AI Innovation Builder Assignment

Candidate Assessment

Challenge: Quarterly Business Review (QBR) Auto-Drafter

Goal

Build an **AI-powered prototype** that automatically generates a **Quarterly Business Review (QBR)** summary for a customer, using both structured and unstructured account data.

This exercise simulates how monday.com's **Customer Success Managers (CSMs)** could save time and deliver consistent, insight-driven reports through AI-assisted workflows.

Scenario

CSMs currently prepare QBRs manually, combining information from multiple sources:

- CRM notes (free text)

- Support ticket trends

- Product usage metrics (automation adoption, active seats, login frequency)

- Customer feedback or NPS results

The process typically takes **5+ hours per account**, leading to inconsistent storytelling and missed insights.

Your task: **design and build an AI-driven workflow** that automatically drafts a **data-driven QBR summary** (or slide outline) for each account.

What You'll Get

A sample dataset containing 3–5 simulated customer accounts, including:

Field	Description
account_name	Customer name
plan_type	Subscription type
active_users	Number of active users
usage_growth_qoq	% change in usage quarter-over-quarter
automation_adoption_pct	Automation feature adoption rate
tickets_last_quarter	Support ticket count
avg_response_time	Average support response time
nps_scorz	Most recent NPS score
preferred_channel	Main communication preference (Email / Phone / Chat / In-app chat).
scat_score	Success Confidence & Adoption Trend (SCAT) - internal health metric (0–100).
risk_engine_score	AI-predicted churn risk (0–1). Higher = greater likelihood of churn.
crm_notes	Qualitative notes from the CSM
feedback_summary	Key feedback or feature requests

Your Mission

Design and deliver a **prototype** that:

1. **Summarizes** each account's quarter - what went well, what didn't.

2. **Quantifies** business impact - usage, adoption, satisfaction.

3. **Recommends** next-step actions grounded in data.

4. **Generates** a ready-to-use **QBR summary** (Markdown, text, or slide outline).

Feel free to add more insights for the prototype.

Deliverables

#	Deliverable	Description
1. Design Brief (1–2 pages)	Overview explaining how you framed the problem, who the user is (CSM, team lead), and what success looks like. Include assumptions, limitations, prioritization and how you'd validate usefulness.	Clear framing, empathy for end-users, realistic success metrics.
2. Flow Architecture Diagram	Visual or schematic showing how data flows from source → processing → AI reasoning → output. You can use draw.io, Miro, markdown ASCII, or a simple table.	System thinking, modularity, clarity. Do you consider data prep, grounding, prompt stages, and validation?

3. Prototype / PoC	Working demo that generates QBR drafts from the dataset. Doesn't need to be fully polished - just functional and illustrative. Including 2–3 generated QBR summaries. Please share a demo that business owners can play with the demo.	Creativity, effective integration of structured + unstructured data, correctness of summaries. Insightfulness, clarity, and business relevance of recommendations.
4. Prompts & Components Documentation	Showing key prompts for insight extraction, summarization, and recommendations. Include how you handled hallucinations and structured outputs (schemas, temperature, format).	Depth of prompt reasoning, grounding to data, awareness of model limits.
6. Experiment & Reflection	One-pager explaining how you'd measure or improve this solution. What worked? What didn't? What's next (e.g., adding visuals, connecting to monday boards)?	Analytical thinking, iteration mindset, and understanding of evaluation metrics.

Guidelines

- You may use any AI model (OpenAI, Anthropic, etc.).

- Any environment is fine: Python, Node.js, n8n, Make, or a no-code tool.

- Focus on clarity and reasoning over polish - a strong prototype beats a fancy UI.

- Clearly label your assumptions and cite where outputs rely on simulated data.