



welcome



# Learn, Share, Grow...

- 11+ years - B2B SaaS.
- Data, Analytics, & AI passionate.
- Low code & No code.
- Holistic Growth ↔ Knowledge Sharing.
- One among 5 Data Platform MVPs in India.



**Dinesh Kumar P**

**Product Manager**

**Reports & Analytics**

LinkedIn 



**Microsoft®**  
Most Valuable  
Professional



# Data Analytics with Generative AI

Tools, Techniques, & Ethical Insights

# Business Decisions: Intuition to Information

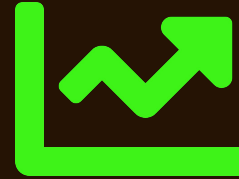
## Tradition

**Intuition** led the business.



## Future

**Technology** craft the tale!
















# Data to Actions

100 BI developer  
Data into Information into  
Reports

 Storyteller  
Reports into Insights

 Decision makers  
Insights into Actions

	Reports + Dashboards		Data Stories	
1. Focus	Descriptive	What?	Why?	Explanatory
2. Scope	Comprehensive			Selective
3. Depth	Summarized (High-level)			Examined (Low-level)
4. Cadence	Recurring			Ad-hoc + Single Use
5. Emotion	Factual			Persuasive
6. Outcomes	Observations to Questions	 → 	 →  → 	Insights to Actions
	Analysis			

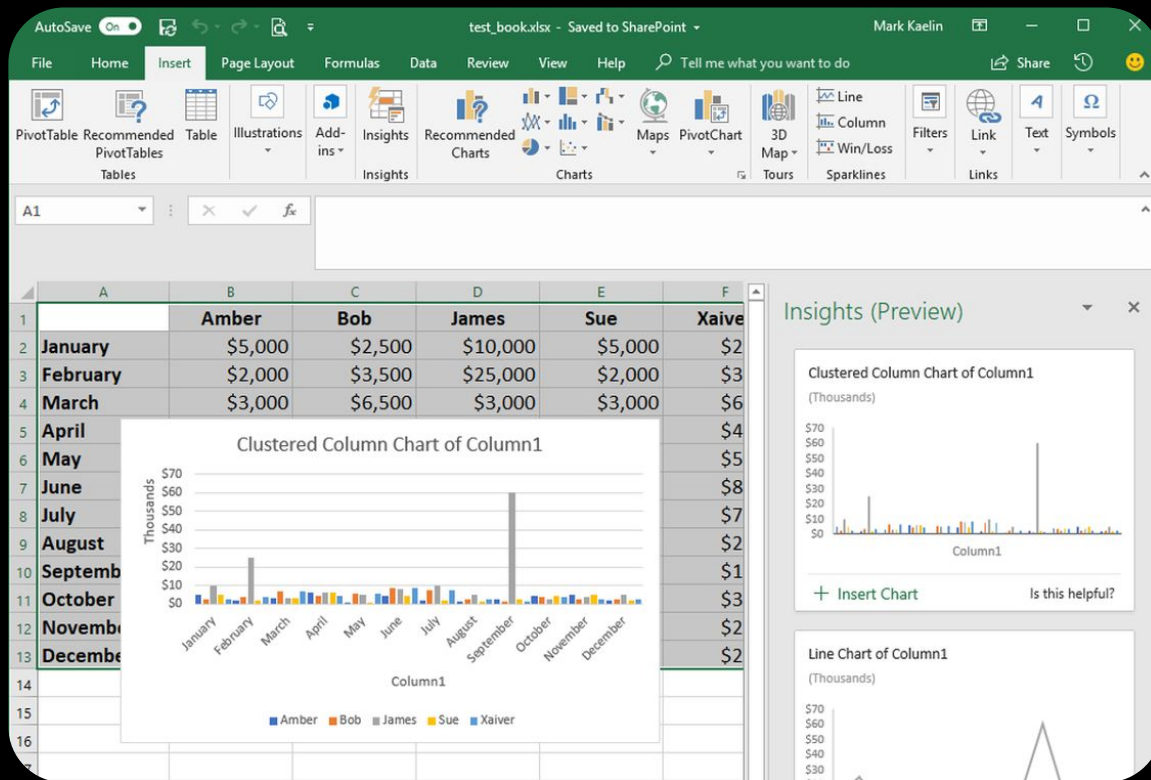
Effectivedatastorytelling.com



# Current methods

## Data analytics

# BI tools & Microsoft Excel Insights



# Storytelling...

## 1. Anyone can understand

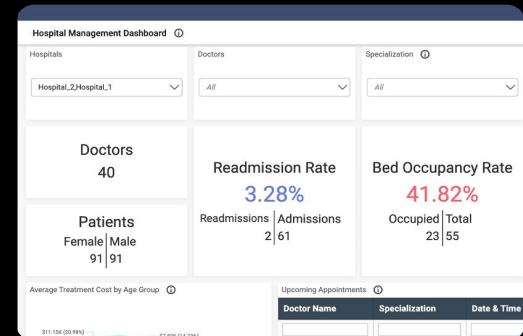
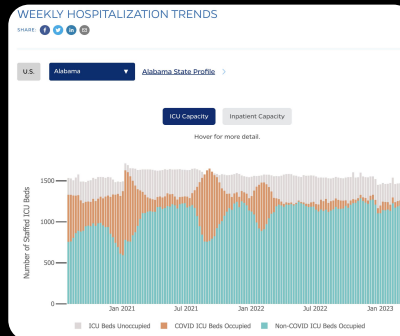
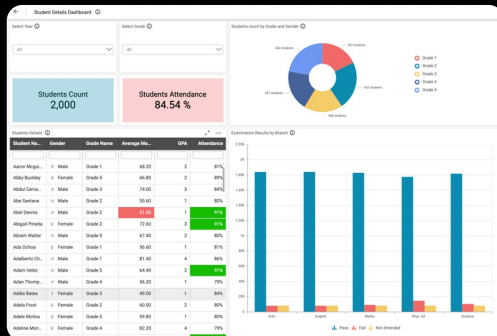
Can communicate the **insights**, such that anyone can understand the **context**.

## 2. Minimal content

Next version of dashboard that **addresses one major question** or problem alone.

## 3. Personalized to target audience

**Personalized to one or a set of target audience** for whom the insights are essential.







# New methods

(Extracting) story/insight from data



# Gen AI - Get Insights via Conversations

*Show me all claims that are high risk of fraud and over \$2,000).*

*I want to visualize how our sales have changed over time.*

*Create a scatterplot to evaluate the relationship between age and credit score.*

# Gen AI - Narrative Science - ChatGPT

 You

Can you improvise the charts to highlight the insights with words and use appropriate colors?

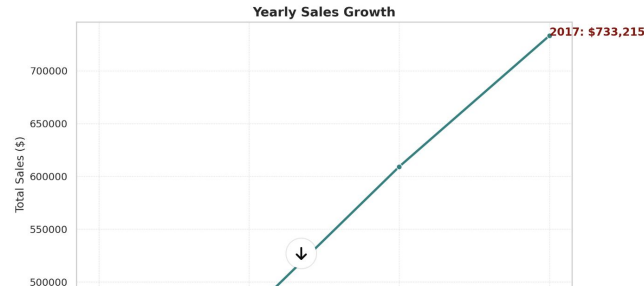


**Data Analysis & Report AI**

To enhance the clarity and impact of the charts, I'll reimplement them with more descriptive annotations and choose colors that effectively communicate the insights. Let's create improved versions of the charts with added annotations to highlight key insights and ensure the color schemes aid in interpreting the data accurately.

1. **Annotated Yearly Sales Growth:** Highlighting the growth trend with annotations.
2. **Top 10 Products by Sales with Descriptions:** Emphasizing top products and their sales values.
3. **Enhanced Sales Distribution by Category:** Using clear labels and colors to distinguish categories.
4. **Annotated Customer Segment Sales:** Detailing the sales contribution of each segment.
5. **Regional Sales vs. Profit with Insights:** Using contrasting colors for better differentiation and including insights directly on the chart.

Let's start with the annotated yearly sales growth chart.



# Microsoft Project Sophia

1 reference

## Overview

### Quick Overview

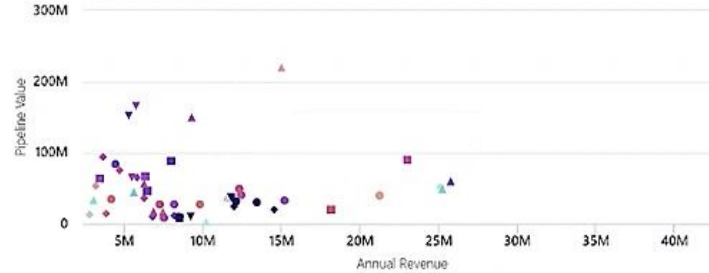
The Excel file 'Sales Performance' contains data on 50 accounts across various industries. It includes details such as account name, industry, annual revenue, revenue target, key decision-makers, main challenges, account objectives, key products/services, contract renewal date, pipeline value, competitors, account relationship strength, marketing campaigns, upsell/cross-sell opportunities, next action steps, sales rep, and territory.

### Analysis

- **Top Accounts in Education Industry:** The top three accounts in the Education industry by annual revenue are **E-Learn Pro** (\$8,200,000), **EduGaming Co.** (\$7,500,000), and **Education Innovators** (\$6,400,000).
- **Top Accounts in Energy Industry:** In the Energy industry, the top three accounts by annual revenue are **Green Energy Co.** (\$8,220,000), **Green Energy Co.** (\$8,020,000), and **CleanWater Technologies** (\$4,200,000).
- **Top Accounts in Finance Industry:** The top three accounts in the Finance industry by annual revenue are **Financial Solutions** (\$25,800,000), **Financial Services Inc.** (\$15,222,000).
- **Top Accounts in Healthcare Industry:** In the Healthcare industry, the top three accounts by annual revenue are **HealthFit Solutions** (\$14,560,000), **HealthTech Innovations** (\$9,300,000), and **Wellness First** (\$9,230,000).

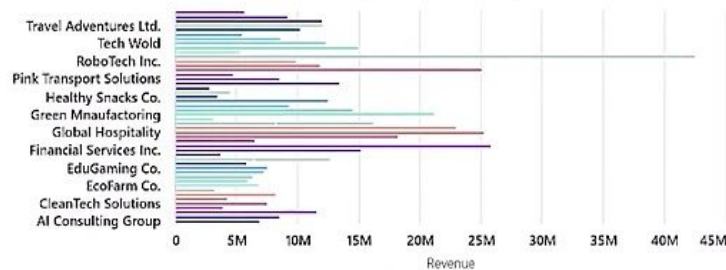
1 reference

## Relationship between Annual Revenue and Pipeline Value for each Sales ...



1 reference

## Annual Revenue of Each Account Grouped by Sales Rep



1 reference

## Suggested next steps

- ✎ Generate email draft using the conte...  
Follow up action
- 📁 Analyze the correlation between Ann...  
Explore or analyze data
- 📁 Identify key challenges and objective...  
Explore or analyze data
- 📁 Evaluate the performance of each sal...  
Explore or analyze data
- 📁 Examine the effectiveness of differen...  
Explore or analyze data

# Akkio

Chat Explore

Explore your data

Connect Slack Account (Beta)

D

Dinesh Kumar

6:34 pm

Make a scatterplot of sales vs. quantity vs. Discount by Category. Make the Discount as size of bubble.

Akkio AI — Interpretation

6:34 pm

- Create a scatter plot using the data with 'Sales' on the x-axis and 'Quantity' on the y-axis
- Size the data points based on the 'Discount' value
- Color the data points based on the 'Category' of the product

Show More

Akkio AI

6:34 pm

Scatter plot of Sales vs. Quantity by Category

Download


+ Add to Report

Bubble size represents Discount

Furniture

Office Supplies

Technology



Ask a question about your dataset...

## Chat instructions

### Context

What would you like Chat Explore to know about this application to provide better responses? For example:

- This dataset is customer engagement data

### Instructions

How would you like Chat Explore to respond? For example:

- Respond only in spanish
- Provide short and concise answers only

### Suggestions

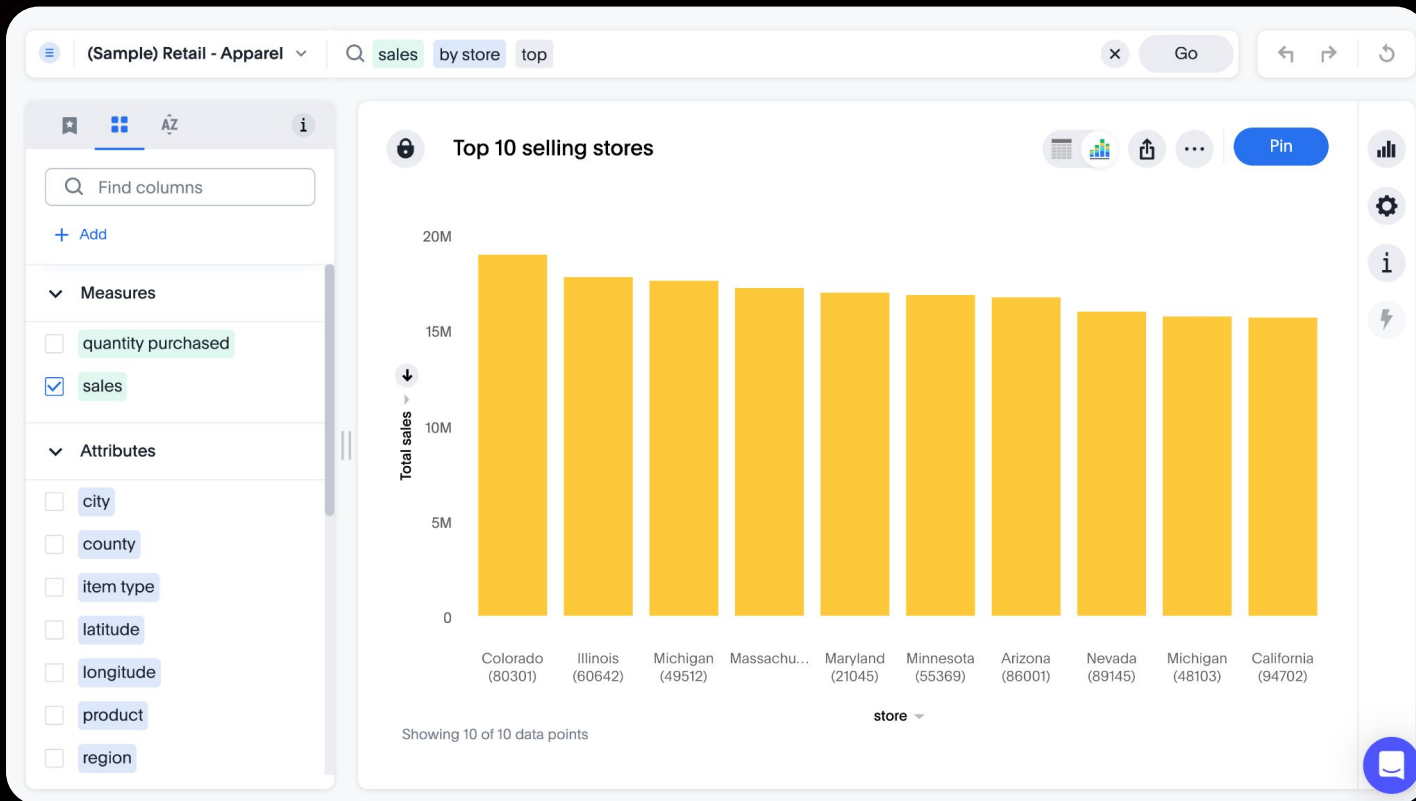
Customize the default chat suggestions by writing a list of suggestions separated by newlines. For example:

What is the average net media cost by campaign ID?  
What is the

Cancel

Save changes

# Thoughtspot



# Beyond a tool / tech

## **Dimensions:** Describe Data

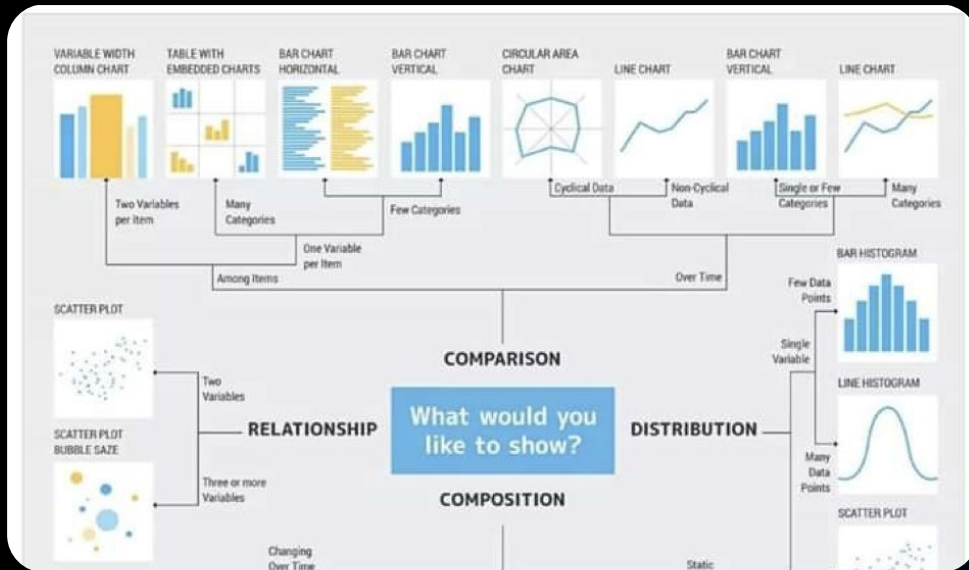
Example: Location Dimension – City Name, Latitude, Longitude

## **Metrics:** Measure

Example: Location Metric - Population

Superstore pivot

Sum of Sales	Segment	Ship Mode		
State	Consumer	Corporate	Home Office	Grand Total
City				
> Alabama	7,538	10,969	1,004	19,511
> Arizona	16,422	11,737	7,124	35,283
> Arkansas	8,802	2,464	412	11,678
> California	229,656	147,189	60,666	457,731
> Colorado	15,795	9,946	6,369	32,110
> Connecticut	5,936	5,716	1,734	13,386
> Delaware	16,962	8,313	2,178	27,453
> District of Columbia	2,754		112	2,866
> Florida	32,701	22,483	34,295	89,479
> Georgia	24,453	15,983	8,667	49,103
> Idaho	1,444	2,628	308	4,380
> Illinois	45,183	15,982	18,997	80,162
> Indiana	14,983	31,786	6,780	53,549
> Iowa	2,099	911	1,567	4,577
> Kansas	699	898	1,319	2,916
> Kentucky	20,436	7,929	8,233	36,598



*Thank  
you!*

LinkedIn

