

5. Management reporting assistant

Project

AI helps produce monthly or weekly management reports.

Specific solution

The system connects to Excel, BI, CRM or ERP data and automatically prepares a management summary: what changed, where there are deviations, what caused them and what needs attention.

Example output

- Revenue increased by 8%, but the margin fell by 3 percentage points.
- Sales increased in the western region, but the share of new customers declined.
- Late payments from three large customers are causing the deterioration in cash flow.

Measurable results

- less manual report writing;
- faster decision preparation;
- better explanations of deviations;
- fewer Excel-related errors.

Technology format

Building a complete BI system is not always necessary. For many medium-sized companies, Power BI / Looker Studio / Excel plus an AI narrative layer is sufficient.