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PLUG & PLAY AI BUSINESS SYSTEMS

AI KPI & Reporting System

Delivery Pack

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Version 1.0

1. System Overview

Field	Description
System Name	AI KPI & Reporting System
Business Area	Management Reporting / Operations / Performance Review
Primary Users	Business owner, manager, operations lead, sales manager, marketing manager or reporting owner.
Purpose	To help the team transform raw KPI data into executive summaries, insights and clear action points.
Expected Benefit	Faster reporting preparation, clearer management updates and a more consistent connection between numbers and actions.

2. Business Problem

The business may already collect useful data, but turning that data into a clear management update can be slow, manual and inconsistent.

The AI KPI & Reporting System creates a repeatable workflow for summarizing performance, explaining key movements and identifying practical next steps. It does not replace human review or data validation. It helps the team structure the reporting process and communicate insights more clearly.

3. Workflow Map

1. Collect KPI data from approved sources and place it in the input template.
2. Structure the reporting context: period, comparison, targets and business notes.
3. Run the executive summary prompt to create a first management-level draft.
4. Run the insight prompt to identify key movements, trends and watch areas.
5. Review all numbers and interpretations against the source data.
6. Finalize the report using the monthly report template.
7. Share the summary with decision-makers and record agreed actions.
8. Use the action tracker to follow up in the next reporting cycle.

4. Tools Used

- Spreadsheet tool such as Google Sheets or Excel for KPI input and tracking.
- ChatGPT or Claude for summarizing, structuring and drafting insights.
- Google Docs, Word or Slides for final management reports.
- Optional: CRM, ads platform, ERP, analytics platform or Looker Studio as data sources.
- Optional: project management or task tool for action tracking.

5. Required Inputs Before Use

- KPI data for the reporting period.
- Comparison data such as previous month, previous quarter or target.
- Business notes that explain campaigns, operational changes or external events.
- Definitions for each KPI, especially when different teams use different terms.
- The intended audience for the report.
- Confidentiality rules for what data can be copied into AI tools.

6. Prompt Library

Prompt	When To Use It
KPI Input Structuring Prompt	Use when raw data needs to be turned into a clean reporting input.
Executive Summary Prompt	Use when creating a short management-level overview of the reporting period.
Insight Generation Prompt	Use when identifying key movements, trends and possible explanations.
Action Point Prompt	Use when turning insights into recommended next steps.
Management Email Prompt	Use when sending the final summary to owners, managers or stakeholders.

Example master prompt:

Act as a business performance analyst. Based on the KPI data and business context below, create a concise executive summary. Include: key movements, possible explanations, risks, opportunities and recommended action points. Do not invent causes. Where the data is insufficient, state what should be checked by the team. Keep the tone clear, practical and management-oriented.

Paste below: Reporting period, business context, KPI table, comparison period, targets, notes, audience and desired format.

7. SOP — How To Use The System

When to use this system

Use this workflow for weekly, monthly or quarterly reporting when the team needs to turn KPI data into a clear management update.

Who should use it

The reporting owner, manager, business owner or department lead responsible for preparing performance updates.

How to use it

1. Collect the approved KPI data and check that the numbers are complete.
2. Add the data to the KPI input template.
3. Add business context such as campaigns, operational changes or known issues.
4. Run the executive summary prompt.
5. Run the insight and action point prompts if deeper interpretation is needed.
6. Review every number and interpretation before sharing.
7. Move the final output into the report template.
8. Share the report and record agreed actions in the action tracker.

8. Quality Control Checklist

- All numbers were checked against the original data source.
- The reporting period and comparison period are clear.
- No unsupported causes or claims are included.
- Possible explanations are clearly separated from confirmed facts.
- The summary is concise enough for management review.
- Action points are practical and assigned to the right owner where possible.
- Confidential information has been handled according to internal rules.
- A human reviewed the final version before sharing.

9. Example Output Structure

Section	Purpose
Executive Summary	A short overview of the reporting period.
Key KPI Movements	What increased, decreased or stayed stable.
Possible Explanations	Contextual interpretation that must be reviewed by the team.
Risks / Watch Areas	Areas that need attention in the next cycle.
Recommended Actions	Practical next steps based on the report.
Follow-Up Tracker	Actions to revisit in the next reporting cycle.

10. Team Training Notes

- The system supports reporting, but the source data remains the source of truth.
- AI can help summarize and interpret, but it cannot confirm business causes without context.
- Users should add short business notes before running prompts.
- The best outputs come from clean KPI inputs and clear comparison periods.
- Final reports should always be reviewed before sharing with decision-makers.

11. Next Steps

- Use the system for the next reporting cycle.
- Collect feedback from the users and decision-makers.
- Track how much time is saved during report preparation.
- Identify which KPI explanations were useful and which need refinement.
- Update the prompt library and SOP after the first real use.
- Consider adding department-specific reporting workflows for sales, marketing or operations.

Ready to Implement This System?

Let's implement this AI-Powered Reporting & KPI System in your business and turn your data into clear, actionable decisions.

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Get in touch to get started.