

COSMOS

The AI-Ready Reporting Playbook

How Business Central Users Can Catch Up Fast



Table of Contents

AI Has Evolved Faster Than Your Reporting	3
Play 1: Spot the Hidden Legacy in Your Reporting	4
Play 2: Accept That AI Will Magnify Your Reporting Problems	5
Play 3: Break the Double Sunk Cost Trap	6
Play 4: Understand What “AI-Ready” Actually Means	7
Play 5: Turn Business Central Into an AI-Ready Reporting Platform	9
Play 6: Learn From Companies That Fixed Reporting Before They Touched AI	10
Play 7: Act Now Before the Gap Widens	11
What to Do Next	12
About Cosmos	13



AI Has Evolved Faster Than Your Reporting

In the past few years, businesses have watched as AI has rapidly shifted from a side project to a board-level priority. **Between 78% and 88% of organizations now use AI in at least one business area**, with most applying it across multiple functions. Additionally, 99% of executives **in a recent global survey** identified AI and data as top priorities and plan to increase related investments. The market has made it clear: AI is now integral to business growth strategies.

But there is a second, less glamorous story running underneath the hype. Most mid-market companies built their reporting around older Dynamics versions, on-premise customizations, and spreadsheets—long before AI was on the roadmap. Those reporting foundations were never designed for models that need consistent, connected, governed data to be trusted. The result: budgets shift to AI, roadmaps fill with “Copilot” and “automation,” but the reporting layer underneath looks exactly the same.

This playbook is for Business Central customers living in that gap. There are plenty of resources that already exist that will help you write prompts—this is about showing you how to get your reporting house in order so AI can actually help, using **Cosmos** as the AI-ready reporting layer that sits on top of Business Central Cloud.

PLAY 1

Spot the Hidden Legacy in Your Reporting

When people say “legacy,” they usually point at the ERP: NAV, GP, or a heavily customized on-prem system. The underlying software can certainly be a part of legacy builds, but for most finance and operations teams, legacy lives in less obvious places:

- A Business Central environment with years of customizations no one wants to touch.
- Bolt-on reporting tools and add-ins known by only one or two “wizards” in the company.
- Reports spread across shared drives, email threads, and shadow systems IT never approved.
- Month-end processes that depend on exporting everything to Excel and “fixing it” manually.

If answering basic questions—“What did we actually make on this product line?” or “Which entities are dragging margin down?”—requires a spreadsheet marathon, you are not running a modern reporting stack, no matter what version your ERP is on.

This is technical debt in reporting form. Every extra month you keep patching around the same issues, you’re quietly adding more:

- More effort spent maintaining outdated reports instead of improving them.
- More risk as critical logic lives in personal workbooks and undocumented scripts.
- More resistance to change from people who have built their own workarounds.

None of this appears as a neat line item on your P&L. It shows up as slow closes, painful reconciliations, and nervousness about which set of numbers to believe. The first move in any AI-readiness playbook is simply to admit how much of your reporting still runs on legacy assumptions and spreadsheet heroics.

PLAY 2

Accept That AI Will Magnify Your Reporting Problems

There is a hopeful myth that AI will “clean up” messy reporting. In reality, AI learns from whatever you feed it. If your history is inconsistent, fragmented, or poorly governed, AI will confidently amplify those flaws.

You are already seeing the symptoms of “not AI-ready” if:

- Different teams present different numbers for the same KPI in executive meetings.
- Key data is scattered across ERP, CRM, spreadsheets, and niche tools, with no single source of truth.
- No one can answer “where did this number come from?” without opening multiple files.

Now imagine layering AI on top. Forecasts built on conflicting data. KPIs surfaced to the board that no one can trace. Automated summaries of reports that were wrong to begin with. **Analysts estimate that roughly 60% of AI initiatives will fall short of their value targets** over the next few years, and poor data and governance are consistently cited as the main reason.

In other words: AI does not fix a shaky reporting foundation. It puts a spotlight on it. The organizations that win with AI are the ones that treat reporting quality as a prerequisite, not an afterthought.

PLAY 3

Break the Double Sunk Cost Trap

Most finance leaders recognize the sunk cost fallacy when they see it: past investments that keep influencing current decisions more than they should. In technology, it sounds like:

- “We have so much invested in NAV/GP; we need to squeeze a few more years out of it.”
- “We spent a fortune on that reporting add-on; we cannot just walk away.”
- “The team has spent years perfecting those Excel models; we can’t change everything now.”

It is understandable. Those systems, tools, and spreadsheets represent real money and real effort. But clinging to them has a quiet price. It locks in technical debt, keeps talented people focused on maintenance instead of improvement, and makes every new initiative harder than it needs to be.

The more dangerous version is the “future sunk cost” you are agreeing to without realizing it. When you push off modernizing your reporting and data foundation, you are virtually guaranteeing:

- AI pilots that burn time and budget trying to work around bad, fragmented data.
- “Proof of concept” dashboards that look impressive but cannot be fully trusted.
- Cleanup projects to retrofit governance after AI outputs raise uncomfortable questions.

You end up paying twice: once to keep the old reporting stack alive, and again for AI projects that never had a fair shot at success. Breaking this cycle starts with a simple mental shift: stop asking “How do we get a bit more out of what we already bought?” and start asking “What reporting foundation do we need if AI is going to be core to how we run the business?”

PLAY 4

Understand What “AI-Ready” Actually Means

1. Everyone agrees on the numbers.

Finance, sales, and operations share the same definitions for revenue, margin, on-time delivery, backlog, and other core KPIs. If you ask three teams for gross margin, you get one answer—not three spreadsheets with slightly different logic. Agreement on definitions is the foundation; the technology comes after.

2. There is a single reporting layer AI can trust.

Instead of pointing reports and AI tools directly at raw ERP tables and exports, you have a normalized, business-friendly data model that reflects how your company actually operates. Cosmos does exactly this for **Business Central and Dataverse**—reshaping raw data into a structure finance and operations teams can understand and work with. This is the layer AI should see first.

3. You can answer “where did this number come from?” immediately.

Line-of-business leaders, auditors, and eventually AI models all need lineage. You should be able to trace critical metrics back through systems, transformations, and rule changes, with access controls that protect sensitive data. That traceability is what turns AI from a “black box” into an extension of a reporting system you already trust.



PLAY 4

Understand What “AI-Ready” Actually Means

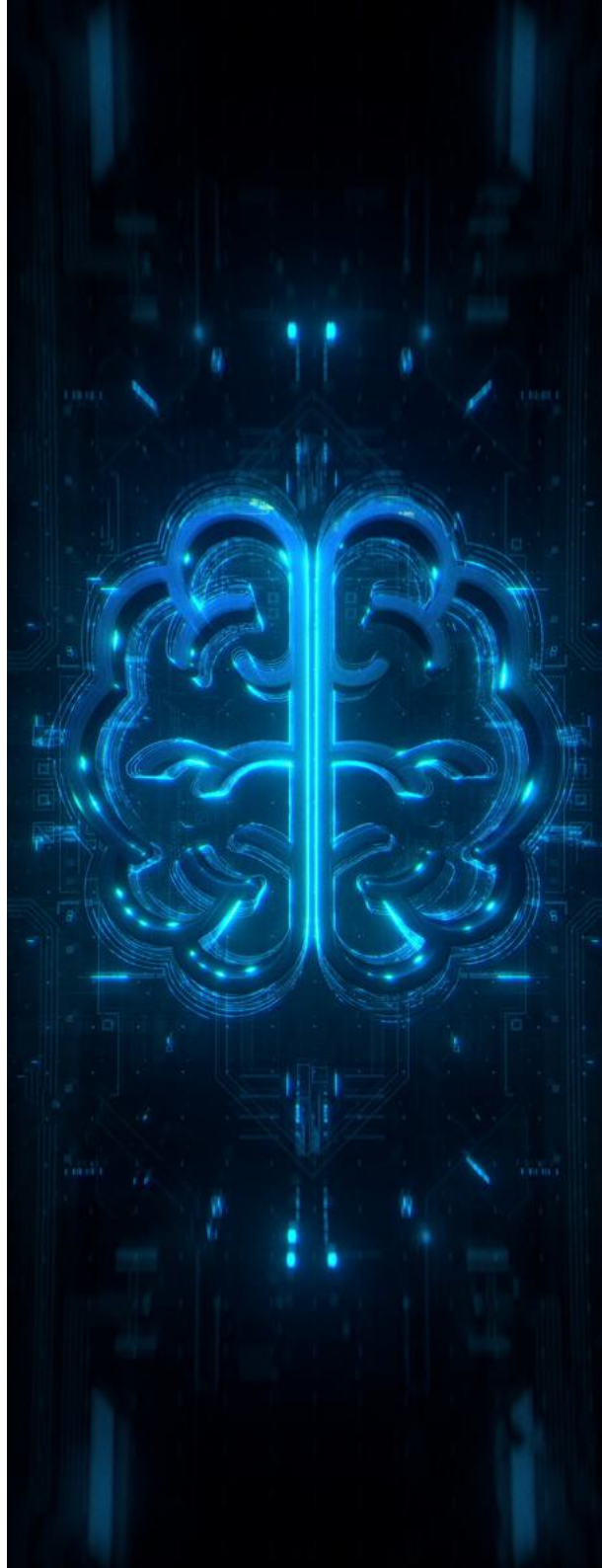
4. Reporting logic is built once and reused.

Joins, business rules, and calculations are captured in shared, governed models—not reinvented every month in dozens of personal workbooks. Cosmos exposes this reusable logic through **Excel** and **Power BI** so business users can self-serve without eroding consistency. Over time, reporting becomes a repeatable process, not a heroic monthly scramble.

5. You have a clear, realistic data strategy for AI.

You know which decisions AI will support and which data those decisions depend on. Organizations that get real value from AI almost always do the same thing in the same order: they fix data ownership and reporting first, then layer AI on top as an accelerator—not as a magic eraser.

None of this requires a huge data science team. For most Business Central customers, it requires the right reporting platform, the right structure, and a willingness to retire legacy habits that no longer serve the business.



PLAY 5

Turn Business Central Into an AI-Ready Reporting Platform

If you strip away the buzzwords, “AI-ready reporting” for a Business Central customer comes down to one practical question: how easily can your teams get to consistent, trustworthy numbers that reflect how the business actually runs? Cosmos exists to make that answer “very easily.”

For a nontechnical executive, you can think of Cosmos this way: it is a cloud-born reporting and analytics platform built specifically for Business Central Cloud. It does not replace BC. It sits on top of it and does three important things extremely well:

Builds a normalized, business-friendly data warehouse.

Cosmos takes Business Central and Dataverse data and organizes it into a model that mirrors how your business operates—entities, dimensions, and relationships that make sense to finance and operations. Instead of sending AI (or analysts) into a thicket of raw tables, you point them at a curated, governed model.

Delivers an Excel-first experience plus simpler Power BI.

Cosmos gives your finance and operations teams the ability to design, refresh, and share reports in tools they already know—especially Excel—while still fitting into your BI and Power Platform strategy. That means you can modernize reporting without asking everyone to become a data engineer.

Puts reporting ownership in the hands of business users.

Because Cosmos is cloud-native and tuned for BC, business teams can own reporting logic and definitions, while IT focuses on governance and enablement instead of being the bottleneck. When the business can adapt reporting quickly, AI use cases can evolve just as quickly.

Cosmos is not an “AI feature” on its own. It is the layer that makes AI features in the Microsoft ecosystem worth paying for. With Cosmos plus Business Central Cloud, you are not asking AI to navigate years of legacy complexity. You are inviting it into a clean, well-structured reporting environment where it can actually help you move faster.



PLAY 6

Learn From Companies That Fixed Reporting Before They Touched AI

You do not have to imagine what this looks like—it is already happening.

One multi-entity services company was operating more than a dozen entities, with plans to double that through acquisition. Month-end consolidation had become a bottleneck built on fragile Excel links and manual corrections. By implementing Cosmos on top of Business Central, they created standard templates and fast-refresh reports they could roll out to every entity. They avoided hiring at least one additional full-time role just to keep up with reporting, and they now sit on a normalized, multi-entity data model ready for future AI-driven forecasting and performance analysis.

A mid-market distributor with serial acquisitions faced a different version of the same problem: each new entity brought its own definition of margin, on-time, and “customer.” Reporting across the group meant reconciling competing truths. With Cosmos, they centralized visibility, standardized definitions, and onboarded acquisitions into a shared reporting model, improving decision-making even before talking about AI. AI is now on their roadmap as an accelerator for a governed data layer—not as a bandage for conflicting spreadsheets.

These stories have a pattern. The breakthrough did not come from turning on AI first. It came from treating data, definitions, and reporting as strategic assets—then picking tools that make it easy for business users to own them. AI will matter a great deal for these companies, but only because they did the groundwork.

PLAY 7

Act Now Before the Gap Widens

Global AI spending is projected to exceed \$2–2.5 trillion in 2026 as organizations embed AI into their products and operations. At the same time, **analysts expect around 60% of AI initiatives to miss their value targets** because the underlying data and governance are not ready. That combination—massive investment plus high failure rates—means the gap between “AI leaders” and “AI busy” companies will widen quickly.

For Business Central customers, the decision point is now straightforward:

- Keep running reporting on a mix of legacy tools, customizations, and spreadsheets, and hope AI can work around it.
- Or deliberately build an AI-ready reporting foundation that gives AI something reliable to learn from.

The companies that are winning with AI did not start with AI pilots. They started by getting to consistent, governed, self-service reporting on top of a trusted data model. Cosmos was built to give mid-market BC customers exactly that, without requiring an army of data engineers or a multi-year project.

If you are not sure where you stand today, you do not need another experiment with a chatbot or a dashboard. You need a clear-eyed view of your reporting foundation.



What to Do Next

If this playbook describes your situation, the next step is not to buy more AI—it is to get specific about your data and reporting. A short, focused conversation can quickly tell you whether you are a few changes away from AI-ready, or whether you need a more structured plan.

Book a consultation with one of our AI-readiness specialists, and we will:

- Map how your critical KPIs are defined today—and where they drift between teams.
- Identify the gaps between your current Business Central reality and an AI-ready reporting model.
- Outline a staged path to clean, governed, reusable reporting that AI can build on.

The smartest businesses understand that they don't need to find every possible use case for AI and deploy it all at once; they start by understanding whether their data reporting foundation will enable AI—or hold it back.

[Book a Consultation](#)





ABOUT COSMOS

Cosmos is the first true cloud-based reporting, analytics, and data management system built for Business Central. It provides instant access to the insights, trends, and visualizations you need now – without the expensive investment in additional hardware and knowledge of complex data structures.

Cosmos Data Technologies was founded in 2019 by three industry veterans who saw an opportunity to provide a cutting-edge reporting, analytics, and data management solution specifically for Business Central cloud. Designed for business users, not technical resources, Cosmos is lightning-fast, easy to use, secure, and fully cloud-based via Microsoft Azure – reports are known to run at least 48x faster than other Excel reporting solutions.

Learn more at www.cosmosdatatech.com



BASM has provided implementation, consultation, customization and support for Microsoft Dynamics 365 Business Central (NAV) since 2009. We help small and medium sized businesses streamline business processes and enhance data visibility, in order to become more effective and profitable.