

Effectively Deploying Data Agents for Reliable Business Insights

04

A practical guide for your business

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01

Connecting Data Sources: A Careful Start

Connecting data sources to a Data agent forms the foundation for obtaining valuable insights. Start by inventorying the relevant systems and files, such as sales administration, customer database, and inventory management. It is important to check whether this data is current and complete, as outdated or incomplete data can undermine the reliability of the analyses.

A common pitfall is accidentally connecting the wrong datasets, for example, a test file instead of the live data. This can lead to incorrect conclusions. Therefore, it is advisable to ask a simple control question after connecting, such as requesting the revenue from the past month, to verify whether the Data agent can retrieve the correct data.

Fictitious example: An online store accidentally connects an old inventory list from the previous year. As a result, the Data agent reports incorrect inventory levels. By asking for the current stock of recently sold products and comparing this with the physical stock, this error can be detected and corrected.

Use a checklist to assess the connection: are all necessary data sources connected, is the data current, is the data structure correct, and can the Data agent retrieve the data? Perform these checks regularly, especially when data sources change, to ensure data quality.

02

Analyzing Data: Asking Clear Questions

After connecting data sources, you can deploy the Data agent for analyses. It is crucial to formulate clear and specific questions, for example: 'Which products sold best this month?' or 'What is the average customer value?'. Vague or too broad questions can lead to general or unusable answers.

Fictitious example: The question 'How is my webshop doing?' is too general and results in a superficial overview. A more targeted question such as 'What is the revenue per product category this month?' provides more concrete and useful insights.

Compare the outcomes of the Data agent with known facts or other reports to test reliability. If the agent indicates that a product sold well, check whether this corresponds with the sales administration. In case of discrepancies, it is advisable to review the data and the question formulation.

A checklist for effective analysis includes: is the question specific, is the data relevant, are the results logical, and are the outcomes verified with other sources? By following these steps, you increase the quality of analyses and better support well-founded decisions.

03

Distinguishing Safety Stock and Desired Inventory Coverage

In inventory management, it is essential to distinguish between desired inventory coverage and safety stock. Desired inventory coverage is based on expected demand, while safety stock forms a buffer against uncertainties such as delivery delays or unexpected demand peaks.

Fictitious example: If you expect to sell 100 units of a product in a month (desired inventory coverage) and additionally keep 20 units as safety stock, this helps prevent shortages. Not calculating this safety stock separately can lead to insufficient inventory and customer dissatisfaction.

Check your inventory planning by calculating both components separately and comparing them with historical data. Analyze the average lead time and demand variation to determine whether the safety stock is adequate without tying up unnecessary capital.

Use a checklist to optimize inventory management: is the desired inventory based on expected demand, is safety stock added, are these quantities regularly evaluated and adjusted when changes occur? This way, you prevent inventory problems and keep operations running smoothly.

04

Critically Verifying Data Agent Results

It is important to carefully verify the results delivered by a Data agent. Do not blindly trust the outcomes, but compare them with other reliable sources such as manual reports or known figures. This helps prevent errors caused by outdated or incomplete data.

Fictitious example: A Data agent reports an overview of best-selling products that strongly deviates from the internal sales administration. By investigating these differences, it can be determined whether there is a problem with the data connection or processing.

Perform spot checks by comparing key figures with your own data. If there is agreement, more confidence can be placed in the other results. In case of discrepancies, it is important to identify the cause and implement corrections where necessary.

A checklist for verification includes: comparison with other sources, verification of current data, investigation of discrepancies, and documentation of findings. This routine contributes to the reliability of the insights provided by the Data agent.

05

Designing Interactive Dashboards with AI Support

A Data agent can assist in creating interactive dashboards that visually and clearly present business data. This facilitates recognizing trends and making decisions. Start by selecting relevant KPIs, such as revenue, customer retention, and inventory status.

Fictitious example: A dashboard shows revenue per product category alongside a graph of inventory levels. This provides at a glance insight into which products sell well and whether the inventory is sufficient. It is important to avoid the dashboard containing too much information, which can reduce clarity.

Test the dashboard with users, for example colleagues who work with it. Collect feedback on the clarity and usability of the information and adjust the design to improve user-friendliness.

Use a checklist for dashboards: are the KPIs relevant, is the presentation clear, is the dashboard interactive and customizable, and has it been tested by users? This ensures the dashboard becomes an effective tool in business operations.

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Security and Privacy When Using Data Agents

When connecting business data to a Data agent, attention to security and privacy is crucial. Determine which data is shared, who has access, and how the data is protected. The absence of appropriate security measures can lead to data breaches or misuse.

Fictitious example: Connecting customer data without encryption or access control can pose risks if unauthorized persons gain access to personal information. This can be prevented by using only anonymized data and setting strict access rights.

Check security by inquiring about the Data agent's protocols and testing whether unauthorized persons have no access. Document which data is connected and ensure compliance with relevant privacy legislation, such as the GDPR.

A checklist for security includes: data encryption, access controls, a privacy policy, and training employees in secure data use. By implementing these measures, you protect business data and strengthen the trust of customers and employees.

Sources and acknowledgements

Created with AI and automatically reviewed. This is not human editorial approval. Examples are fictional unless stated otherwise. 13-9-2026

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<https://www.8eon.nl/dashboards>

Now everyone can put data to work

<https://www.8eon.nl/blog/3a8169d7-40cc-4d17-8d08-f3e2897c9042>

An overview for your business

Explore the interactive examples at www.8eon.nl/dashboards. Discuss the question you want to answer and the data you need.