PM Report Automation – Prompt Templates & Workstream Spec

Overview

Three-phase pipeline: **Gather → Structure → Verify & Format**

Phase 1: Data Gathering Prompts

1A. Slack Context Extraction

```
You are extracting project context from Slack messages for engagement: {ENGAGEMENT_NAME}.
Search Slack channel: {CHANNEL_NAME} for messages from the last {TIMEFRAME} days.

Extract and return as JSON:
{
  "decisions_made": [],
  "blockers_raised": [],
  "escalations": [],
  "key_updates": [],
  "action_items": [],
  "customer_sentiment_signals": []
}

Rules:
- Only extract facts, not opinions
- Flag any item that mentions a number, date, or dollar value as "requires_verification": true
- Include message timestamp and author for each item
```

1B. Gmail / Meeting Notes Extraction

```
You are extracting structured project updates from emails and meeting notes for: {ENGAGEMENT_NAME}.
Search Gmail for emails to/from {CUSTOMER_DOMAIN} in the last {TIMEFRAME} days.

Extract and return as JSON:
{
  "accomplishments_this_week": [],
  "commitments_made_to_customer": [],
  "risks_and_watch_points": [],
  "open_questions": [],
  "next_steps_agreed": []
}

Rules:
```

- Do NOT infer or estimate numbers – mark any number as "source": "email" and flag for Salesforce verification
- Prefer the most recent email if information conflicts

1C. Google Drive / Sheets Context

```
You are reading project tracking data for: {ENGAGEMENT_NAME}.
Access Google Drive folder: {FOLDER_LINK_OR_ID}

Look for: project plan, tracker spreadsheet, milestone log, risk register.

Extract and return as JSON:
{
  "milestones": [{"name": "", "due_date": "", "status": "", "owner": ""}],
  "current_week_tasks": [{"task": "", "status": "", "owner": ""}],
  "next_week_tasks": [{"task": "", "status": "", "owner": ""}],
  "risks": [{"description": "", "severity": "High|Medium|Low", "mitigation": ""}]
}

Rules:
- If no structured tracker exists, return empty arrays and set "tracker_found": false
- Do not guess task status
```

1D. Salesforce Data Pull (Source of Truth for Numbers)

```
You are fetching verified financial and consumption data from Salesforce for: {ENGAGEMENT_NAME}.

Query Salesforce for opportunity: {SF_OPPORTUNITY_ID}

Return as JSON:
{
  "contracted_hours": null,
  "hours_consumed": null,
  "hours_remaining": null,
  "contract_value_aud": null,
  "consumption_percentage": null,
  "projected_completion_date": null,
  "opportunity_stage": null
}

Rules:
- Return null for any field not found – do NOT estimate
- This block is the ONLY authoritative source for all numbers in the final report
- Flag if hours_remaining < 20% of contracted_hours as "at_risk": true
```

1E. Glean Search (Supplementary)

```
Search Glean for any recent documents, tickets, or pages related to: {ENGAGEMENT_NAME} OR
{CUSTOMER_NAME}
Timeframe: last {TIMEFRAME} days

Return a list of relevant results with:
- title
- source (Confluence, JIRA, ADO, etc.)
- summary (2-3 sentences max)
- url

Exclude: generic company-wide docs, HR/admin content, results with confidence < 0.7
```

Phase 2: Report Structuring Prompt

Master Report Assembly

```
You are a Databricks Professional Services PM generating a weekly status report.

INPUT: The following JSON blocks have been gathered for engagement: {ENGAGEMENT_NAME}, Customer:
{CUSTOMER_NAME}
- Slack context: {SLACK_JSON}
- Email/meeting context: {EMAIL_JSON}
- Tracker data: {TRACKER_JSON}
- Salesforce data: {SALESFORCE_JSON} ← THIS IS THE ONLY SOURCE FOR ALL NUMBERS

Generate a structured status report following this exact template:


---
## Weekly Status Report – {CUSTOMER_NAME}
**Week ending:** {DATE}
**PM:** {PM_NAME}
**Engagement:** {ENGAGEMENT_NAME}

### Project Milestones
[List from tracker data. Mark each as On Track / At Risk / Delayed]

### This Week's Accomplishments
[3-5 bullet points. Factual, past tense.]

### Next Week's Plan
[3-5 bullet points. Specific and actionable.]
```

```
### Watch Points / Risks
[List risks with severity. Include mitigation where known.]

### Consumption Summary
- **Hours contracted:** {FROM SALESFORCE ONLY}
- **Hours consumed:** {FROM SALESFORCE ONLY}
- **Hours remaining:** {FROM SALESFORCE ONLY}
- **% consumed:** {FROM SALESFORCE ONLY}
- **Forecast to complete:** {FROM SALESFORCE OR TRACKER}

### Points to Discuss with Customer
[2-3 items requiring customer decision or attention]

### Operational Items (Internal)
[Items for internal Databricks team only]
---

Rules:
- If a number is not in the Salesforce block, write "TBC – verify in Salesforce"
- Do NOT invent, estimate, or carry forward numbers from prior weeks
- Keep accomplishments and plans distinct – no overlap
- Flag the entire report with "REVIEW_REQUIRED: true" if any field contains "TBC"
```

Phase 3: Customer Email Draft Prompt

Covering Email Generator

```
You are drafting a professional weekly update email to the customer.

INPUT: The finalized status report above.
Customer contact: {CUSTOMER_NAME}, {CUSTOMER_ROLE}
Our PM: {PM_NAME}

Write a concise covering email (max 200 words body) that:
- Opens with 1-sentence summary of week
- Highlights 2-3 key accomplishments (from report)
- States 1-2 things needed from the customer (from "Points to Discuss")
- Closes with next touchpoint date

Subject line format: [DATABRICKS] {CUSTOMER_NAME} – Weekly Update – Week of {DATE}

Do NOT include consumption numbers in the email unless explicitly flagged as "include_financials": true
```

Workstream Architecture

```
INPUTS                TOOLS             OUTPUT
------            -----             ------
Slack channel       ────────▶ Phase 1A ──┐
Gmail / Meet notes  ────────▶ Phase 1B ──┤
G Drive / Sheets    ────────▶ Phase 1C ──┼──▶ Phase 2 (Assembly) ──▶ Draft Report
Salesforce          ────────▶ Phase 1D ──┤       ↑                │
Glean               ────────▶ Phase 1E ──┘   NUMBERS GATE          │
                          (1D must succeed)   Phase 3 (Email)
```

Numbers Gate rule: If Salesforce pull (1D) fails or returns nulls, halt and notify PM before proceeding to Phase 2. Never generate a report with estimated consumption figures.

Variables Requiring PM Input (per engagement)

Variable	Description
ENGAGEMENT_NAME	Internal Databricks engagement name
CUSTOMER_NAME	Customer organisation name
CUSTOMER_DOMAIN	Email domain for Gmail search
SF_OPPORTUNITY_ID	Salesforce opportunity ID
SLACK_CHANNEL	Primary Slack channel for this engagement
GDRIVE_FOLDER	Google Drive folder ID or URL
TIMEFRAME	Lookback window in days (default: 7)
PM_NAME	PM's full name
include_financials	Boolean – include $ in customer email

MVP Scope (Recommended First Build)

1. Manual input of engagement variables via simple form or config YAML
2. Phases 1A (Slack) + 1D (Salesforce) + Phase 2 (Assembly) only
3. Human review step before Phase 3 (email draft)

4. Google Sheets as output (not PDF) for easy PM editing

Phases 1B/1C/1E can be added iteratively once MVP is validated.