



Transforming **FP&A** Use-cases with **Gen AI**

Sales Analysis



Transforming FP&A Use-cases such as Sales Analysis with Gen AI

For Finance teams to offer strategic direction to senior business leadership, financial planning, and analysis teams can leverage the newest and most potent tools in their arsenal now. The integration of Generative Artificial Intelligence (Gen-AI) in this workflow has emerged as a transformative force, revolutionizing the traditional methods of deciphering past historical trends as well as identifying patterns that could not be determined using conventional rule-based methods so far. Further, data transformations and reconciliations need to be done to retrieve clean data from documents. Rule-based ETL approaches lack context and are not adaptive to any changes in source data and structures.

AI technology solutions involving machine learning and augmented by Gen-AI capabilities is likely to become a go-to assistant for finance teams to delve into vast datasets and to extract valuable insights. Gen AI's application in understanding historical trends extends beyond a mere overview of financial performance. It empowers businesses to understand patterns within sales data, whether it pertains to specific products, geographical regions, or distinct end-user categories. This granular level of analysis not only enhances the precision of financial planning but also provides a strategic advantage by uncovering new and differentiated trends.

Our Financial planning and analysis use case involves Sales analysis by enabling the retrieval of information and insights from within a dataset stored in CSV format.

How Gen-AI Can Redefine Sales Analysis

We use a daily sales dataset encompasses vital sales information, including shipment details, sales specifics, customer regions and locations, product categories, sold products, volumes, SKUs, and more.

The ValueXPA solution involves the integration of Large Language Models (LLMs), elevating data analysis to unprecedented levels. Employing AI in the process, our solution seamlessly amalgamates a suitable stack of technology platforms and frameworks to facilitate querying and retrieval from finance data tables.

How does ValueXPA Efficiently Manage Financial Data and Uncover Insights?

In this approach, ValueXPA's solution transforms CSV data into a structured and easily navigable data frame. This not only enables the finance team to simplify data manipulation but also facilitates streamlined analytical processes, ensuring that the dataset is transformed to uncover insights effectively.

How does ValueXPA solution integrate LLMs to enhance Sales data analysis and insights

ValueXPA's solution employs LLM models to read CSV files and uses Data Frames for querying. The integration of LLM enhances the analysis of sales data through natural language conversations. This powerful language model facilitates user interaction and interpretation of data, providing effortless access to visualizations of sales trends, customer behaviours, and product performances. The use of upgraded LLM models of LLMs further strengthens analytical capabilities for sharper insights.

How AI-enabled visualisation transforms data into compelling visualisations

ValueXPA seamlessly incorporates a visualisation framework, and it plays a crucial role in presenting insights with simplicity. Its clean and intuitive interface empowers users to effortlessly interact with data, elevating the overall user experience.

ValueXPA's xpAI Solution enables Finance teams to seamlessly convert intelligent response produced by the AI model into visually captivating and informative charts, augmenting the interpretation of insights in a consumable form for business and finance leadership.

How xpAI chatbot can drive differentiated insights in FP&A Sales Analysis

The xpAI Chatbot Agent efficiently connects the above-mentioned components, streamlining the process of retrieving relevant information from Sales data CSV files external to the LLM. It transforms the traditional, time-consuming task of handling such documents into a natural language conversation, providing finance professionals with swift access to critical insights on the sales trends observed across geographies, product categories, sales by SKUs and so on. For finance leaders and business leaders to make critical decisions on resource allocation, performance management and KPI tracking and measurement, the solution serves as a key-enabler.

How you can benefit from xpAI solution

Unlike traditional data analysis methods, this solution goes the extra mile by delivering results in visually appealing formats like bar graphs and pie charts. This dynamic aspect not only streamlines the data analysis process but also enhances its accessibility and engagement.

The solution transforms data analysis into an interactive conversation. Through data visualization, users can now engage with their datasets in a more conversational and intuitive manner, creating a tool that effectively bridges the divide between intricate data and easily understandable insights.

xpAI Solution leverages LLM models to offer businesses rapid access to vital information. However, ethical and responsible usage is emphasized to ensure data integrity and security, highlighting the chatbot's potential for a more profound and rewarding approach to data management in contractual agreements.

How the bot assistant helps

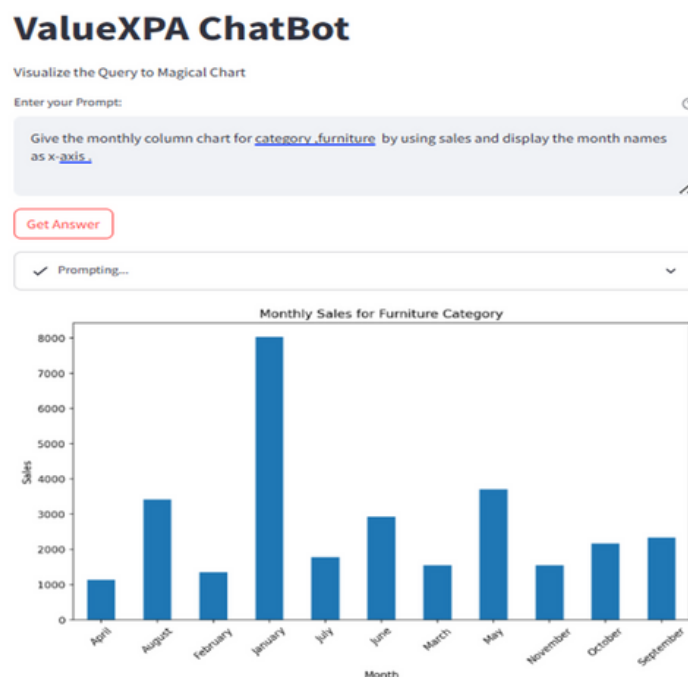
Our xpAI Chatbot helped respond to queries from business and finance leaders on performance management and insights regarding sales data. The below screenshots present the output generated from sample Sales database.

Here are the steps to use the chatbot.

- Clicking "Get Answer" activates xpAI Chatbot and employs OpenAI to transform the user's prompt into a logical script
- The dynamic adaptation enhances ValueXPA's effectiveness as a tool for interactive data exploration.

How our Chatbot Solution Works

To provide a clearer insight into our work, we've attached a few screenshots displaying the output generated from the vendor invoices and credit card statements samples.



Visualize the Query to Magical Chart

Enter your Prompt:

create the pie chart for product using sales of Delaware [state](#)

Get Answer

✓ Prompting...



ValueXPA ChatBot

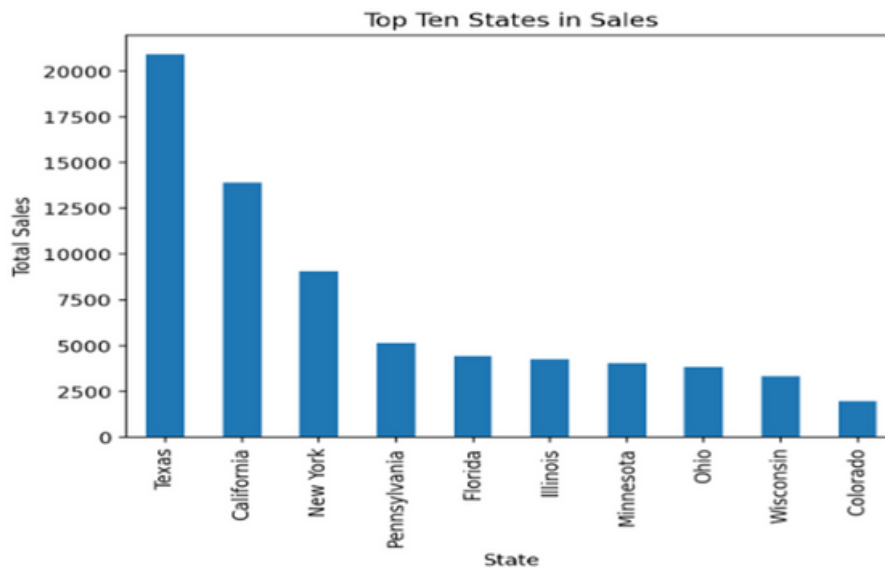
Visualize the Query to Magical Chart

Enter your Prompt:

Create a bar chart for top ten states in [sales](#)

Get Answer

✓ Prompting...





Karthikeyan V Raaj
Founding Partner

About the Author:

Karthikeyan V Raaj has about 20 years of experience as a Senior Finance Executive and as a CFO business partner. He has championed strategic projects and helped transform finance functions to enable growth of his client organizations. Currently, he is the Founding Partner of ValueXPA, a Global technology-enabled Finance-as-a-Service Partner for Small and Mid-sized Businesses and Institutions. As a CFO Partner, he has advised and helped over 50 small and mid-sized businesses, start-ups and Not-for-profit Institutions - across areas like financial planning, tracking and managing their financial performance through systems, optimizing finance processes through automation and outsourcing.

His specialties include CFO Partnering on Strategic and Business Financial Advisory, Finance Transformation, Financial Modelling, Financial Planning and Analysis, Performance Management Reporting & Decision-support, Development of KPIs and Management Dashboards, Valuation and Analytical Process Automation using Low code/ No code tools. Earlier, he held leadership roles at Barclays and S&P Global. For Global Business Leaders/companies & Financial Institutions, he offered Financial Decision and Controller Solutions and also built & led Investment Research teams globally. He holds an MBA degree specializing in Finance and is also a qualified Engineer.

**For more information on business partnering
please connect with us!**

Write to us at info@valuexpa.com

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