

Al-Powered Quarterly Business Review

Scenario

You're the QBR (Quarterly Business Review) lead at XYZ Retail. Leadership wants a data-driven readout comparing Q4 2024 and Q1 2025. You've got:

- Two CSVs of **business metrics** (sales, marketing, customer KPIs).
- An image of a churn-reasons table (OCR practice).
- A QBR outline to convert into slides.

Your goals:

1. Extract the truth from the data fast, 2) explain the "why", and 3) leave with a strong agenda + a first draft deck.

Tools You May Use

ChatGPT (with file + image input), ChatGPT in Code Interpreter mode (optional), Microsoft 365 Copilot (Word, Excel, PowerPoint), or your spreadsheet tool of choice.

Input Data Files

Use https://rkt.sg/tsps/05dsf

Task 0 — Personalize (1 min, optional but fun)

Pick a real persona (yourself or a peer). In later prompts, tailor recommendations (e.g., "for a Singapore SME in logistics").



Task 1 — Summarize Q4 2024 (Beginner, 6 min)

Input: BusinessMetrics_Q4_2024.csv

Deliverable: 5-7 bullet summary + 2 visuals.

What "good" looks like

- Totals, averages, and MoM deltas.
- Clear read on Sales, Marketing Spend, New vs Returning customers, Ratings/NPS, Conversion, Refunds.
- Visuals:
 - 1. Line chart: Sales by month
 - 2. Bar chart: New vs Returning customers by month

Model Prompt (paste after uploading the CSV)

Role: "You are a senior business analyst for a retail e-commerce SME."

Goal: "Summarize the quarter (Q4 2024) crisply and visually for an exec audience."

Data: I've uploaded BusinessMetrics_Q4_2024.csv with columns: Month,

Sales_Revenue_USD, Marketing_Spend_USD, New_Customers, Returning_Customers,

Avg_Customer_Rating, Website_Sessions, Conversion_Rate_Pct, Refunds_Count, Net_Promoter_Score.

Do:

- Compute for Q4: total & average Sales, total Marketing Spend, total New Customers, total Returning Customers, average Rating, average Conversion%, total Refunds, average NPS.
- 2. Produce a MoM table (rows=Oct, Nov, Dec; include Sales, Marketing, New Customers, Returning, Rating, Conversion%, Refunds, NPS) with MoM deltas.
- 3. Visualize:
 - o Line chart: Sales_Revenue_USD by Month
 - o **Grouped bar chart:** New_Customers vs Returning_Customers by Month
- 4. Flag any anomalies (e.g., conversions dip while traffic spikes).
- 5. End with 3 insights phrased as: Impact → Evidence → Hypothesis. Output format:
- "Q4 at a glance" KPI table
- 2 charts with titles and captions
- Bullet list of 3 insights



Task 2 — OCR the churn image & query it (Beginner, 6 min)

Input: ChurnReasons_Q4_2024.png

Deliverable: Top 3 churn reasons with counts + 1 visual.

Model Prompt

I'm uploading a PNG containing a churn table titled "Customer Churn Reasons — Q4 2024."

Do:

- 1. Perform OCR, output a clean table with columns Reason | Count | % of Churn.
- 2. Sort by Count desc; report Top 3 reasons with their percentages.
- 3. Create one visualization (bar/pareto) to show the distribution of reasons.
- 4. Recommend two quick-win actions to reduce churn in Q2. Output:
- Markdown table of OCR results
- The chart (with title, labeled axes)
- Top-3 list + 2 actionable recommendations

(Stretch: ask for a Pareto analysis: cumulative % line + 80/20 cutoff.)



Task 3 — Compare Q4 2024 vs Q1 2025 (Intermediate, 10 min)

Inputs: BusinessMetrics_Q4_2024.csv, BusinessMetrics_Q1_2025.csv

Deliverable: A clear differences table + 2 visuals + narrative.

What to include

- QoQ delta table (Q1 vs Q4) for: Sales, Marketing, New/Returning customers, Rating, Conversion%, Refunds, NPS.
- Visuals:
 - 1. Clustered bar chart: Q4 totals vs Q1 totals across major KPIs
 - 2. Scatter: Marketing Spend vs Sales (all months), with trendline and a short read on efficiency.

Model Prompt

You're my QBR analyst. I've uploaded two CSVs for Q4 2024 and Q1 2025 with the same schema.

Tasks:

- 1. Build a **QoQ comparison table**: For each KPI, show Q4 total/avg (as appropriate), Q1 total/avg, **absolute** and % **change**.
- 2. Visualize:
 - Clustered bar comparing Q4 vs Q1 for: Sales, Marketing Spend, New Customers, Returning Customers, Avg Rating, Conversion%, Refunds, NPS.
 - Scatter of Marketing_Spend_USD (x) vs Sales_Revenue_USD (y) for all 6
 months; fit a simple trendline and comment on spend-to-sales efficiency
 and any outliers.
- 3. Identify 3 drivers of change, citing numbers.
- 4. Provide seasonality commentary (holiday Q4 vs post-holiday Q1).
 Output:
- Differences table (neat)
- 2 charts with captions
- 3 bulleted drivers + 2-3 sentence narrative



Task 4 — File-to-file diff (Intermediate, 7 min)

Inputs: Customer_Accounts_v1.xlsx, Customer_Accounts_v2.xlsx

Deliverable: Diff report (adds/updates/deletes) + one table.

Model Prompt

I uploaded two Excel files (v1 and v2) with sheet "Accounts". Columns: CustomerID, Name, Tier, Status, Country, MRR_USD, Onboard_Date.

- 1. Create a diff report by CustomerID:
- New rows in v2,
- Deleted rows vs v1,
- Changed fields (show old → new for Tier, Status, Country, MRR).
- Summarize impact: total MRR_USD change, count of upgrades/downgrades, new vs churned customers.
- 3. Output a **compact table** with one row per changed CustomerID listing changed columns and values old→new.
- 4. End with 2 insights (e.g., "Upgrades concentrated in SG," "One churn drove -\$X MRR").



Task 5 — Generate insights + meeting agenda (Advanced, 7 min)

Deliverable: 3–5 "exec-grade" insights + a 30-min meeting agenda.

Model Prompt

Based on our Q4/Q1 comparison and churn analysis, write 3-5 insights using: Pattern \rightarrow Evidence \rightarrow Implication \rightarrow Recommendation.

Then draft a tight 30-minute meeting agenda for a QBR with CEO/CFO/COO:

- Objectives (2 bullets)
- Agenda (5 items with time boxes)
- Requested decisions (3 bullets)
- Pre-reads (link the CSVs + churn image)
- Attendees

Keep language crisp, exec-friendly, action-oriented.



Task 6 — Word ▶ PowerPoint from outline (Advanced, 6 min)

Input: QBR_Outline.txt (copy into Word)

Deliverable: Draft deck (titles + bullets) you can refine.

Model Prompt (for Copilot or ChatGPT)

Convert this QBR outline into a PowerPoint draft:

- 1 slide per numbered section
- Each slide: title + 3 concise bullets
- Add a final "Actions & Owners" slide (table: Action | Owner | Due Date)
- Keep tone professional and data-driven
- Include placeholders like "[insert chart: Sales by Month]" where visuals from earlier tasks can be embedded

(Stretch: ask for "speaker notes" under each slide.)



Bonus NLQ (Natural-Language Query) Ideas (use anytime)

- "Which month had the best conversion and what was its marketing spend?"
- "Compute and rank the Sales/Spend efficiency by month."
- "Show a **correlation matrix** across Sales, Marketing, Sessions, Conversion%, Refunds, NPS (with a heatmap)."
- "Create a one-page narrative: Sales grew X% in Q4 due to ..., while Q1 dipped Y% due to ... Include 2 charts."

What "Great" Looks Like (rubric for teams)

- Accuracy: Numbers reconcile; MoM/QoQ math is correct.
- Clarity: Clean tables, labeled charts, short narrative.
- Insight: You explain why, not just what.
- Action: Clear next steps and owners.
- Polish: Draft deck + agenda ready to send.