ACROSS THE TABLE

BUSINESS CONSULTING

BUSINESS JOB 17 · EPISODE 17

Power BI vs Tableau vs ThoughtSpot

Dashboards and analysis — and the honest answer about whether your business needs any of this yet

Knowledge Article 17

AI Stack Series · acrossthetable.biz

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THE JOB THESE THREE DO

Every business wants to "see its numbers". These three are the tools that promise it.

Here is the thing nobody selling them says: all three assume your data is already somewhere tidy and connected. If your numbers live in your books, a spreadsheet and your head, none of these will help until that changes.

This article is as much about whether to start as which to pick.

> **THE STEP BEFORE ANY OF THESE**
> These are reporting tools, not tidying tools. Getting your data into one clean place is the real work — and it is most of the work. A small business with clean books and a spreadsheet often has everything it needs without buying anything here.

WHO EACH ONE IS

Power BI — the Microsoft one

What it is: Microsoft’s business intelligence and dashboards.

Best for: Microsoft-centered reporting.

Watch out for: Data modeling is the real work.

Power BI is the natural choice if your business already runs on Microsoft. The honest warning in your own data says it: modelling the data is the real work, not building the chart.

Tableau — the serious analysis one

What it is: Deep visual analytics and exploration.

Best for: Teams doing serious analysis.

Watch out for: Needs skilled hands.

Tableau is for teams doing genuinely deep analysis and it needs skilled hands. Three stars for small business, which is accurate.

ThoughtSpot — the plain-question one

What it is: Ask questions of your data in plain language.

Best for: Non-analysts who need answers themselves.

Watch out for: Requires a modeled data source.

ThoughtSpot lets people ask questions in plain words rather than building reports. Appealing — but it still needs a properly modelled data source underneath, so it does not remove the hard part.

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HOW THEY COMPARE

	Power BI	Tableau	ThoughtSpot
Best for	Microsoft businesses	Deep visualization	AI and search analytics
Ease	Intermediate	Intermediate / Advanced	Intermediate
Small-business fit	★★★★☆	★★★☆☆	★★★☆☆
Advanced fit	★★★★★	★★★★★	★★★★★
Its main job	BI and reporting	Visual analysis	Ask questions of data
Choose this if	You're Microsoft-heavy	Analytics sophistication matters	You want conversational analytics
Price	Per user/month.	Per user/month.	By consumption.

Read the small-business fit row carefully: four stars, three, three. This is the first card in the series where the honest answer for many readers is "not yet".

HOW A BUSINESS ACTUALLY USES EACH ONE

A business on Microsoft with tidy data

Power BI. Sales, costs and hours in one dashboard the owner actually opens on a Monday.

A company with an analyst

Tableau. It rewards skill, and without someone who has that skill it mostly produces expensive charts nobody reads.

A team whose questions keep changing

ThoughtSpot, so people get answers without queueing for a report. Only works once someone has modelled the underlying data properly.

WHAT IT COSTS

Power BI and Tableau are per user per month. ThoughtSpot is priced by usage.

The subscription is not the main cost. The main cost is the person who connects and models your data, and that cost exists whichever of the three you choose.

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WHERE THIS SITS IN YOUR STACK

The business owner doesn't simply need another dashboard. They need answers. Instead of "Revenue: $500,000", ask "why did revenue decline 11% in Arizona last quarter?" HubSpot brings the sales data, QuickBooks the financial data, marketing the campaign data, HR the workforce data and customer service the service data. All of it feeds business intelligence — and then an AI assistant helps interpret, investigate and communicate approved information.

The pieces around it:

- HubSpot — sales data
- QuickBooks — financial data
- Email platform — campaign data
- JuntosHR — workforce data
- Zendesk / Intercom — service data

THE CEO DECISION

- Is your data already in one clean place? If not, that is the project, not this.
- Who will build and maintain the reports? Without a named person this does not happen.
- What decision would a dashboard change? If you cannot name one, you are buying a screen rather than an answer.
- Would a spreadsheet do for now? For many small businesses, honestly, yes.

APPLY IT TO YOUR BUSINESS

Write down the three numbers you would check every Monday if they were easy to see. Just three.

Now work out where each one lives today and how long it takes to find. If it is under ten minutes a week, build the habit with a spreadsheet and skip this card entirely. If it takes hours, you have a real case — and the first step is still tidying the data, not buying a tool.

YOUR QUICK REVIEW

- ☐ What three numbers would I check every Monday?
- ☐ Where does each one live right now?
- ☐ How long does it take me to find them today?
- ☐ Is my data in one clean place?
- ☐ Who would build and maintain the reports?
- ☐ What decision would actually change as a result?

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ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Power BI	www.microsoft.com/en-us/power-platform/products/power-bi	Microsoft-centered reporting.
Tableau	www.tableau.com	Teams doing serious analysis.
ThoughtSpot	www.thoughtspot.com	Non-analysts who need answers themselves.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which of the twenty jobs to start with.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

CONTINUE LEARNING

This is Business Job 17 of twenty. Episode 18 is Handle Contracts — Spellbook, Harvey and CoCounsel.

Episode 13, on bookkeeping, is the prerequisite for this one: clean books are where trustworthy numbers come from.

READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

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