

# WORKBOOK

Plan Your 2026 BI Roadmap

*“If 2025 was about surviving BI chaos, 2026 should be about shaping it.”*

A practical workbook by 29FORWARD to help you set priorities, define work packets, and finally stop fighting fires.

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## The BI Reality Check

Before you can plan, you have to be honest about where you are right now. Rate each statement from 1 (Never) to 5 (Always).

Statement	1	2	3	4	5
<b>I feel like we're being left behind when it comes to AI.</b>					
<b>We've been talking about self-service BI for years — but it still feels out of reach.</b>					
<b>Our data team spends more time maintaining dashboards than improving them.</b>					
<b>Every new dashboard request feels like a project.</b>					
<b>Leadership still asks for PowerPoint slides instead of using dashboards.</b>					
<b>We don't really have a BI roadmap — just a backlog.</b>					

If you scored over 20: you're not alone. Most BI teams are stuck somewhere between "holding it together" and "trying to modernise." The good news: clarity and small wins can unlock momentum fast.

## Where Are You Feeling the Pain?

Tick every challenge that sounds familiar — it'll help you see patterns:

Common BI Challenge	Yes	No	Notes / Teams Affected
Too many data sources, not enough integration			
Reporting backlog that never shrinks			
Dashboards that people say they use (but don't)			
Over-reliance on one or two "BI heroes"			
KPI definitions that change from team to team			
Conflicting data between systems			
No clear ownership of reports or datasets			
"AI curiosity" but no clear plan for it			

Tip: Don't overthink this. It's not about blame — it's about surfacing where your team's energy goes each month.

### Step 1: Prioritise the Right Problems

Use this grid to help you see which issues deserve attention first.

Problem	Pain (Low–High)	Impact if Fixed (Low–High)	Effort (Low–High)	2026 Priority
e.g. Manual monthly report	High	High	Low	✓
e.g. Lack of AI experimentation	Medium	Medium	Medium	
e.g. Metric confusion across teams	High	High	Medium	✓

Hint: Start where you’ll see visible improvement fastest — that’s how you build buy-in for bigger roadmap goals later.

## Step 2: Define Your 2026 Work Packets

These are your building blocks for a smarter, calmer BI year.

Work Packet	Description	Typical Timeline	Value Delivered
<b>Data Foundations Reset</b>	Audit key data sources, document metrics, clean pipelines	1-3 months	Improves trust and clarity
<b>Automation Sprint</b>	Identify and automate 2-3 recurring manual tasks	4-6 weeks	Saves hours weekly
<b>Dashboard Modernisation</b>	Refresh or consolidate outdated dashboards	2-3 months	Increases adoption
<b>AI Readiness Pilot</b>	Trial simple AI tools for reporting, forecasting, or analysis	1-2 months	Builds confidence
<b>Governance Lite</b>	Define ownership and version control for reports	1 month	Reduces confusion
<b>BI Enablement Program</b>	Train power users and simplify self-service access	Ongoing	Empowers teams

### Step 3: Draft Your 2026 BI Roadmap

Use this space to sketch your next 12 months. You don't need perfect detail — just clear direction.

Quarter	Focus Area	Key Deliverables	Owner	Outcome
Q1				
Q2				
Q3				
Q4				

### Step 4: Make 2026 the Year BI Feels Lighter

Small changes add up quickly. Pick one initiative from your roadmap that you'll start in January — even if it's tiny.

Our first 2026 BI win will be: \_\_\_\_\_

Momentum comes from movement — not perfection.


### Leave 2025 (and its problems) Behind

2025 was messy. Manual workarounds, backlog requests, and dashboard fatigue. 2026 is your chance to reset — with clarity, automation, and confidence.

Book a Free 2026 BI Planning Session with 29forward

We'll help you:

- ✓ Prioritise your top 3 BI challenges
- ✓ Design a realistic roadmap (with achievable wins)
- ✓ Leave 2025's chaos behind — for good

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### About 29forward

We help data teams move faster with less chaos — using the tools they already have. From manual Excel reporting to automated dashboards and modern BI roadmaps, we turn reactive work into structured delivery.

"It's not about more data. It's about better direction."