### ✅ Example 1: Earnings Data Agent – "Revenue & Margin Trend Extraction"

**Workflow:**

* **Trigger**: Banker types: *"What’s the trend in gross margin and top-line growth for ServiceNow over the past 4 quarters?"*
* **Data Source**: SEC filings (10-Qs), Earnings Press Releases
* **Agent Output**:  
    
    
   **Revenue Growth (YoY):** Q1’25: +20.6%, Q4’24: +18.9%, Q3’24: +21.2%, Q2’24: +19.4%  
   **Gross Margin Trend:** Q1’25: 81.1%, Q4’24: 80.7%, Q3’24: 81.5%, Q2’24: 80.9%  
   *"Sustained margin profile signals efficient scaling despite macro headwinds."*

**Why it works**: Shows multi-quarter aggregation, ratio derivation, and forward-looking narrative—all autonomously done by the data agent.

### ✅ Example 2: SEC + Dealogic Agent – "Tariff Exposure + M&A Activity Summary"

**Workflow:**

* **Trigger**: Banker types: *"Has ServiceNow cited tariff impacts or made recent acquisitions?"*
* **Data Source**: SEC Risk Factors (10-K), Dealogic M&A tracker
* **Agent Output**:  
    
    
   **Tariff Exposure**:  
    
    
   *"In its 2024 10-K, ServiceNow listed 'geopolitical shifts in tariff regimes' as a potential risk impacting global sales ops, especially in APAC."* **Recent M&A**:  
    
    
   *"Acquired 4me (NL-based ITSM platform) on Jan 2025 for $142M (EV/Sales 6.1x). Integration aimed at expanding mid-market European presence."*

**Why it works**: Combines structured and unstructured sources and contextualizes with insight relevant for meeting prep.

Let me know if you'd like these formatted into slide-friendly bullet points or user prompt/output UI mockups!

4o

##### You said:

Can you give a few more examples

###### ChatGPT said:

Absolutely—here are **four more examples** you can plug into the **Data Agent Workflow** to show versatility across data types (financials, market signals, strategic insights, etc.):

### ✅ Example 3: News + Analyst Commentary Agent – "Regulatory Impact Summary"

**Workflow**:

* **Trigger**: *"Has the company responded to any recent AI regulations in the EU?"*
* **Sources**: Reuters, Bloomberg Terminal headlines, equity analyst reports
* **Agent Output**:  
    
    
   **News Summary (April 2025)**: “EU AI Act expected to impact automation workflows. ServiceNow has stated intent to align with compliance standards.”  
   **Analyst Note**: Goldman Sachs highlighted: “We see minimal revenue risk due to proactive compliance and enterprise positioning.”  
   **Insight**: No change to forward guidance—market reaction muted.

**Why it works**: Shows real-time media monitoring + analyst synthesis—very prep-relevant.

### ✅ Example 4: Internal CRM + Dealogic – "White-Space in Product Penetration"

**Workflow**:

* **Trigger**: *"Where are we underpenetrated in this account?"*
* **Sources**: Internal CRM, product usage logs, Dealogic wallet-share estimates
* **Agent Output**:  
    
    
   **Product Usage Gaps**:  
  + No uptake on Procurement Cloud, HR Service Delivery, or Industry-Specific Modules  
     **Revenue Wallet Gap**:
  + We capture 38% of estimated tech spend in Digital Ops vs. peers at 62%  
     **Pitch Hook**: “Enterprise IT spend optimization using automation in under-utilized workflows”

**Why it works**: Mixes internal + external data to guide banker strategy.

### ✅ Example 5: SEC Filings + Risk Factors – "Geopolitical Risk Flagging"

**Workflow**:

* **Trigger**: *"Are there any geopolitical risks that have recently been emphasized?"*
* **Source**: SEC 10-K and 10-Q risk sections
* **Agent Output**:  
    
    
   *"In 2024 filings, ServiceNow elevated language around ‘Taiwan Strait tensions’ impacting hardware supply chain."* *"Also noted cybersecurity escalation due to U.S.-China export controls."*

**Why it works**: Highlights semantic shifts across filings—can be compared to previous years automatically.

### ✅ Example 6: Earnings Call Agent – "Exec Commentary Synthesizer"

**Workflow**:

* **Trigger**: *"What did the CFO say about enterprise demand softness in the last call?"*
* **Source**: Earnings call transcript (Q1 2025)
* **Agent Output**:  
    
    
   *“We’re seeing elongation in sales cycles within financial services—buyers are cautious but not pulling back entirely.” — Gina Matsumono (CFO)* *“We’ve shifted focus to land-and-expand versus upfront platform deals.”*

**Why it works**: Extracts voice-of-executive signal and ties it to pitch approach.