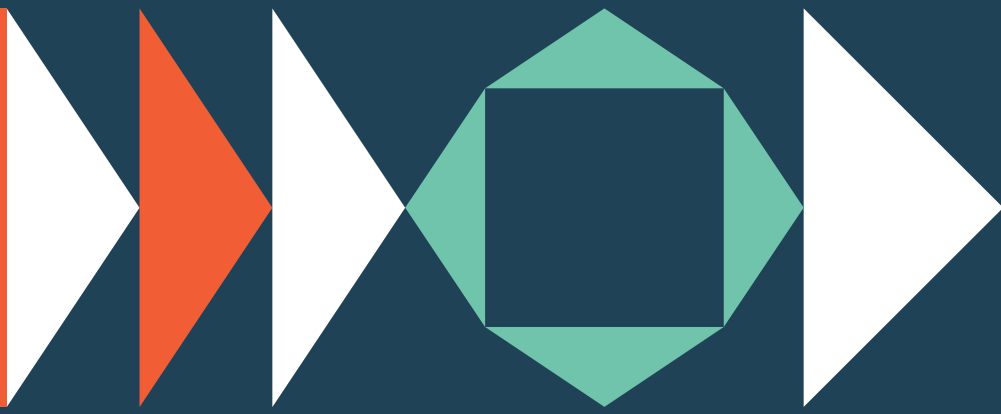
Becoming conversant on the **Databricks Data Intelligence Platform**

Unlock the full potential of the Databricks DI Platform with our interactive whiteboard session. Designed for Databricks Partners, this workshop will offer an immersive experience to master the data and Gen AI conversation and drive future consulting annuities.



Playbook Contents

Introduction to Whiteboard Workshop

Introduction to the Partner Whiteboard

Welcome to the Databricks Partner Whiteboard Playbook. This guide is crafted to equip you with the insights and narratives that are central to understanding and leveraging the Databricks Data Intelligence Platform. As we navigate the complexities of today's data landscape together, this playbook serves as your blueprint for mastering the art of the whiteboard conversation — **a tool that will become invaluable in your strategic discussions.**

In the span of the live workshop, you'll gain a thorough understanding of the Databricks Lakehouse architecture and DI Platform and their unique position in today's market. This whiteboard approach is **designed to crystallize our collective vision for data management and AI,** empowering you to convey our innovative solutions effectively to your customers.

This session is more than an educational endeavor; it's an opportunity to **align on the principles that will shape the future of data and AI.** By the end of this workshop, you'll have the expertise to sketch out the transformative power of the Databricks platform on any canvas, from a formal presentation to the back of a napkin. Let's step forward into this collaborative session, prepared to shape the narrative of data intelligence together.

This Workbook contains 4 sections:

1. **Introduction:**
   Personas for the whiteboard, value levers for data and AI, and common AI use cases and challenges - use these to customize your whiteboard

2. **Step-by-Step Whiteboard:**
   The end-to-end whiteboard

3. **Exclusive Offer for Attendees:**
   Badge your larger teams on YOUR whiteboard through Databricks Partner Academy

4. **Resources:**
   Data and GenAI Value Levers, Conversational Guides, and customer facing proof points

Personas We Are Targeting for Lakehouse & GenAI

Buyers

- Data Science or ML Platform Leader (CDO, VP, Dir)
- CIO/CTO
- VP/Director of Data Science
- VP/Director of AI/ML teams

Influencers

- Data Platform Leads
- Data Architects
- Business Analysts

Practitioners

- ML Engineers
- Data Scientists

When to deliver the whiteboard

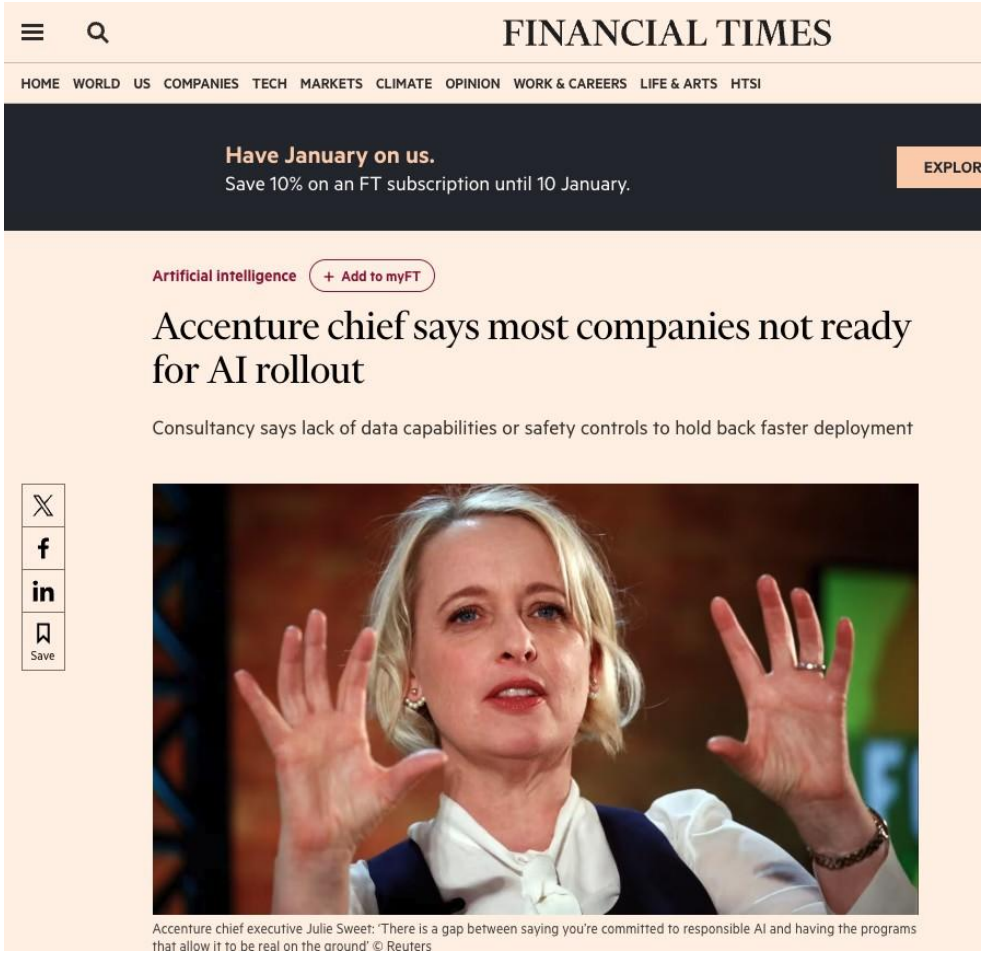
Deliver the whiteboard where you might otherwise deliver your pitch deck. Consider it a more interactive & collaborative format, typically delivered early in the sales cycle to provide a high-level introduction to Databricks and our point of view on data and AI.

Value Levers for Personas

Value Levers	 **Eliminate Cost and Complexity** Unification allows all data and AI use cases to be performed directly on one copy of all of your data with up to 8x better price/performance than other cloud data platforms. Building on a single, multi-cloud Data and AI platform eliminates duplicative costs in tools, storage, redundant processes and training.	 **Accelerate Innovation** Every company must accelerate AI-driven innovation across their business or risk being disrupted by faster-moving competitors. Building on a unified Data and AI platform breaks down data and organizational silos, allowing the right teams to collaborate on the right data in real-time, accelerating projects from experimentation to production.
Personas	**CIO**	**CDO**

Common Challenges around GenAI

In 2024, immature data capabilities & lack of controls slow AI adoption



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EXPLOR

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Accenture chief says most companies not ready for AI rollout

Consultancy says lack of data capabilities or safety controls to hold back faster deployment

Save

Accenture chief executive Julie Sweet: 'There is a gap between saying you're committed to responsible AI and having the programs that allow it to be real on the ground' © Reuters

Source: Financial Times, December 19, 2023

Takeaways

- **Bookings for AI projects have jumped** as customers seek trusted advisors to guide them in the transformation journey.
- **But, most companies not ready** to deploy AI solutions. Major blockers:
  - **Immature data capabilities:** If companies can't use their data, they can't use AI. The biggest way AI can be useful is when it's unleashed on a company's data.

    The DI Platform solves this.
  - **Lack of safety, privacy controls and risks:** There's a gap between saying you're committed to responsible AI and having the programs that allow it to be real on the ground. What are risks and how are they mitigated?

    Unity Catalog solves this.

Common Generative AI Use Cases by Industry

Abbreviated inventory of working use cases on the DI Platform

Financial Services

- Corporate filings, earning calls and market intelligence
- Extracting ESG strategies and initiatives
- Claim assessment, fraud and irregularities
- Accelerated underwriting, policy reviews and comparisons
- Customer Service Support - Automation, Q&A, etc.
- Model risk management documentation
- Automated data ingestion for quantitative analytics
- Wealth Management & next best action
- Search engine for policies and regulations
- New joiner onboarding

Healthcare & Life Sciences

- Patient / Member Engagement
- R&D / Medical Affairs report summarization
- Customer Segmentation & Sentiment
- Next Best Action (Transcripts)
- Medical Literature Synthesis
- Drug Repurposing
- Clinical Trial Analysis
- Personalized Medicine
- Medical Information / Benefits Retrieval & Summary
- Clinical Decision & Care Coordination Decision Support
- Medical Education & Training
- Medical Coding & Billing
- Prior Authorization Automation

Comm, Media & Entertaiment

- In-App Content Discovery / Search
- Content Localization
- Content Creation
- Content Production
- Content Library Metadata Tagging
- Personalized Email/Digital Marketing Creation
- Concept Art (Gaming)
- Product / Game Review
- Customer Support / Call Center Operations
- Field Operations Support

Retail & Consumer Goods

- Product Search
- Image Based Search
- Customer Service Routing & Chat-bot
- Product Recommendations
- Personalized Content Generation
- Image Generation
- In-store Kiosk
- SEO Optimization
- Competitor / Market Summarization
- Document Discovery

Manufacturing

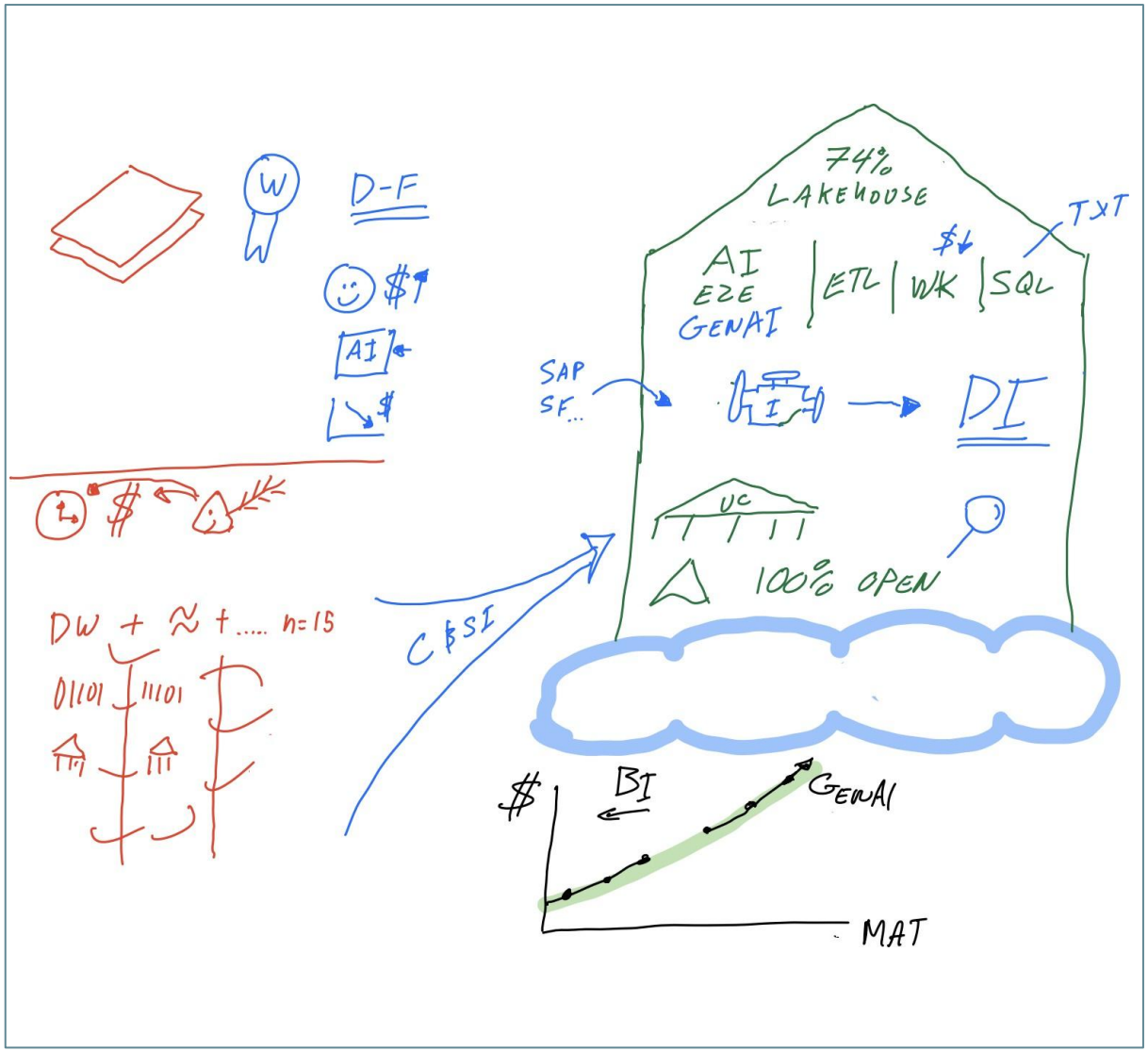
- Conversational AI for Smart Cockpits
- Field service troubleshooting & support
- Prescriptive Maintenance Actions
- Technical summarization (SOPs, Work Instructions, etc.)
- Automated analysis for daily production / shift reviews
- Augment OT development teams
- Design/engineering change analysis
- Training - Capture & disseminate domain knowledge

Cybersecurity

- Natural language querying of logs / telemetry data
- Incident investigation co-pilot
- Detecting AI-generated artifacts (eg. malware, deepfake)
- Q&A+summarization for security policies, and threat intel knowledge base

Step-by-Step Whiteboard

Completed Whiteboard



Tips and Tricks

1. Use colors. Green for good, blue for cloud
2. Keep it simple - don't use sentences
3. Use simple icons or abbreviations
4. Use the whiteboard medium to its full potential: cross things out, connect ideas, circle things, erase things
5. Make it your own. There are suggestions how to do this in the step-by-step that follows
6. In real life, use the whiteboard to facilitate discussion, collaboration and discovery

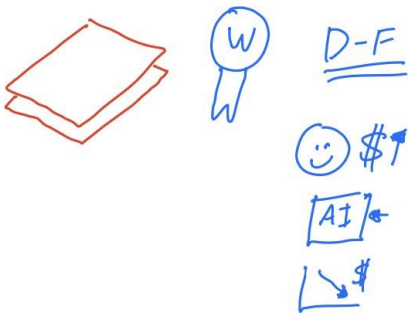
STEP 1

Set the Data and AI Vision

What to Say

1. Databricks is the Data and AI company
2. Our mission is to democratize data and AI
3. Databricks is recognized by Gartner as a Leader in both
   - Database Management Systems
   - Data Science and Machine Learning Platforms
4. The winners in every industry will be data + AI companies
5. <Example Customer data and AI Story>
6. Organizations want to be data-forward: to leverage AI across the org to:
   - Drive customer revenue through relevant personalization
   - Be more competitive by building AI into products and services
   - Lower operational costs

What to Draw



Delivery Notes

- Be inspirational! Start positive. Set the big, thought leader vision of where companies are going with data and AI
- Ask questions about big AI related initiatives. Ask about GenAI industry use cases. Ask about business metrics they want to achieve

Make it your own

- Use your own common industry use cases (see industry slide)
- Summarize your company's vision for helping customers succeed with data and AI

STEP 2

Build up the current state challenges most orgs face

What to Say

1 However, for most organizations, it's too costly in terms of time and money

2 Let's talk about how we got here. We can visualize this through a data maturity curve

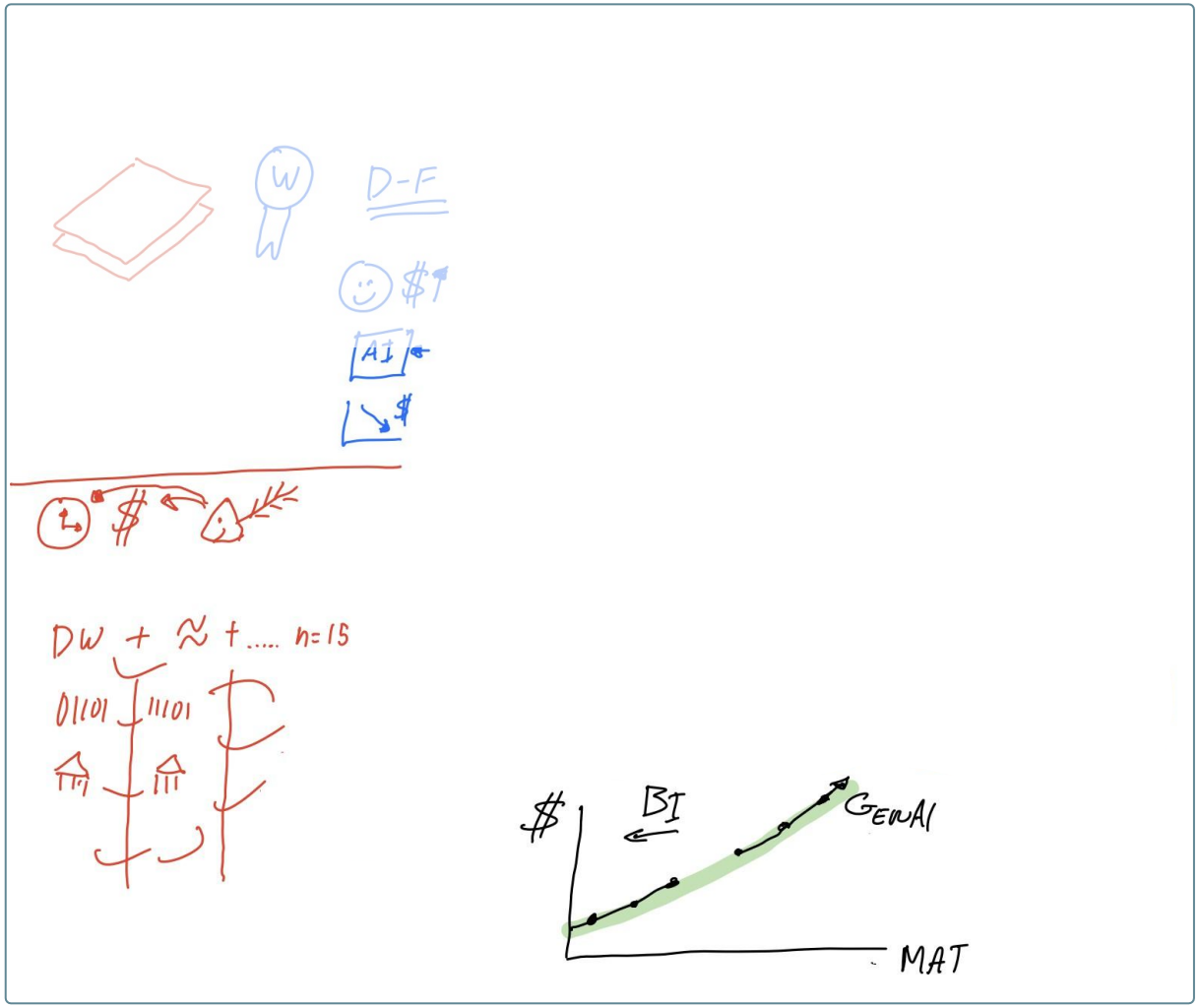
- X-axis represents maturity of required capabilities for data & AI
- Y-axis represents business value delivered
- Orgs have been asked to deliver BI, then big data, then real time, then AI then GenAI

3 The root cause (fishbone diagram) of the high cost and long time to value is organizations have added multiple data platforms over time to meet these required capabilities. They've added a Data Warehouse, then a Data Lake, then an orchestration platform. It goes on. Some organizations have 15 data platforms. This additive approach creates more silos

- Duplicate data
- Duplicate governance
- Neet to hire and retain highly technical teams

4 With this additive, siloed approach, everything gets worse as new required capabilities added

What to Draw



Delivery Notes

- **Really spend time on pains.** This is where great discovery happens if you are in an interactive setting
- **Ask questions:** What systems do you have? How are you going to add AI?

Make it your own

- Use common systems that your customers use
- If there are other pain points beyond cost and slow innovation, use those

STEP 3

The Lakehouse addresses and solves the issues

What to Say

1. In 2020, Databricks created the lakehouse category to address the challenges of this fractured
architecture by unification & simplification
2. Build the lakehouse from the ground up

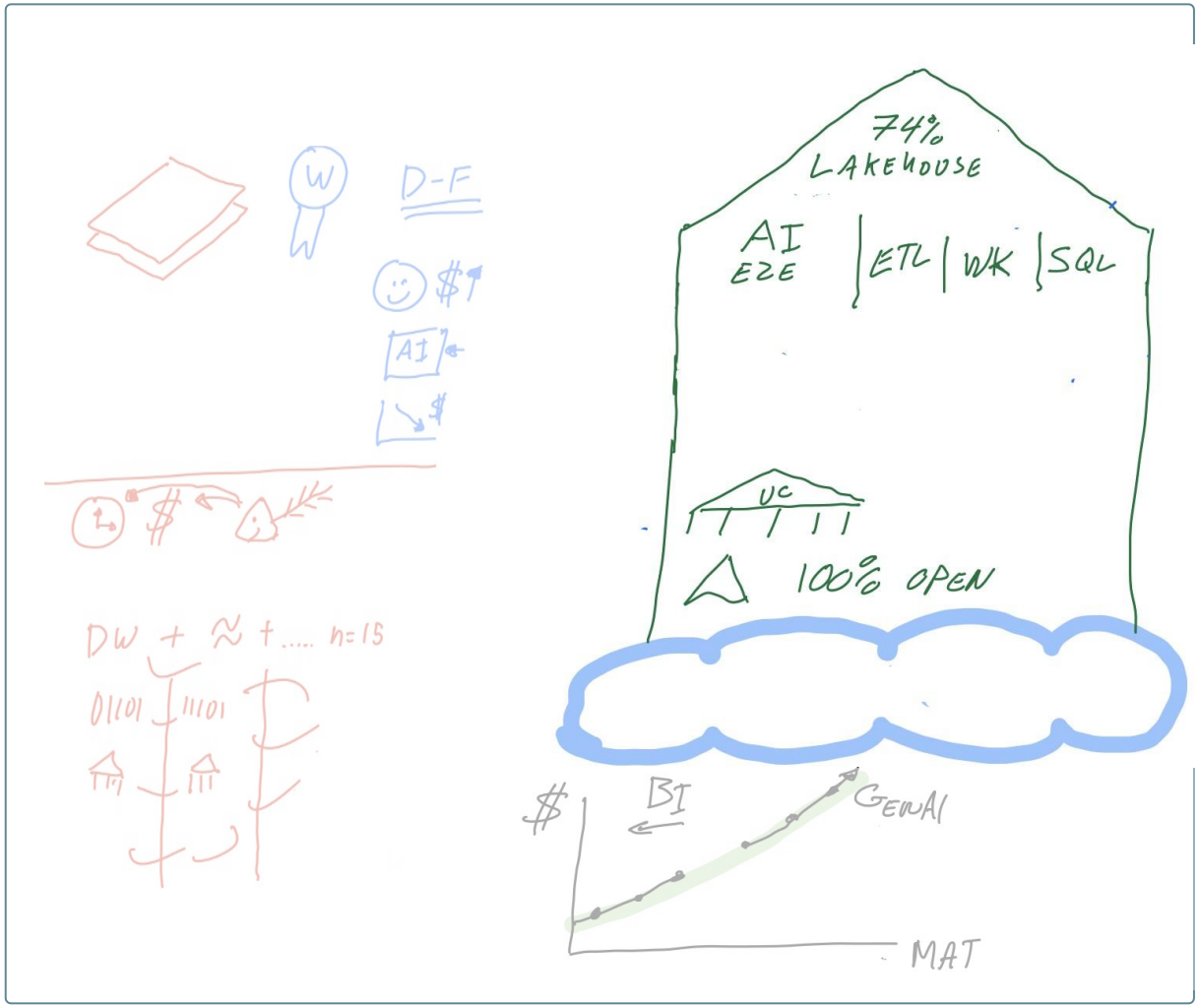
3. It begins with where customer data is: the cloud object stores
   - The clouds are engineering, go-to-market partners

4. Then the data is unified under an open management layer to provide reliability and open sharing.
This is called Delta Lake
5. With one consistent approach to security, governance, and cataloging called Unity Catalog

6. Then, on this lakehouse foundation, being able to operate all data and AI workloads
   - SQL and Data Warehousing
   - Orchestration and
   - Workflows ETL and real time
   - AI with end-to-end model lifecycle management and serving

7. Today, 74% of global CIOs report that they have a lakehouse in their estate and most of the remainder intend to have one within the next three years

What to Draw



Delivery Notes

- Stress that the Lakehouse is the obvious way to do data management
- You don't need to go too deep on features. The high level message is unification simplifies everything and reduces cost

Make it your own

- Focus on downstream workloads that make sense for your audience. For example, if they are working on SQL, cover that
- A great place to start is ETL and Data Engineering. It is a big cost for most businesses and Databricks will lower costs significantly

STEP 4

Lakehouse + GenAI = Data Intelligence Platform

What to Say

1. While lakehouse adoption has already become a force in the market

2. There's been another rapidly rising technology called generative AI

3. You might be familiar with the MosaicML acquisition Databricks

4. We brought these two technologies together to create a new category of data platform - the Data Intelligence Platform (DI)

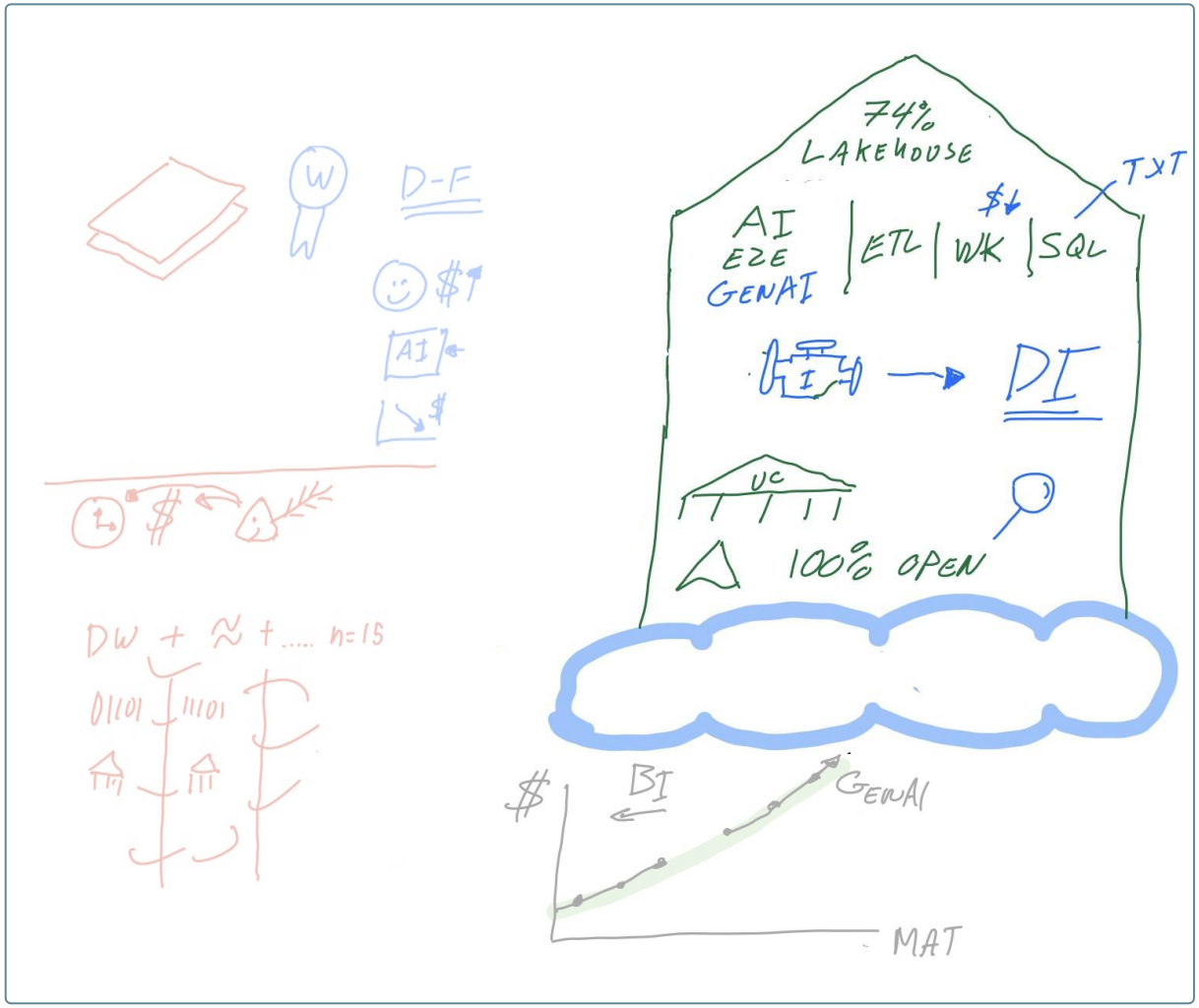
5. This opens up a whole new world of possibilities to democratize data and AI across an organization

6. We infuse the lakehouse with AI to understand the semantics of your data and use that understanding across everything in the platform.

- In Unity Catalog, you can securely find data and understand tables with natural language that uses your company jargon
- In Delta Lake, the AI is able to automatically optimize the data
- In data warehousing we deliver simplicity through text-to-SQL
- For workflows, AI automatically selects the right instances
- For ETL - provides automated quality control
- For AI, not only is traditional AI simpler through natural language, but now you can create, tune, manage and serve LLMs

7. The DI Platform is **accessible** to everyone through natural language, **simple** to operate and **private** with your AI models on your data

What to Draw



Delivery Notes

- Be inspirational - the Data Intelligence Platform will democratize data and AI at a scale never realized before

Make it your own

- Talk about challenges or successes you are seeing with your customers around adoption of GenAI
- Talk about challenges this overcomes. Two of most common challenges are immature data management & lack of safety (see challenges page)

STEP 5

The partner ecosystem accelerates customer success

What to Say

1. Databricks has an amazing partner ecosystem

2. We partner with the leading C&SI organizations who act as trusted advisors to their customers.
   - We've trained, badged, and enabled tens of thousands of partners to help migrate their clients from the expensive, fractured legacy architecture to the Databricks Data Intelligence platform

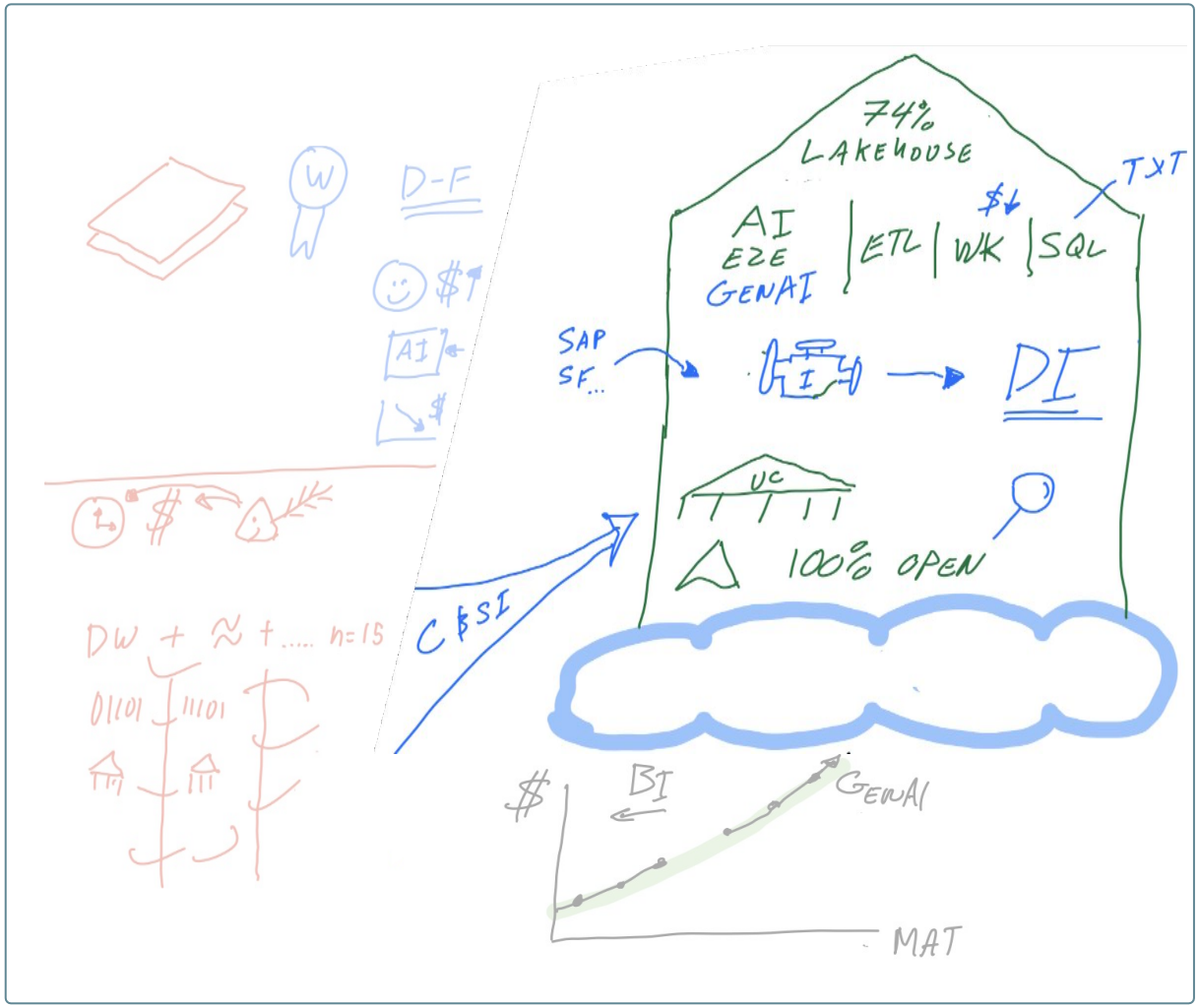
3. This is critical as there has been a huge increase in demand for generative AI by customers across the board

4. The Data Intelligence Platform overcomes the two largest obstacles to AI that customers face:
   - Poor data management from legacy architecture
   - Poor governance from legacy architecture

5. ISV Partners are also critical to customer success. Databricks is part of a much larger open data ecosystem. ISV partners like dbt, SAP and Salesforce allow customers to add mission critical data to the DI platform in a few clicks, unlocking new use cases and business value.

6. Ultimately, companies using the DI platform and working with trusted partners to accelerate successful adoption will help customers become data forward, reduce TCO, accelerate innovation and win in their industries.

What to Draw



Delivery Notes

- Bring it back to the goals and customer success outlined in Step 1
- Cover the partner ecosystem. C&SI and ISV partners are critical for success.

Make it your own

- Focus on ISV data sources your customers use (ex. SAP)
- Talk about use cases enabled for your customers from the addition of ISV data such as SAP and Salesforce

Exclusive Offer

Tailored Data Intelligence Platform Whiteboard Leadership Badge

Available on-demand in Partner Academy

Live at Partner Kickoff Feb 7, 2024 | Las Vegas

- Your unique GTM partner strategy tied into the DI Platform Whiteboard delivery
- Available on demand in the Partner Academy exclusive to your partner team
- Proctored results to connect top of the funnel knowledge

Kori O'Brien
SVP, Global Partnerships

Tom Molyneux
Director Sales Enablement

Dael Williamson
Field CTO EMEA

Audience
All Customer facing roles. There are no prerequisites required.

Content
The learner will become conversant and demonstrate foundational knowledge of the Databricks Data Intelligence (DI) Platform and your unique partner GTM strategy. The session will cover the market opportunity, challenges of business leaders, how the Databricks DI Platform uniquely addresses them. It will cover reduced TCO while accelerated innovation and how the DI Platform supports the rise of generative AI

Learning Experience
This online course is 40 minutes in total, delivered by Databricks in tandem with our partners to be able to easily explain to executives what the DI Platform means for a customers Data and AI strategy with an exercise to validate the learning is able to be demonstrated by Databricks partners

Time
40 minutes

Click here or scan the QR to access course

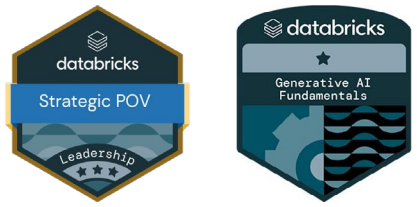
Resources

Sales - Delivery Trainings

Enabling you to fill the Top of the Funnel & Deliver

All Partner roles and functions

Begin Here



Consultants, Sellers, Field Engineering & Architects

Sales & Pre Sales

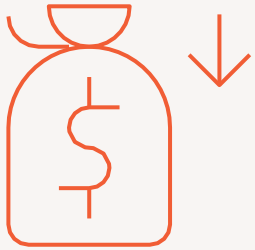
Solutions / Field / Sales Engineering & Architects

Pre-Sales

Brick by Brick Podcast

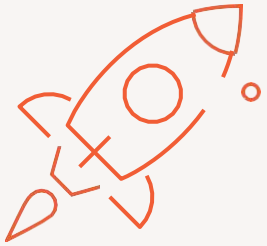
- Partner Pre-Sales Role Focus: Leadership, Seller, SE/SA & Architects Alignment with partner GTM ecosystem
- Exciting topics and use cases to grow your Data & AI practices
- Competitive customer examples with products, architecture concepts strategies

Customer Value Levers



Eliminate Cost and Complexity

Unification allows all data and AI use cases to be performed directly on one copy of all of your data with up to 8x better price/performance than other cloud data platforms. Building on a single, multi-cloud Data and AI platform eliminates duplicative costs in tools, storage, redundant processes and training.



Accelerate Innovation

Every company must accelerate AI-driven innovation across their business or risk being disrupted by faster-moving competitors. Building on a unified Data and AI platform breaks down data and organizational silos, allowing the right teams to collaborate on the right data in real- time, accelerating projects from experimentation to production.

You're a Data & AI Company.

The Discovery Conversation

Current State

Multiple data platforms are deployed across different workloads (data lake, data warehouse, ETL, data science, AI and BI)

This creates multiple copies of data locked into disparate silos, each with its own toolset.

Governance is implemented differently within each silo, and teams become siloed through the data and tools they have access to.

Many of these silos are built on proprietary technology.

Negative Outcomes

The environment is unnecessarily expensive and complex, which leads to **longer time-to-value**. You're dealing with a huge amount of data movement and maintaining multiple copies of data that are driving high operational costs.

You have multiple governance models that make it hard to know what's correct and who has access to it

Your data and AI practitioners aren't able to work efficiently together, getting slowed down with a lot of high-friction handoffs between systems.

Proprietary investments inevitably lead to s**lower innovation cycles** due to incompatibility with new technology and lock-in related **cost pressures** (licensing costs, maintenance, etc.), as well as difficulty sharing data outside of the walled gardens of each proprietary platform.

Future State	Positive Outcomes
All analytics and AI use cases are performed directly on one copy of the data.	Data, insights and models are available in **real-time**, workloads scale **without runaway costs**, and increased efficiency allows you to **ship more initiatives to production**.
One unified platform to store and manage all structured, semi-structured, and unstructured data.	Eliminate duplicative costs in storage and complex data engineering.
One unified security and governance model for all data access across the organization.	The right teams get access to the right data at the right time, and you're able to understand how data is acquired, changed, used and impacted across every analytics and AI workload.
One unified, multi-persona approach to allow all data workloads to operate on the same data.	Functional silos are reduced making collaboration much easier.
The data platform is underpinned by an open foundation that makes it easy to integrate and share data.	Open source and open standards allows teams to easily integrate with tools they have today, adopt new technologies tomorrow, and reliably share data with stakeholders regardless of platform.

Discovery Questions

Current State

How are things working now?

Top Company Data and AI initiatives

What are your most important Data and AI initiatives?

How will you leverage AI and LLMs to drive business-results?

Operational Costs

Many of our customers are experiencing cost pressures as data volumes and AI workloads explode. What are your 2-3 biggest challenges with the cost of your data platforms?

Where are your biggest costs across your data and AI workloads?

How are you managing the costs of using multiple data systems?

Pace of Innovation

What are you doing to accelerate your time to production for data and AI projects? What are the biggest bottlenecks, and how many steps does a typical project need?

What's the distribution of time your teams are spending on maintenance vs new initiatives?

How important is real-time to your data strategy?

Overall Complexity

Where are you in your journey of becoming a data and AI driven company?

Describe your cloud strategy? What is your vision for migrating on-prem solutions to the cloud?

Describe your confidence level in meeting the needs of your business.

What are the biggest challenges in executing the data strategy?

Governance

How are you managing security/governance across data lakes, DWs, AI and streaming systems?

Open

How important is avoiding lock-in or integrating with a broad ecosystem of tools?

Future State

How would you like things to be?

Unification of data and AI

How much would consolidating to a single data platform reduce your cost?

How could a single data platform across multiple clouds lower your costs?

How valuable would it be to run your AI and analytics directly on your data lake rather than being dependent on a separate Data Warehouse?

Unification of workloads

What would effective collaboration look like between your data teams?

What benefits do you see if all your teams operated on one copy of data across multiple use cases?

How would your ability to innovate be impacted by having one system from raw data to insights?

How does real-time processing support specific business cases and what SLA's are required?

Unification of governance

How would unified governance of all data, analytics and AI assets reduce your risk and accelerate innovation?

Open

How can you avoid vendor lock in going forward? What role do open formats play in vendor portability?

How can you avoid vendor lock in going forward? What role do open formats play in vendor portability?

Value Proof Points

Awards / Benchmarks

TPC-DS World Record | 2021

Databricks sets official data warehousing performance record

TPC-DS Blog

SIGMOD Photon Paper | 2022

Photon: A Fast Query Engine for Lakehouse Systems

Link to Paper

Analyst Reports / Studies

Ventana Research Report

Databricks Lakehouse Platform Maximizes Analytical Value

Link to Report

Gartner | Magic Quadrant

Leader in both cloud DBMS and DSML magic quadrants.

Link to DBMS

Link to DSML

Databricks Reports/Studies

Lakehouse Benchmark

"Databricks was 2.7x faster and 12x better in terms of price performance than Snowflake"

Link to Blog

MIT Technology Review: CIO Vision 2025

"72% of CIOs say that data is the biggest challenge for AI and 68% say unifying their data platform for analytics and AI is crucial"

Link to Paper

CIDR Lakehouse Paper

"Lakehouse: A New Generation of Open Platforms that Unify Data Warehouse and Advanced Analytics" Seminal work on lakehouse paradigm authored by Databricks co-founders and engineers

Link to Paper