

For a consumer packaged goods company, I created a GenAI-powered strategy report delivered via Microsoft Teams to 75 salespeople.

Problem

Every week, salespeople looked through large spreadsheets in Microstrategy detailing which regions they need to sell to to reach monthly sales goals. Because this was a manual process, salespeople may miss important regions and need lengthy training to understand these reports.

Solution

I queried sales data from an SAP database using SQL and stored the needed data as a table in the Amazon Redshift data warehouse.

I used LangChain to create a SQL AI agent. The agent takes a prompt stored in Amazon S3 detailing how to find optimal sales strategies. The agent writes SQL code to query the Amazon Redshift table.

The agent finds the scope of each salesperson and identifies which geographical areas need to be focused on to reach monthly sales goals.

The geographical areas are formatted into a message form by the GenAI agent.

I then created an API in Microsoft Power Automate which accepts a message and an email address.

I send the generated message and the email address of the salesperson to this API and Power Automate sends a Microsoft Teams message to the salesperson. We used Microsoft Teams rather than email because salespeople will receive these messages when they are in the field, selling. They are not typically checking their emails often.

I created this algorithm in Python and ran it on a virtual machine in SageMaker so the program is scalable and can be accessed by other programmers.

Business Value

Because our sales strategy message is straightforward and focuses on the common goals the company has decided upon, we can reduce the training time needed to become an effective salesperson at this company.

- 1) Salespeople know which KPIs they should be targeting. Microstrategy reports hundreds of metrics but our message reports the most important
- 2) Mastery of Microstrategy spreadsheet analysis is no longer crucial. Our GenAI agent summarizes the most important findings in a Microstrategy spreadsheet.

Lastly, salespeople are less likely to miss key areas that they may overlook when searching through spreadsheets with hundreds and thousands of rows.