



**You don't  
need more BI.**

**You need to  
shift your  
mindset.**

# I Spreadsheets are the answer. ✨

You retooled your stack. You built the models. You keep the data clean and consistent for consumption.

The business should be enabled.  
They're not.

Ad hoc requests continue to pile up. Your team is frustrated and stretched thin. They're shipping more, faster—across all sorts of end-points, too—but it's not making an impact.

Day in, day out. Wash, rinse, repeat.  
*Sisyphus retold in 8K.*

**We get it.** Every year, thousands of data professionals come to Coefficient with the same problem: They're doing everything "right" and still struggling to fully support the business.

Their BI tools are falling short. Usually, business stakeholders are trying to:

- Automate a centralized reporting dashboard for their CRO
- Share financial operating models across different departments
- Blend data from multiple sources for quick, one-off reports

As one customer told us,

**"Tableau is great at doing very difficult things, but it's extremely hard to do very easy things in some cases."**

Looker, Power BI, no matter: it's always the same story.

Every new dashboard barely has time to settle before new requests pour in. Users want additional views, custom filters, additional fields, and extra pages—even better, CSVs.

The message behind these requests is clear: the business wants to dig deeper into the data. They want spreadsheets.

Here, we'll dive into how our customers are delivering better data experiences and meeting their business users' needs head-on.

## | Meet users where they are

**"We want to be flexible and minimize what our stakeholders have to learn. We don't need another access layer."**

Sr. Data Engineer, FinTech

World of Warcraft. The Sims. Grand Theft Auto.

These games are loved because they let players explore their way: no rules, no judgments. Constraints are coded in, but users experience total freedom. Sound familiar?

The same idea applies to data. **There isn't a "right" or a "wrong" way to explore it.** Good data teams align with how people work best. They build guardrails, not gates.

Despite 90% of employees having access to BI tools, less than one-third use them regularly. The truth is that business users just want to get their work done quickly with a tool they know and trust.

They're not living in dashboards – they live in spreadsheets.

Not convinced? 61% of employees dislike their work tech stack. If you try to force them, it won't work. 85% will use the tools they need to get their job done, even without approval.

Instead of working against user preferences, it's best to acknowledge them and adapt accordingly.

The goal is to make spreadsheets a powerful, governed extension of your data strategy instead of trying to replace them. To set yourself up for success, start by deeply understanding how people interact with data.



### **Connect with your customers:**

Conduct surveys and informal chats to understand their use cases, pain points, and uncover hidden needs.



### **Observe actual behavior:**

Analyze usage patterns to see how users navigate your data ecosystem. Notice where they get stuck. Identify which data sources and datasets they use and export most often. Use these insights to determine what to make accessible.



## Learn from the past:

Examine the types and frequency of data requests over time. Look for recurring themes. This can guide support strategies.

By doing these three things, you'll quickly see just how central spreadsheets are to your users' work. You'll understand their true value and impact on your team's success.

# | Build guardrails, not gates

### Flow state of mind

People thrive when they can work without constraints.

That's why Finance and Sales love spreadsheets. They're a blank canvas to:

- Experiment and explore
- Build solutions for any goal
- Share and gather feedback

BI tools do a lot, but they can't recreate this open-ended experience.

**"We want folks to get the data quicker... a bridge for the business experts that lack SQL knowledge to work deeply in our stack."**

- Sr. Director of Data Management & Analytics, HR Automation

Analytically mature organizations are those where business users feel accountable for both their data and how it's used. This doesn't mean data teams need to give up control or sacrifice security but rather provide the right level of access to data and the right tools.

The key is to create an environment that prioritizes the end-user experience and supports self-service—all within the framework of carefully constructed guardrails.

Here's how to strike that balance:

★ **Accept spreadsheets**

Embrace spreadsheets as the primary interface for business users. It's where they're comfortable and most productive.

★ **Connect the dots**

Set up data pipelines that feed directly into these spreadsheets. This lets users access live data without leaving their comfort zone.

★ **Show the journey**

Help users understand where data comes from and how it's transformed. This builds trust and aids correct interpretation.

★ **Control access**

Set up different levels of access based on roles and needs. This keeps sensitive data secure while giving users what they need.

★ **Automate everything**

Ensure data is accurate and up-to-date. This gives users confidence in what they're working with.

## ★ Provide context

Offer clear guides on data definitions, calculations, and best practices. Make these readily available.

## ★ Listen to feedback

Create ways for users to ask questions, report issues, or suggest improvements. This helps your team stay on top of user needs.

When business users can directly access and work with their data, everyone wins. They can quickly solve their own problems, and your data team gets much-needed breathing room.

Elliot Evins, Senior Strategy & Planning Analyst at Velocity Global put it well:

**“We told the data team, ‘You guys are juggling it all: ETL, organizing, and running the BI tool... Let us ease some of that burden by using Coefficient, so you’re not swamped with ticket after ticket.’”**

# Lead by following

**“The reason why we love spreadsheets is that using data is easier in a spreadsheet... nothing competes with their flexibility.”**

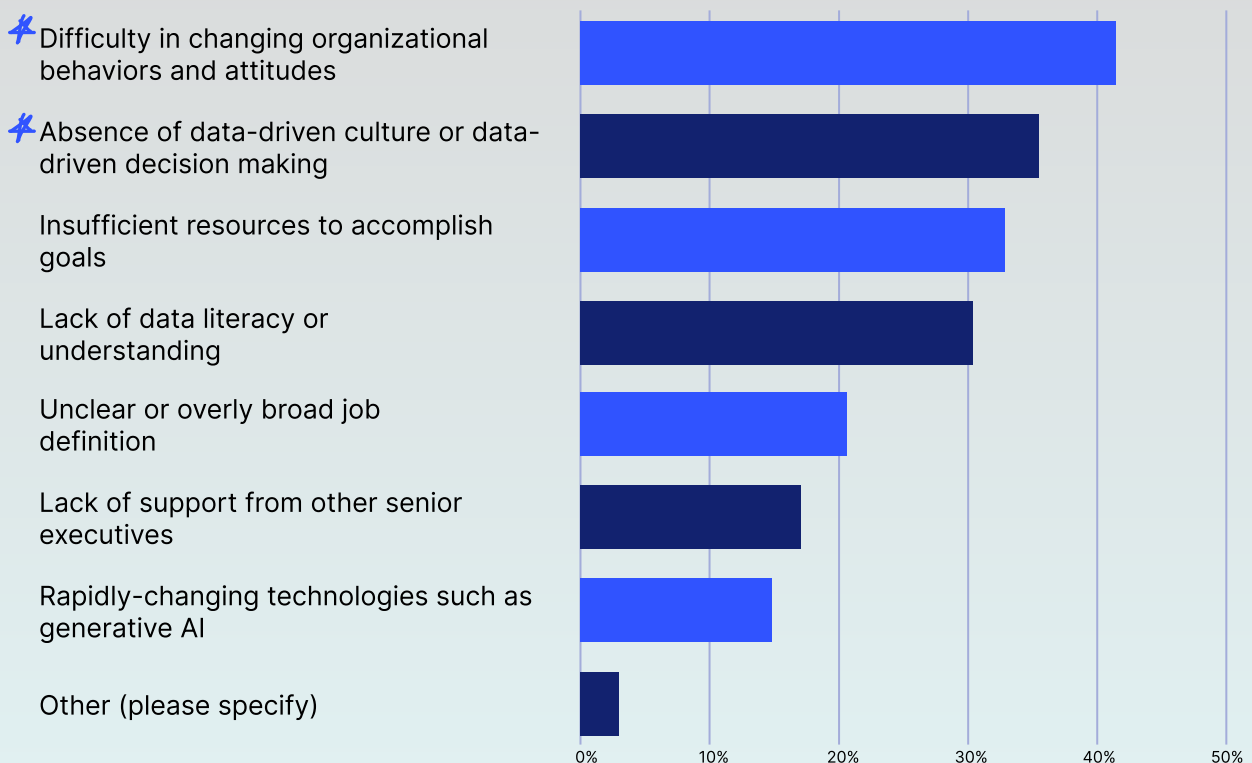
- Laurie Josephson, Head of Reporting and Analytics, Klaviyo

Data leaders measure their success by achieving business objectives. What's standing in their way? Culture.

That's why data leaders spend so much time on efforts to make their organizations “data-driven.”

[Source: AWS](#)

## What have been your greatest challenges in the CD(A)O role?





So why isn't it working? The old-school playbook hasn't changed – host office hours, create centralized catalogs, establish Analytics Councils – all to drive the adoption of complex BI tools at all costs.

Sound familiar?

The problem is that the top-down approach ignores how people actually interact with data. It also creates a negative feedback loop. The more you force-feed business users, the more resistance you face.

The disconnect that results is so vast it's almost comical. Despite 90% of employees having access to BI tools, less than one-third use them regularly.

**That's not an adoption problem – it's a fundamental mismatch between tools and users.**

Here's the thing: culture, by definition, is a grassroots movement. You can't force it from the top down.

Instead, let your data culture grow organically from the bottom up.

Here's how our customer Klaviyo did it:

PLAYBOOK:

**Contagious self-service.**  
**Create a lasting data culture by getting out of the way.**

Klaviyo, the marketing automation platform that IPO'd at \$9.2 billion last year, is the perfect example of why the most effective way to build a data culture is to let it grow from the ground up.

They were able to create genuine enthusiasm and an appreciation for data that spread like wildfire, fueling widespread adoption across the company.

- 1. Demonstrate value:** Klaviyo set the tone with an automated performance report for leadership, sparking interest from Finance and Product.
- 2. Eliminate barriers to entry:** For Klaviyo, connecting their data to spreadsheets made it easy for anyone to jump into their own use cases and move quickly.
- 3. Encourage peer-to-peer onboarding:** The product team created an internal wiki and tutorials, including access instructions.
- 4. Cater to different learning styles:** Klaviyo made the wiki a living document, evolving with tool usage and team needs. Focus on accessibility for non-technical users.
- 5. Level-up user-generated content:** The data team organized docs and resources by business use cases. Finance then created videos and guides for non-SQL users.



Want to dive deeper into how Klaviyo scaled self-serve?  
Read the full case study [here](#).

# | What does success look like?

Short answer: you'll know it when you see it.

Listen to your team. Do they seem more engaged in their roles? Is their backlog shrinking? Are they tackling more predictive, high-value questions?

They'll be thriving.

Your business stakeholders will also feel the difference. They should express increased trust and confidence to use your data. You'll likely see fewer ad hoc requests, complaints, and support tickets.

They'll be happy.

At the end of the day, you don't need a clever way to measure value. The business and your team should feel the positive impact every day.



# | Closing the last mile

**"It's infinite and inherent flexibility—a beautiful blank canvas that puts no bounds on the way you work."**

-Navneet Loiwal, Co-Founder and CEO, Coefficient

The modern data stack is nearly 15 years old. Data leaders are still chasing “ROI” by optimizing their stacks and investing in new tools to drive consumption.

But the data leaders creating the most value are the ones that realize business users aren't passive consumers – they're curious explorers. They need to interact with data, to manipulate it, to test hypotheses in real time.

**That work always has—and always will—happen in spreadsheets.**

Data only creates value when it's in the hands of business experts.

Here's what that looks like:

- Sales can build dynamic lead scoring models that combine historical win/loss data with real-time pipeline velocity and customer engagement data.

- Finance can create rolling 13-week cash flow forecasts that automatically update with real-time data from ERP software, AP/AR systems, and sales pipelines.
- Marketing can build multi-touch attribution models that combine web analytics, ad platform performance, and CRM data to calculate precise ROAS across channels.

That's how data creates real impact.

At Coefficient, we believe in bridging the gap between data teams and business users. By connecting spreadsheets directly to your data sources, we help both sides work better together.

**The result? Faster decisions, fewer bottlenecks, better results, and happier teams.**



425,000+ happy users

**Let's get started**

Try it for free or see a demo at  
Coefficient.io

Get Started Free

