

ANALYZE **Intermediate** 20 MIN · UPDATED 2026-09-30

Run a monthly sales review.

Process regional sales data, summarize with AI, and prepare a presentation deck for the leadership team.

MICROSOFT 365

Excel

PowerPoint

Teams

WORKS WITH

Copilot

ChatGPT

Claude

Business Outcome

A comprehensive presentation deck with summarized regional insights and action items.

Workflow Steps

Step 1: Clean data in Excel

Excel

Import the raw .csv and fix inconsistent region names or date formats before summarizing anything — a region logged as both "US-East" and "United States - East" will silently split into two rows in any pivot and throw off the regional comparison.

Use Power Query for the cleanup if this report recurs monthly (it saves the transformation steps for next time); a one-off PivotTable grouped by region is fine if this is a single ad hoc pull.

Step 2: Analyze the results

Copilot

ChatGPT

Claude

Hand over the pivot summary table, not the raw row-level export — a clean, pre-aggregated summary is what lets the AI reason about regional comparisons accurately instead of re-deriving totals itself from thousands of rows. If Copilot is licensed, ask it directly inside Excel so it can reference the live pivot; otherwise copy the summarized table into ChatGPT or Claude.

****Prompt:****

> Analyze this monthly sales summary. Identify the top 3 performing regions, the 2 regions with the highest drop in performance compared to last month, and suggest 3 focus areas for the review meeting.

Step 3: Build the presentation

PowerPoint

Use your team's standard review deck as the starting template (Slide Master already set) rather than building new slides from scratch, and fill in the five sections.

Overview, top regions, underperformers, anomalies, next steps — with the validated numbers, not the AI's draft wording verbatim; rewrite anything that reads like a summary rather than an insight.

Step 4: Share the review in Teams

Teams

Post the deck to the leadership channel with enough lead time for people to skim it before the meeting, and link the cleaned Excel file alongside it — anyone who wants to check a specific number should be able to trace it back without having to ask you directly during the review.

✓ Check the work

- Verify total revenue in the deck matches the sum of the raw export.
- Confirm the AI did not reference a region absent from the source data.
- Reconcile the flagged anomalies against the underlying rows before presenting them as facts.



Expected Outcome

A 5-slide PowerPoint deck highlighting top regions, key anomalies, and actionable next steps.

Want help rolling this out across your team? [Go to Liminals.Tech](#) 