AI for Business Workflows

A Hands-On Guide to Smarter, Faster, Automated Insights

(Powered by Microsoft Copilot)

These are exploratory concepts inspired by the capabilities of current AI tools and a genuine curiosity about their potential. The hope is that more professionals recognize their impact and begin experimenting with them in their own workflows.

September, 2025

Entellopy

Table of Content

Why Data Analytics Needs a Reboot

Data Analytics is no longer just about dashboards, spreadsheets, and delayed reports. In today's fast-moving environment, businesses need insights that are not only accurate, but predictive, and actionable. That's where AI Agents come in.

AI Agents are transforming how we work with data. They assist, automate, anticipate, and adapt. From summarizing complex datasets to generating forecasts and visualizations, these tools are reshaping the role of the analyst into that of a strategic.

This ebook is a practical walkthrough for professionals who want to evolve their analytics workflows using free, accessible AI tools.

Whether you're in marketing, finance, operations, or retail, you'll learn how to:

- Automate repetitive tasks like reporting and summarization
- Use AI to uncover trends and generate insights in real time
- Build lightweight, intelligent workflows without writing code

We'll explore real-world scenarios, step-by-step guides, and toolkits that help you move from reactive analysis to proactive decision-making. With actionable strategies to reinvent your analytics practice today.

The Data Analytics Maturity Map

Imagine walking into a meeting with a spreadsheet and a dashboard. You've spent hours wrangling data, formatting charts, and hoping someone sees the insight buried in cell G27. That's Level 1 of Data Analytics maturity and it's where many professionals still live. But it does not have to be this way.

AI solutions are evolving fast, but not everyone is moving at the same pace, especially in the Data Analytics field. To reinvent your analytics workflow with AI, you first need to understand where you stand.

This chapter introduces the **DA Maturity Map**, a simple framework to help you understand where you are in your analytics journey and how AI Agents can help you leap forward.

The Four Levels of Analytics Maturity

This framework helps you assess your current analytics capabilities and identify the next step toward AI-augmented workflows.

Level 1: Manual Analytics

"I spend more time formatting than analyzing."
- You rely on spreadsheets, manual data entry, and static reports.
- Insights are delayed, and decision-making is reactive.
- You're the bottleneck, everything flows through you.

Typical Tools: Excel, Google Sheets
Pain Points: Time-consuming, error-prone, siloed
Example: You download sales data every Monday, clean it manually, and email a report by Wednesday. By then, the numbers are already outdated.

Level 2: Assisted Analytics

"I've got dashboards, but they don't tell me what's important."
- You use BI tools to visualize data and automate some reporting.
- You've built templates and formulas to speed things up.
- But you still interpret everything manually and insights are surface-level.

Typical Tools: Power BI, Tableau, Looker
Pain Points: Limited depth, slow iteration, passive insights
Example: Your dashboard shows a dip in revenue, but you still need to dig through filters and tabs to figure out why.

Level 3: Augmented Analytics

"I ask AI what's happening and it tells me."
- You use AI tools to summarize, explore, and visualize data.
- You can ask questions in plain language and get meaningful answers.
- You spend less time crunching and more time strategizing.

Typical Tools: ChatGPT (Advanced Data Analysis), Notion AI, Perplexity AI, Google Sheets + GPT
Superpowers: Fast insights, natural language queries, automated summaries

Example: You upload a CSV file into ChatGPT and ask, "Which region had the highest growth last quarter?" It gives you the answer, a chart, and a summary, all in seconds.

Level 4: Autonomous Analytics
"My AI agent sends me insights before I even ask."
- AI agents monitor data, detect patterns, and trigger alerts or reports automatically.
- You've built workflows that run in the background—no manual effort required.
- You're not just analyzing data—you're orchestrating intelligence.

Typical Tools: Harpa AI, Zapier + GPT, custom agent workflows
Superpowers: Real-time action, proactive insights, scalable automation
Example: Your AI agent checks your sales dashboard daily, detects a drop in conversion rate, and sends you a Slack message with a suggested action plan.

Self-Assessment: Where Do You Stand?
Here's a quick checklist to help you identify your current level:

- Do you manually clean and copy data between tools?
- Are your reports mostly descriptive (what happened)?
- Do you wait for someone else to interpret the data?
- Have you used AI to summarize, visualize, or forecast data?

If you answered "yes" to the first three and "no" to the last one, you're likely at Level 1 or 2. That's perfectly fine.

This ebook is designed to help you move into Level 3 and experiment with Level 4.

Understanding your maturity level helps you:

- Choose the right tools for your current workflow
- Set realistic goals for automation and augmentation
- Avoid overwhelm by building step-by-step
- Track your progress as you evolve

Think of it as upgrading your analytics mindset, from reactive to proactive, from manual to intelligent.

In the next chapter, we'll build your **AI Toolkit**. A curated set of free tools that will help you move from assisted to augmented analytics. You'll learn how to automate tasks, generate insights, and start building your own AI-powered workflows.

…

Setting Up Your AI Toolkit

You don't need a PhD or a corporate budget to reinvent your analytics workflow. What you need is a lean toolkit of AI-powered tools that work together to automate tasks, generate insights, and save hours of manual effort.

This chapter introduces a curated set of **free or freemium tools** that help you move from assisted to augmented analytics tools that

speak your language, understand your data, and deliver results fast.

Here are the essential tools we'll use throughout this ebook:

1. ChatGPT (Advanced Data Analysis)
- **What it does**: Upload spreadsheets, ask questions, get summaries, charts, and forecasts.
- **Use cases**: Sales trend analysis, anomaly detection, executive summaries.
- **Impact**: It's like having a data scientist on call.

2. Notion AI
- **What it does**: Summarizes notes, generates reports, creates to-do lists from raw data.
- **Use cases**: Meeting notes, project tracking, customer feedback analysis.
- **Impact**: Turns messy thoughts into structured insights.

3. Google Sheets + GPT Add-ons
- **What it does**: Use AI formulas to clean data, generate summaries, and automate calculations.
- **Use cases**: Budget analysis, campaign performance, survey results.
- **Impact** Brings AI directly into your spreadsheet workflow.

4. Perplexity AI
- **What it does**: Research assistant that summarizes sources and answers complex questions with citations.
- **Use cases**: Competitive analysis, market research, trend exploration.
- **Impact** Cuts research time in half.

5. Harpa AI (Browser Automation)
- **What it does**: Automates web tasks like scraping data, summarizing pages, and triggering alerts.
- **Use cases**: Monitoring dashboards, tracking KPIs, automating reports.
- **Impact:** Adds automation to your browser without code.

Other Tools
- **Canva Magic Write**: Generate visuals and reports with AI-powered writing.
- **Zapier + GPT**: Build automated workflows that connect your tools and trigger actions.
- **Fathom**: Record and summarize meetings with AI-generated action items.

Set Up
Each tool takes less than 10 minutes to activate. Here's a quick setup guide:

ChatGPT → Sign up at chat.openai.com, enable GPT-4 with Advanced DA

Notion AI → Create a free Notion account, activate AI features in settings

Google Sheets + GPT → Install GPT add-ons from Google Workspace Marketplace

Perplexity AI → Visit perplexity.ai, no login required

Harpa AI → Install the browser extension from harpa.ai

In the next chapter, we'll dive into your first **hands-on walkthrough**. A step-by-step guide to turning raw data into insights, charts, and decisions in minutes.

···

Use Case 1: Automating Sales Trend Analysis with ChatGPT

Imagine you're handed a spreadsheet with quarterly sales data across multiple regions. The task: Spot trends, visualize performance, and summarize key insights for a meeting that starts in 20 minutes.

In the past, this meant pivot tables, charts, and frantic formatting. Today, it means uploading the file to ChatGPT and letting AI do the heavy lifting.

Scenario Setup
Dataset: Quarterly sales by region
Goal: Identify growth trends, generate a chart, and summarize performance
Tool: ChatGPT with Advanced Data Analysis

Step-by-Step Guide
Step 1: Prepare Your Data
Create a spreadsheet

Save it as .csv or .xlsx.

Quarter,North,South,East,West
Q1,120,90,75,60
Q2,130,95,80,70
Q3,140,100,85,75
Q4,150,110,90,80

Step 2: Upload to ChatGPT
- Go to chat.openai.com
- Make sure GPT-4 with Advanced Data Analysis is enabled
- Click the ✎ icon to upload your file

Step 3: Ask Your Prompt
Type something like:
"Analyze this data and show which region had the highest growth. Create a chart and write a summary."

ChatGPT will:
Calculate growth rates → Identify top-performing regions → Generate a line or bar chart → Write a plain-English summary

Step 4: Review the Output
A chart showing regional performance over time
A summary like:
"*The North region showed the highest growth at 25%, followed by South (22.2%), East (20%), and West (33.3%). North maintained the highest absolute sales figures throughout the year.*"

Outcome

In under 5 minutes, you've automated:
A trend analysis, generated a clean visualization, and wrote a meeting-ready summary.

No formulas. No formatting. Just insight.

…

Use Case 2: Customer Segmentation with Notion AI

Customer segmentation used to require hours of spreadsheet wrangling, manual tagging, and endless filtering. But with AI tools like Notion AI, you can now generate meaningful customer profiles, behavioral clusters, and actionable insights in minutes—without writing a single line of code.

This chapter walks you through how to use Notion AI to analyze customer feedback, identify segments, and build personas that actually drive decisions.

Scenario Setup

Dataset: Raw customer feedback and purchase behavior
Goal: Identify customer segments and generate personas
Tool: Notion AI

Step-by-Step Guide
Step 1: Gather Your Data
Start with a simple table or list in Notion. Example:

Customer Feedback:
- "I love the eco-friendly packaging and fast delivery."
- "The product quality is great, but I wish there were more color options."
- "I'm a repeat buyer—please offer loyalty discounts."
- "Shipping took too long. I won't order again."
- "I like the minimalist design and easy checkout process."

You can also include purchase history, location, or frequency if available.

Step 2: Ask Notion AI to Summarize
Highlight the feedback block and prompt:
"Summarize the key themes and group customers by behavior or preference."
Notion AI will:
- Identify recurring themes (e.g., eco-conscious, design-focused, price-sensitive)
- Suggest clusters like "Loyal Buyers," "Style Seekers," "Frustrated Shoppers"

Step 3: Generate Personas
Prompt:
"Create customer personas based on these segments.
Include name, traits, and buying motivation."

Example output:
- **Eco Emma**: Values sustainability and fast shipping. Likely to promote a brand via word-of-mouth.

- **Design Dave**: Prioritizes aesthetics and ease of use. Responds well to curated product drops.
- **Loyal Lucy**: Repeat buyer who wants recognition and perks. Ideal for loyalty programs.
- **Frustrated Frank**: Had a poor experience. Needs re-engagement or win-back strategy.

Step 4: Turn Insights into Action

Ask Notion AI:

"Suggest marketing strategies for each persona."

You'll get ideas like:
- Eco Emma → Highlight green initiatives in email campaigns
- Loyal Lucy → Offer exclusive discounts and early access
- Frustrated Frank → Send apology email with incentive to return

Outcome

This case have shown how you can
- Segmented your customers
- Created actionable personas
- Designed targeted strategies

No surveys. No clustering algorithms. Just smart AI prompts.

…

Use Case 3: Forecasting with Google Sheets + GPT

Forecasting used to be reserved for data scientists with Python scripts and statistical models. But now, with AI-powered formulas inside Google Sheets, anyone can build predictive models, spot trends, and automate insights right from the spreadsheet.

This chapter walks you through how to use GPT-powered add-ons in Google Sheets to forecast future performance based on historical data.

Scenario Setup

Dataset: Monthly revenue data
Goal: Forecast next 3 months of revenue
Tool: Google Sheets + GPT Add-on (e.g., SheetAI, GPT Workspace)

Step-by-Step Guide

Step 1: Prepare Your Data

Create a simple table in Google Sheets:

Month	Revenue ($)
Jan	12,000
Feb	13,500
Mar	14,200
Apr	15,000
May	15,800
Jun	16,500

Step 2: Install GPT Add-on
- Go to **Extensions > Add-ons > Get add-ons**
- Search for **SheetAI**, **GPT Workspace**, or similar

- Install and authorize access

Step 3: Use AI Formula to Forecast
In a new cell, type a formula like:
=GPT("Forecast next 3 months based on the revenue trend")

Or use a prompt cell:
=GPT(A1:A6, "Predict revenue for July, August, and September")

The AI will:
- Analyze the trend
- Apply a linear or exponential model
- Return forecasted values

Step 4: Visualize the Forecast
Use Google Sheets' built-in chart tools:
- Select your original and forecasted data
- Insert a line chart
- Label future months clearly

Outcome
- Forecasted future performance
- Automated trend analysis
- Created a visual report

No formulas. No regression models. Just smart AI prompts.

···

Use Case 4: Automating Research with Perplexity AI

Research is the backbone of strategic decision-making, but it's also one of the most time-consuming tasks in analytics. Whether you're exploring market trends, competitor moves, or customer behavior, digging through articles, reports, and data can eat up hours.

Enter **Perplexity AI**, a conversational search engine that doesn't just find information, it summarizes it, cites it, and helps you think through it.

In this chapter, you'll learn how to use Perplexity to automate research and turn raw information into actionable insights.

Scenario Setup
Goal: Research emerging trends in online retail
Tool: Perplexity AI
Use Case: Summarize sources, compare competitors, generate strategic recommendations

Step-by-Step Guide
Step 1: Ask a Strategic Question
Go to perplexity.ai and type:
"What are the top emerging trends in online retail for 2025?"
Perplexity will:
- Search across trusted sources
- Summarize key trends (e.g., AI personalization, live shopping, sustainable logistics)
- Provide citations so you can verify or dive deeper

Step 2: Refine Your Focus
Follow up with:
"Compare how Amazon and Shopify are responding to these trends."
You'll get:
- A side-by-side summary of strategies
- Insights into product innovation, logistics, and customer experience
- Links to source articles and reports

Step 3: Generate Strategic Insights
Ask:
"What opportunities do these trends create for mid-size fashion retailers?"
Perplexity will suggest:
- Personalized shopping experiences using AI
- Sustainable packaging as a brand differentiator
- Influencer-led live commerce strategies

Step 4: Turn Research into Action
Copy the summary into Notion or Google Docs and prompt ChatGPT:
"Turn this research into a 3-point strategy plan for a fashion retailer."

You'll get a clean, actionable framework ready for presentation or execution.
Outcome
- Researched a complex topic
- Compared competitors
- Generated strategic recommendations

No endless tabs. No PDF skimming. Just focused, AI-powered insight.

…

Use Case 5: Automating Reporting with Harpa AI

Reporting is one of the most repetitive tasks in analytics. You check dashboards, copy numbers, paste them into slides, write summaries and repeat it all next week. But what if an AI agent could do that for you?

Harpa AI is a browser-based automation tool that acts like a personal assistant for your data. It can monitor websites, extract metrics, summarize pages, and even trigger alerts or emails—all without writing code.
This chapter shows you how to use Harpa AI to automate reporting workflows and free up hours of manual effort.

Scenario Setup
Goal: Monitor a sales dashboard and generate weekly performance summaries
Tool: Harpa AI
Use Case: Automate reporting, extract KPIs, summarize insights

Step-by-Step Guide
Step 1: Install Harpa AI
- Visit harpa.ai

- Install the Chrome extension
- Pin it to your browser toolbar

Step 2: Open Your Dashboard
Navigate to your BI dashboard (e.g., Power BI, Tableau, Google Data Studio). Make sure key metrics like revenue, conversion rate, and top products are visible.

Step 3: Create a Harpa Command
Click the Harpa icon and create a new command:
"Summarize this dashboard. Extract revenue, conversion rate, and top 3 products. Write a weekly performance summary."

Harpa will:
- Scan the page
- Extract visible metrics
- Generate a summary in natural language

Step 4: Schedule the Report
Set Harpa to run this command every Friday at 4 PM. You can:
- Save the summary to Notion or Google Docs
- Email it to your team
- Trigger a Slack message

You can also
- Monitor competitor websites for price changes
- Track blog traffic or SEO metrics
- Summarize news articles or press releases

Outcome
- Automated your weekly reporting
- Eliminated manual copy-paste
- Created a repeatable, scalable workflow

No scripts. No integrations. Just browser-based AI magic.

...

Building Your Own AI Agent Workflow

By now, you've seen how individual AI tools can automate tasks, generate insights, and save hours of manual work. But the real magic happens when you connect them, creating a **workflow** where AI agents collaborate across platforms to deliver insights, trigger actions, and keep your analytics engine running in the background.

This chapter shows you how to design and build your own AI-powered workflow using the tools from this ebook.

What Is an AI Agent Workflow?
An AI agent workflow is a system where multiple tools work together to:
- Monitor data
- Generate insights
- Summarize findings
- Trigger alerts or actions

Think of it as a virtual analyst team that never sleeps.

Example Workflow: Weekly Sales Intelligence Loop
Goal: Automate weekly sales reporting, trend analysis, and strategy updates

Step 1: Harpa AI - Scrape metrics from your sales dashboard every Friday.
Step 2: ChatGPT - Summarize performance, identifies trends, and generates a chart
Step 3: Notion AI - Log the summary and creates action items
Step 4: Google Sheets + GPT - Forecast next week's sales and updates the dashboard
Step 5: Zapier (optional) - Send Slack or email alerts to your team

How to Build It
Step 1: Define Your Trigger
What event starts the workflow? (e.g., Friday at 4 PM, new data upload, KPI threshold)

Step 2: Choose Tools
- Harpa AI for monitoring
- ChatGPT for analysis
- Notion AI for documentation
- Google Sheets for forecasting
- Zapier for notifications

Step 3: Map the Flow
Use a simple diagram or checklist: Harpa scrapes → ChatGPT analyzes → Notion logs → Sheets forecasts → Zapier alerts

Step 4: Test and Adjust
Run the workflow manually once. Refine prompts, adjust timing, and make sure each tool hands off cleanly to the next.

Tips
- Use clear, repeatable prompts (save them in Notion)
- Keep workflows modular—easy to swap tools or steps
- Start small, then scale (e.g., one report → full dashboard automation)

Outcome
This system:
- Runs your analytics automatically
- Delivers insights without manual effort
- Frees you to focus on strategy, not spreadsheets

We've just reinvented your Data Analytics practice, from manual dashboards to intelligent, AI-powered workflows. Whether you're a solo analyst or part of a team, these tools and techniques will help you stay ahead, move faster, and think smarter.

...

From Analyst to Strategic Analyst

You began this journey surrounded by spreadsheets and dashboards. Now, you've stepped into a new role, one where AI agents help you analyze, summarize, forecast, and act on data with speed and precision.

This transformation isn't just about saving time. It's about shifting your mindset. You've learned how to automate repetitive tasks, generate insights in minutes, and build intelligent workflows that run quietly in the background. You've moved from reactive reporting to proactive strategy, from manual effort to intelligent execution.

You don't need to become a data scientist to thrive in this new landscape. You simply need to think like a strategic analyst. Someone who knows how to ask the right questions, use the right tools, and let AI handle the heavy lifting.

The selected tools are free, the proposed workflows are simple and the results can have a real impact in your job.

So go ahead. Build your first AI-powered system. Share smarter insights. Experiment boldly. Let your data work for you.

Analytics is evolving and now, you're ready to lead the way.