drop analytic building blocks
- Perform advanced analytics with AI-guided geospatial, predictive, and prescriptive capabilities

QUICK WINS

80%

of users see measurable business value in the first 14 days of trying the platform.



04 Make a Targeted Business Case

Make a Targeted Business Case

Which business goals are foremost on leadership's mind? Here are a few to get started:

- Increase revenue
- Increase efficiency
- Increase market share
- Increase customer satisfaction
- Decrease risk
- Decrease costs

Your pitch should connect the dots between the benefits of Alteryx and the goals that drive your leaders. On a more granular level, as you customize your pitch for different stakeholders, use the key performance indicators (KPIs) that are most important to each line of business or business function. (If you don't know what those KPIs are, don't be afraid to ask.) Some quick examples:

- Sales: closed-won sales, bookings, average size per sale, quote-to-close ratio, average conversion time, number of open opportunities, sales per rep
- IT: number of open tickets that exceed SLAs, improved data quality, greater security and data governance
- Marketing: number of qualified leads, net promoter scores, contribution to pipeline

Then, ask yourself, "How can a better analytics process help each stakeholder meet their KPIs and goals?" That's the case you'll have to make each time you tweak your pitch for a different audience.





05 Strengthen Your Case With Statistics

Strengthen Your Case With Statistics

On the Value of a Data-Driven Culture

To learn more about how self-service, AI-guided analytics solutions like Alteryx are impacting the ways large-scale organizations make decisions, we surveyed 2,800 enterprise leaders in various industries — across technology, financial services and banking, retail, and manufacturing in 12 countries. Key findings from our [report](#) include:

80% of leaders said that access to data improves their decision-making.

53% of respondents believe that granting more employees access to data and analytics tools would result in better collaboration.

45% say that employees having more access to data would result in quicker decision-making, and 48% believe it would improve productivity if more employees had access to data.

On the Value of AI and Analytics

Other industry research has continually shown the value of analytics and AI in organizational decision-making and success:

- For organizations that go “all in” on AI, at least **20%** of their EBIT (earnings before interest and tax) came from AI.
- The global big data analytics market is **expected to grow** exponentially to 924.4 billion by 2032.
- GenAI can increase workforce productivity by an average of **14%**.
- On average, companies see a **6-10%** increase in business revenue after adopting AI.

“

We needed a tool that would empower not only our seasoned analysts but also business users to create a more inclusive use of our data.”

—Wayne McClure, Solution Architect, Nielsen

[Read Their Story](#)

Our toolkit includes resources you can use to pitch Alteryx to your boss and throughout the organization, including prewritten emails and one page datasheets - they're ready when you need them!

This datasheet includes measurable benefits and examples of how Alteryx delivers rapid ROI.

ROI Datasheet



Use recommendations in this guide to address the most common objections to adopting new technology.

Common Objections Guide



Get a comprehensive overview of Alteryx governance, security, and integration features for IT leaders.

IT Leaders Datasheet



Communicate your case with pre-written emails you can copy and paste.

Email Templates





06 Checklist: How to Pitch Alteryx to Your Boss

Checklist: How to Pitch Alteryx to Your Boss

✔ UNDERSTAND LEADERSHIP GOALS

- Identify key business objectives (e.g., increasing revenue, improving efficiency, enhancing customer satisfaction, reducing risk, cutting costs).

✔ FIND THE ALIGNMENT BETWEEN ALTERYX AND IMPORTANT BUSINESS OBJECTIVES

- Automates data tasks to save time and increase productivity
- Improves data quality for more reliable decision-making
- Accelerates insights and responses to business questions
- Provides advanced analytics capabilities, including predictive and prescriptive analytics
- Enables more comprehensive analysis to address complex business questions

GATHER QUANTIFIABLE EVIDENCE

- ✔
 - Measure and document the time currently spent on data-related tasks.
 - Highlight potential or realized efficiency gains with Alteryx.

✔ PREPARE FOR OBJECTIONS

- Anticipate questions about current inefficiencies in data handling or alternatives to Alteryx.
- Explain how Alteryx can get up and running quickly and easily so the organization can start automating processes, reducing manual workloads, and empowering analysts to accomplish more.

✔ HIGHLIGHT SUCCESS STORIES

- Share [real-world examples](#) of companies benefiting from Alteryx.
- If possible, mention results you've seen personally, either through a free trial of Alteryx or through your own license at this company or a past company.

✔ CUSTOMIZE THE PITCH FOR YOUR STAKEHOLDERS

- **Line-of-business leaders:** Emphasize decision-making enhancements and task automation.
- **IT department:** Highlight improved data visibility, security, and automation.
- **Executive leadership & finance:** Focus on growth potential, return on investment, and risk mitigation.

✔ TAP INTO ALTERYX'S EXPERTISE

- Have the Alteryx team deliver a product demo to relevant stakeholders to show what Alteryx is capable of and provide proof of concept for high-value use cases.

✔ SUGGEST A PILOT PROGRAM

- Propose a small-scale implementation to demonstrate quick wins.
- Start by setting up an entire team on a [30-day free trial](#).
- Take advantage of Alteryx's [free interactive lessons](#).
- Use measurable results to justify broader adoption.

✔ PROVIDE CLEAR NEXT STEPS

- Clearly outline the next steps for adopting Alteryx, including what your goals are for the platform and how you plan to see ROI.



A woman with dark hair in a bun, wearing a brown blazer and light blue pants, is walking and looking to the right. She is holding a silver laptop under her left arm. The background is a light-colored wall.

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Join the Community

Don't forget: Our Community has 600k+ problem-solvers eager to share their own tips and tricks for showing the value of Alteryx to their bosses. Join our Community today to share your experiences and get advice from other data pros who've been through the process.

[Join the Community](#)

We're here to help

Once you provide the starting nudges, Alteryx has a way of creating momentum. We're here to support you in any way we can. You can always ask our sales team a question at any time via our website or by phone: 1-888-836-4274.

ABOUT ALTERYX

Alteryx powers actionable insights with the AI Platform for Enterprise Analytics. With Alteryx, organizations can drive smarter, faster decisions with a secure platform deployable in on-prem, hybrid, and cloud environments. More than 8,000 customers globally rely on Alteryx to automate analytics to improve revenue performance, manage costs, and mitigate risks across their organizations.

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