AI Agents for Finance - User Journey: Headcount Analysis

	Identification	Gathering	Consolidation	Analysis	Storytelling
Problem	I need to do a headcount analysis by department to understand trends and identify opportunities	I need to gather data for this analysis and don't know where to find it	I need to consolidate the 5 different files you received (all in different format)	I need to start your analysis and don't know where to start	I need to present your findings to the CFO and CPO
Current Ways of Working	Excel	Ask your colleagues in HR	Receive Excel files and one PDF with some of the data you need	Excel	Use PowerPoint and Storytelling
User Experience	🙂 curious, excited (Positive)	🙁 interested, hesitant	😡 frustrated (Negative)	🤔 expectant, anxious	😍 satisfied, happy
Pain Points	Want to know what are best practices for this type of analysis and what are the key outcomes from it	Want a single source of truth (SST) for data where I can get everything I need in one place	Data is in different files in not a standardized way and it takes too much time to consolidate	Too many columns that I don't need, too many options, don't know where to start	Little time to do this and don't know exactly what to present
Solutions	Collection of Best Practices for this Analysis (data needed, analysis flow, outputs, outcomes)	SST with all the data I'd need	Data in the same format in a quick and easy way 🤖	Template with the Analysis Flow to help me get started that I can customise 🤖	Template to present to different stakeholders with advices

🤖 Where this AI Agent can help

BY CHRISTIAN MARTINEZ

AI Agents for Finance - User Journey: Template

	Step	Step	Step	Step	Step
Problem					
Current Ways of Working					
User Experience	Positive / Negative				
Pain Points					
Solutions					

BY CHRISTIAN MARTINEZ