**Agentic Process Automation #4 (APA4 – Research Company)**

**Research Company – Non-Microsoft Environment**

**Purpose**

Automate executive-level company research for sales, marketing, or strategic analysis using low-code/no-code tools, ChatGPT, and readily available public APIs outside the Microsoft stack.

**Step-by-Step Process Flow**

**1. Trigger**

* **Manual:** User enters company name in google sheet, which will trigger the APA.

**2. Extract Request Details**

* Make scenario extracts company name.

**3. Retrieve Prompting Supplement**

* Make retrieves a “prompting supplement” document from Google Drive that defines the structure, style, and required research sections for ChatGPT (e.g., revenue, growth, ERP system, business segments, treasury pain points, etc.).

**4. AI Company Research via ChatGPT**

* Make sends the company name and the prompting supplement to ChatGPT.
* **Prompt:** “Research [Company Name] and draft a structured executive summary according to the sections below…”
  + *Sections typically include*:
    - Overview (50 words)
    - Revenue, profitability, and growth (last 2–3 years)
    - Key products/services
    - Lines of business
    - Countries of operation
    - Currencies used
    - Banking relationships
    - Treasury operations (centers, cash management, tech stack)
    - Primary ERP system
    - Corporate structure/affiliates
    - Key sales insights (50-word summary of treasury/finance pain points/opportunities)
    - Include a link to and summary of the 5 most recent articles mentioning the company regarding changes in organizational structure, M&A activity, technological stack changes, or critical Financial information.

**6. Visuals/Logos**

* Use an OpenGraph or scraping module to retrieve company logo or relevant images, if needed for presentation.

**7. Report Generation**

* Use cheaper AI model to ensure consistent formatting of the output report
* Make compiles the AI-generated executive summary into a formatted Google Doc (or Google Sheet row).
* Document is titled “[Company Name] Executive Summary – YYMMDD”.
* **Cloud Storage:** Saved in a “Company Research” folder on Google Drive.

**8. Logging & Tracking**

* Key summary data (company name, Doc URL, date, process trigger flag, process status, tracking number – unique identifer) logged to a master Google Sheet for history reporting/search.
* Sequential tracking number assigned.

**9. Delivery**

* Create email with google doc attachment and deliver to defined list of email accounts.
* PDF or Doc link sent to requester via Gmail (with option to share with others).

**10. Archiving & Feedback**

* All research docs archived in Google Drive.
* Optional feedback link for user to submit corrections or additional research requests.

**Key Data Fields (Google Sheet)**

* Request Date / Research Date
* Company Name
* Sequential Research ID
* Revenue (latest available)
* Growth Rate / Profitability
* ERP System
* Country(ies) of Operation
* Business Segments
* Treasury Ops Notes
* Doc Link
* Requester / Editor
* Status (Complete/Pending)
* (Optional) Company Logo/Image URL

**Optional/Future Enhancements**

* Add Salesforce or Salesloft integration for client/contact matching
* Option to trigger process from MS Teams or other chatbot
* Automated archiving in additional formats (PDF, HTML)

**Research Company – Microsoft Environment**

**Purpose**

Automate, enrich, and document company research for sales/strategy using Microsoft-native tools (Power Automate, Teams, SharePoint, Copilot Studio), integrating proprietary/internal systems (Salesforce, Salesloft, ZoomInfo) alongside AI-generated insights.

**Step-by-Step Process Flow**

**1. Trigger**

* **Teams:** User enters request via Teams message (“Research Company: [Company Name]”)
* **Alternate:** Outlook email, Power App form, or SharePoint form

**2. Extract Request Details**

* Power Automate parses input for company name and any additional parameters.

**3. Retrieve Prompting Supplement**

* Power Automate retrieves a “prompting supplement” doc from SharePoint (defines structure, tone, and target insights for Copilot/ChatGPT).

**4. AI Company Research via Copilot/ChatGPT**

* Power Automate (or Copilot Studio agent) sends the company name and supplement prompt to ChatGPT (via OpenAI connector) or to Copilot Studio for LLM-based generation.
* **Prompt:** Same structured executive summary as above, but can be enriched for enterprise use, including compliance language or additional context.

**5. Proprietary Data Enrichment**

* Power Automate queries Salesforce/Salesloft for:
  + Existing accounts/contacts
  + Most recent engagement
  + Account owner
  + Open/closed opportunities
* Optionally, query ZoomInfo for technology stack, company size, leadership contacts, etc.

**6. Visuals/Branding**

* Power Automate fetches company logo or primary image (using OpenGraph, Bing Image Search, or internal asset bank).

**7. Report Generation**

* Compile all AI and proprietary data into a formatted Word document (using Office Scripts or Word API).
* Title: “[Company Name] Executive Summary – YYMMDD”
* Save to SharePoint “Company Research” library.

**8. Google/Excel Sheet Logging**

* Log summary data to a SharePoint List or Excel Online sheet:
  + Company name
  + Revenue, growth, profitability
  + ERP system
  + Business segments, countries
  + Salesforce engagement/contact owner
  + Doc link
  + Editor/Requester
  + Status

**9. Delivery**

* Notify user via Teams (message with Doc link), Outlook email, or assign as a task in Planner/To Do.
* Optionally, post to internal Teams channel for visibility.

**10. Analytics & Feedback**

* Log usage and feedback in SharePoint/Excel (who requested, when, engagement).
* Optionally, add feedback button (Power Apps) for corrections, enhancements.

**11. Archiving**

* All research docs archived in SharePoint with versioning for audit/compliance.
* Optional backup to OneDrive.

**Key Data Fields (SharePoint List/Excel)**

* Research Date
* Company Name
* Research ID
* Revenue, Growth, Profitability
* ERP System
* Countries / Segments
* Key Contacts (from Salesforce/Salesloft)
* Tech Stack (from ZoomInfo)
* Status
* Editor/Requester
* Link to Doc (Word/SharePoint)
* Teams/Planner Link (if assigned)
* Feedback (if submitted)

**Optional/Future Enhancements**

* Power Automate approval workflow for QC before delivery
* Scheduled re-research/reminders
* Integration with Microsoft Syntex for document tagging/classification
* Automated translation/localization for global teams

**Comparative Notes**

* **Non-Microsoft:** Fastest to implement, leverages Make/Zapier, Google tools, and direct AI, best for proof-of-concept, smaller teams, or pre-enterprise use.
* **Microsoft:** Scalable, secure, integrates internal data (Salesforce, ZoomInfo), leverages SharePoint/Teams for access control and compliance, better for mature/regulated orgs.