



SQL Generation

MOST USED

Generate, refine & optimize SQL

```
SELECT region, sum(amount)
FROM orders GROUP BY region
ORDER BY 2 DESC;
```



Dashboard QA

Validate KPIs & visual hierarchy

02



Reporting Automation

Recurring reports & summaries

03



Executive Summary

Turn analysis into decisions

04

THE ANALYSTEDGE WORKFLOW FRAMEWORK

CORE FRAMEWORK



DEFINE



GENERATE



VALIDATE



BUILD



AUTOMATE

ANALYSTEDGE OPERATING SYSTEMS

WORKFLOW STARTER SERIES · VOLUME 01

AI Workflow System

25+ practical AI workflows for SQL, reporting, dashboards, and automation.

Built for analysts who want systems, not hacks.

5

WORKFLOW SYSTEMS

25+

PRACTICAL WORKFLOWS

10+

COPY/PASTE PROMPTS

5

WORKED EXAMPLES

◆ Real analyst workflows. Real business use cases.

AnalystEdge.ai

FREE TIER 2 RESOURCE · 2026 EDITION

Built for Data Analysts, Business Analysts, Analytics Managers, and BI Professionals

Inside this system

Five workflow systems containing 25+ practical workflows, the AnalystEdge Workflow Framework and Map, and a bonus toolkit. Every system follows the same structure so you apply it the same way each time.

SECTION	PAGE
01 Introduction & how to use this system	03
02 Recommended AI tools for analysts	04
03 The AnalystEdge Workflow Framework	05
— The AnalystEdge Workflow Map	06
04 Core Workflow Systems	07
— SQL Generation	08
— Reporting Automation	11
— Dashboard QA	14
— Data Exploration	17
— Executive Communication	20
05 The Bonus Toolkit	23
06 Keep building your edge	28

A system, not a prompt pack

This is a working system for using AI inside real analyst workflows. It is built around repeatable processes, not isolated prompts. A prompt gives you one answer. A workflow gives you a result you can trust, hand off, and run again next quarter.

Why workflows beat prompts

A clever prompt is disposable. A workflow encodes the steps, the validation, and the reusable assets, so the quality holds up and the work compounds.

How to use this system

Each system is self-contained. Read the purpose, copy the prompt, follow the steps, and adapt the worked example to your own data. Save what works as your own template.

Use AI responsibly

AI accelerates analysis; it does not own it. Never ship a number you have not validated. Treat every generated query, summary, or chart as a draft that you verify against something you already trust.

Who this is for

Data analysts, business analysts, analytics managers, and BI professionals who want leverage from AI without giving up rigor.

THE CORE IDEA

AI should improve your workflow, not replace your judgment. Modern analysts need systems, not hacks. Every page in this document reinforces that.

AI tools for analysts

The workflows in this system are tool-agnostic. These three handle the bulk of analyst work well. Pick based on the task, not the brand.

ChatGPT

BEST FOR

Structured tasks, templating, quick iteration

Strong general-purpose assistant. Reliable for SQL drafts, report scaffolding, and step-by-step reasoning.

Claude

VERSATILE

BEST FOR

Long-form reasoning, narrative, large context

Excellent for explaining legacy SQL, writing executive narrative, and working across long documents and tone.

Gemini

BEST FOR

Research, multimodal, Google data context

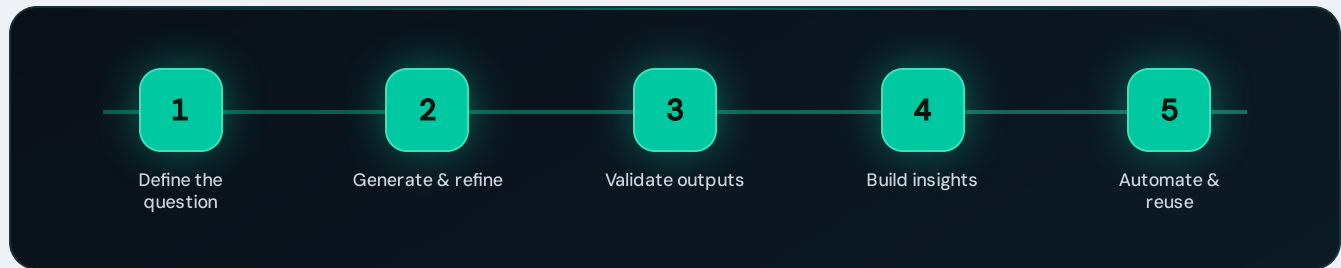
Useful for exploration, summarizing sources, and tasks that touch the Google ecosystem.

💡 HOW TO CHOOSE

Use the same workflow regardless of tool. Reach for long-context models when reasoning over big inputs, and faster models for quick, repeatable drafts. The system is what matters, not the vendor.

The AnalystEdge Workflow Framework

Every system in this document runs on the same five steps. Learn the framework once and you can apply it to any analysis, with or without AI. This is the backbone of the AnalystEdge method.



01 Define the business question

Translate a vague request into a precise, answerable question. State the metric, grain, time window, and filters before any prompt.

02 Generate and refine the analysis or SQL

Use AI to draft queries, logic, or structure. Iterate in small steps rather than asking for the full answer at once.

03 Validate outputs

Never ship a number you have not checked. Reconcile against a known total, spot-check edge cases, and review assumptions.

04 Build reporting and insights

Turn validated output into a narrative a stakeholder can act on. Lead with the so-what, support with the figures.

05 Automate, document, and reuse

Save the prompt, the query, and the logic as a reusable asset so the next run takes minutes, not hours.

Where the framework gets applied

The lifecycle of analyst work products, from the first business question to a saved, reusable asset. Each stage hands its output to the next, and the loop compounds as those assets accumulate.

- ③ The five-step **AnalystEdge Workflow Framework** (Define, Generate, Validate, Build, then Automate and Reuse) runs inside every stage below. Validation is continuous, not a single stop: each stage checks its output before passing it on. The framework is **how** you work. This map is **where** you apply it.



Business Question

Define the metric, grain, time window, and filters.



SQL Generation

Draft and refine the query with AI, then reconcile it against a trusted total.



Exploration

Investigate drivers and anomalies with ranked hypotheses, testing each before you accept it.



Dashboard

Build the view and QA it against a repeatable standard.



Executive Summary

Translate the finding into a decision the reader can act on, every figure checked.



Automation

Schedule and templatize so the next run takes minutes.



Reusable Asset

Save the prompt, query, and logic. The work compounds.



The loop compounds. Each reusable asset makes the next business question faster to answer.

04

THE CORE

Core Workflow Systems

Five repeatable systems, each built on the AnalystEdge Workflow Framework, and each containing five practical workflows. Same structure every time: overview, prompt, and a worked example, end to end.

SQL Generation

A system for producing correct SQL from a plain business request: write it, repair broken queries, optimize slow ones, and decode legacy code you inherited. You still own the logic and the validation.

INCLUDED WORKFLOWS

5 WORKFLOWS

- ✓ Generate SQL from plain-English requests
- ✓ Optimize slow SQL
- ✓ Convert SQL between dialects
- ✓ Repair broken SQL
- ✓ Explain legacy SQL

⚡ TYPICAL IMPACT

- ✓ Draft correct SQL faster, from request to query
- ✓ Reduce query rework and debugging
- ✓ Save 30 to 60 minutes per request

PURPOSE

Turn business questions into correct, readable SQL faster, from first draft to optimized final.

WHEN TO USE IT

Ad hoc pulls, recurring report queries, refactors, and decoding undocumented legacy SQL.

BEST AI TOOLS

Claude or ChatGPT for query logic and explanation. Either works well with schema context.

INPUTS NEEDED

Table and column names, the grain, the business question, and one known total to validate against.

WORKFLOW SYSTEM 01 / SQL

Run this system using the AnalystEdge Workflow Framework, then save the prompt below to your reusable workflow library.

STEP-BY-STEP WORKFLOW

- 1 Give the model your schema.** Paste the relevant table names, key columns, and types. Models guess badly without this. A short schema block beats a long description.
- 2 State the question precisely.** Name the metric, the grain (per day, per customer), the time window, and any filters. Ambiguity here is the top cause of wrong SQL.
- 3 Ask for the query plus its assumptions.** Request the SQL and a short list of what it assumed. The assumptions are where most errors hide.
- 4 Refine in small steps.** Add one change per turn: a filter, a join, a window. Iterating beats regenerating the whole query each time.
- 5 Validate before you ship.** Reconcile the total against a number you already trust, then spot-check a few rows by hand.

COPY / PASTE PROMPT

SQL Generation

```
You are a senior analytics engineer. Write PostgreSQL.

# Schema
orders(order_id, customer_id, order_date, region, amount)
customers(customer_id, signup_date, segment)

# Question
[Monthly net revenue by region for 2025, with year-over-year % change.]

# Rules
- Return one row per month per region.
- Use CTEs, not nested subqueries.
- List every assumption you made below the query.
- Do not invent columns that are not in the schema.
```

⚠ COMMON MISTAKES

Accepting SQL without checking the join grain. A fan-out join silently doubles revenue. Always confirm row counts before and after a join.

💡 PRO TIPS

Keep a saved schema block per database. Pasting it first makes every future query faster and far more accurate.

🔗 ADVANCED UPGRADE

Wrap your validated queries into a tested, parameterized template library so a new monthly pull is a two-minute job. This is the core of the AnalystEdge SQL System.

Worked example, end to end

The AnalystEdge Workflow Framework, applied step by step: define, generate, validate, build, then automate and reuse.

1

DEFINE · BUSINESS QUESTION

"Show me how each region is trending versus last year."

Metric: net revenue. Grain: month by region. Window: 2025 vs 2024. Objective: surface regional momentum.

2

GENERATE · PROMPT AND GENERATED SQL

Role: senior analytics engineer. Context: orders + customers schema.

Task: monthly revenue by region with year-over-year change.

Constraints: use CTEs; list assumptions; do not invent columns.

MONTHLY_REVENUE.SQL

PostgreSQL · reviewed

```
1 WITH monthly AS (  
2   SELECT date_trunc('month', order_date) AS mth,  
3         region, sum(amount) AS revenue  
4   FROM orders  
5   GROUP BY 1, 2  
6 )  
7 SELECT mth, region, revenue,  
8        round(100.0 * (revenue - lag(revenue, 12)  
9              OVER (PARTITION BY region ORDER BY mth))  
10       / nullif(lag(revenue, 12)  
11       OVER (PARTITION BY region ORDER BY mth), 0), 1) AS yoy_pct  
12 FROM monthly  
13 ORDER BY region, mth;
```

3

VALIDATE · VALIDATION PROCESS

Reconciled the 2025 total against the finance close, and confirmed the join keeps one row per order before trusting the result.

4

BUILD · VALIDATED RESULTS TABLE

REGION TREND · FY2025 (VALIDATED)

REGION	REVENUE	YOY
EMEA	\$5.92M	+14.2%
AMER	\$5.14M	+9.8%
APAC	\$4.41M	+21.5%

5

AUTOMATE & REUSE · SAVED QUERY TEMPLATE

Saved as a parameterized query template in your reusable library, so next month's regional pull is a two-minute job.

Reporting Automation

A system for turning query results into repeatable reports: weekly business reviews, stakeholder summaries, and narrative insights that read the same way every cycle, without rewriting them from scratch.

INCLUDED WORKFLOWS

5 WORKFLOWS

- ✓ Weekly business reviews
- ✓ Executive scorecards
- ✓ Narrative insight generation
- ✓ Monthly KPI summaries
- ✓ Stakeholder updates

⚡ TYPICAL IMPACT

- ✓ Consistent executive reporting every cycle
- ✓ Faster stakeholder updates
- ✓ Save 1 to 3 hours per reporting cycle

PURPOSE

Produce consistent, narrative reports on a schedule instead of rebuilding them each period.

WHEN TO USE IT

Weekly business reviews, recurring KPI updates, and stakeholder summaries.

BEST AI TOOLS

Claude for narrative and tone, ChatGPT for structured templating. Both work from a fixed template.

INPUTS NEEDED

The metric set, the prior-period numbers, the audience, and a fixed report template.

WORKFLOW SYSTEM 02 / REPORTING

Run this system using the AnalystEdge Workflow Framework, then save the prompt below to your reusable workflow library.

STEP-BY-STEP WORKFLOW

- 1 Lock a report template.** Decide the sections, order, and tone once. The template is the system; the prompt only fills it.
- 2 Feed current and prior numbers.** Give the model this period and the comparison period so it can describe change, not just state values.
- 3 Ask for narrative, not numbers.** Request what changed and why, in plain language, with the figures as support.
- 4 Constrain length and audience.** Set a word limit and name the reader. A VP review is not an analyst memo.
- 5 Save the template and prompt.** Store both as the reusable monthly asset so next cycle is a fill-in-the-blank job.

COPY / PASTE PROMPT

Reporting

```
You are a senior analyst writing the weekly business review.

# Inputs
This week vs last week KPI table (revenue, accounts, churn)

# Template (fixed)
Headline / What changed / Watch / Next steps

# Rules
- Audience: VP of Sales. Plain language.
- Lead with the so-what, not the method.
- Under 180 words. Flag anything you cannot explain.
- Do not invent reasons for a change.

[Paste KPI table here]
```

⚠ COMMON MISTAKES

Letting the model invent reasons for a change. Give it the context, or instruct it to flag anything it cannot explain rather than guessing.

💡 PRO TIPS

Keep one locked template per report. Consistency is what makes a recurring report feel trustworthy and effortless.

🔗 ADVANCED UPGRADE

A scheduled pipeline that pulls the numbers, drafts the narrative, and routes it for review. This is the AnalystEdge Reporting System.

Worked example, end to end

The AnalystEdge Workflow Framework, applied step by step: define, generate, validate, build, then automate and reuse.

1

DEFINE · WEEKLY BUSINESS REVIEW REQUEST

"Turn this week's KPIs into the Monday business review."

Audience: VP of Sales. Cadence: weekly. Sections: headline, what changed, watch, next.

2

GENERATE · PROMPT AND DRAFT NARRATIVE

Role: senior analyst writing the weekly review.

Template: Headline / What changed / Watch / Next.

Constraints: VP audience; under 180 words; flag anything you cannot explain.

WEEKLY BUSINESS REVIEW · DRAFT

Headline. Net revenue rose 6.1% week over week to \$4.28M, led by EMEA enterprise renewals.

What changed. EMEA grew 14% as three delayed renewals closed. AMER held flat. APAC slipped 4% on lower new-logo volume.

Watch. APAC pipeline coverage is below target for next quarter.

Next. Sales to confirm the APAC pipeline by Thursday.

3

VALIDATE · CONFIRM THE METRICS

EXECUTIVE KPI SNAPSHOT · WEEK 21

REVENUE

\$4.28M

▲ 6.1%

ACCOUNTS

18,420

▲ 6.1%

CHURN

2.1%

▲ 0.3pt

GROWTH

+6.1%

▲ WoW

Reconciled each figure against the warehouse and flagged the APAC dip for sales to confirm before publishing.

4

BUILD · EXECUTIVE SUMMARY

Finalized and published Monday at 8am: net revenue up 6.1% to \$4.28M, EMEA-led, with the APAC dip flagged for follow-up.

5

AUTOMATE & REUSE · SAVED REPORTING TEMPLATE

The template and prompt are saved as your reusable weekly review, so the next cycle is fill-in-the-blank.

Dashboard QA

A review system that catches the errors that quietly erode trust in a dashboard: wrong KPIs, inconsistent names, broken hierarchy, and silent anomalies, before a stakeholder ever sees them.

INCLUDED WORKFLOWS

5 WORKFLOWS

✓ KPI validation

✓ Dashboard hierarchy review

✓ Executive-readability review

✓ Naming consistency review

✓ Anomaly detection review

⚡ TYPICAL IMPACT

✓ Catch KPI errors before release

✓ Improve stakeholder trust in the numbers

✓ Prevent costly reporting mistakes

PURPOSE Validate a dashboard against a repeatable QA standard before it ships.	WHEN TO USE IT Before publishing, and after any change to the underlying data source.
BEST AI TOOLS Claude or ChatGPT to run a structured checklist against your dashboard spec and definitions.	INPUTS NEEDED KPI definitions, the dashboard layout, and your naming conventions.

WORKFLOW SYSTEM 03 / DASHBOARD QA

Run this system using the AnalystEdge Workflow Framework, then save the prompt below to your reusable workflow library.

STEP-BY-STEP WORKFLOW

- 1 **Define the QA standard once.** Write down the KPI definitions, naming rules, and expected ranges. This is your reusable standard.
- 2 **Give the model the spec.** Provide the dashboard layout and the definitions so it can compare intent against implementation.
- 3 **Run the checklist.** Definitions, naming, hierarchy, anomalies, and ten-second readability, every time.
- 4 **Triage by severity.** Separate blocking errors from polish. Fix what misleads first.
- 5 **Re-run after fixes.** QA is not a one-time event. Re-run whenever the data or layout changes.

```
COPY / PASTE PROMPT Dashboard QA

You are reviewing an executive dashboard before release.

# Run this checklist
1. Does each KPI match its written definition?
2. Are metric names consistent across tiles?
3. Is the visual hierarchy correct (primary KPI top-left)?
4. Any values outside expected ranges?
5. Is the dashboard readable in under 10 seconds?

# Return
Findings grouped by severity, with the fix for each.

[Paste dashboard spec + KPI definitions]
```

⚠ COMMON MISTAKES

Treating QA as a one-time event. Definitions drift and sources change. Re-run the checklist on every meaningful update.

💡 PRO TIPS

Keep KPI definitions in one place. Most dashboard errors are definition drift, not chart bugs.

🔗 ADVANCED UPGRADE

A standardized QA rubric scored automatically across every dashboard you own. This is the AnalystEdge Dashboard System.

Worked example, end to end

The AnalystEdge Workflow Framework, applied step by step: define, generate, validate, build, then automate and reuse.

1

DEFINE · QA OBJECTIVE

"QA this revenue dashboard before the board meeting."

Standard: definitions, naming, hierarchy, anomalies, readability. Trigger: pre-release.

2

GENERATE · QA CHECKLIST REVIEW

Run the checklist: definitions, naming, hierarchy, anomalies, readability.
Return findings grouped by severity, with the fix for each.

REVENUE DASHBOARD · UNDER REVIEW

NET REVENUE \$4.28M ✓	REVENUE (DEF.) gross/net? ⚠
ACCOUNTS 18,420 ✓	PRIMARY KPI mis-placed ⚠
✓ KPI definition correct	⚠ Revenue definition mismatch
✓ Naming consistent	⚠ Primary KPI not top-left

3

VALIDATE · CONFIRM FINDINGS

Confirmed the gross-versus-net flag against the written metric definition before sign-off.

4

BUILD · FINAL QA REPORT

Two blocking issues fixed: revenue redefined as net, and the primary KPI moved to the top-left. Dashboard signed off for the board.

5

AUTOMATE & REUSE · SAVED QA RUBRIC

The checklist is saved as a reusable QA rubric and run on every dashboard before release.

Data Exploration

A structured way to investigate a number that moved: form hypotheses, segment, test, and isolate the driver, instead of staring at a dashboard hoping the insight appears.

INCLUDED WORKFLOWS

5 WORKFLOWS

- ✓ Root-cause analysis
- ✓ Segmentation analysis
- ✓ Driver identification
- ✓ Trend investigation
- ✓ Anomaly investigation

⚡ TYPICAL IMPACT

- ✓ Faster, structured root-cause analysis
- ✓ Fewer hours chasing bad hypotheses
- ✓ Reach the real driver sooner

PURPOSE

Move from "something changed" to "here is the driver" with a repeatable investigation.

WHEN TO USE IT

Anomalies, unexpected trends, and root-cause questions from stakeholders.

BEST AI TOOLS

Claude or ChatGPT to structure hypotheses and segmentation; your warehouse to test them.

INPUTS NEEDED

The metric, the size of the change, the available dimensions, and a baseline period.

WORKFLOW SYSTEM 04 / EXPLORATION

Run this system using the AnalystEdge Workflow Framework, then save the prompt below to your reusable workflow library.

STEP-BY-STEP WORKFLOW

- 1 State the change precisely.** Name the metric, the size of the move, and the window. Vague inputs produce vague investigations.
- 2 Ask for ranked hypotheses.** Have the model rank likely drivers by probability and ease of checking.
- 3 Translate each into a query.** Turn every hypothesis into a specific segmentation you can run.
- 4 Test and eliminate.** Confirm or rule out the top hypotheses with data, not intuition.
- 5 Document the driver.** Record the cause and the evidence so the next investigation starts ahead.

COPY / PASTE PROMPT

Exploration

You are explaining a data investigation to a sharp analyst.

Situation
Revenue dropped 8% week over week.
Dimensions: region, channel, product, segment, device.

Task
Give a ranked list of likely drivers. For each, state the exact segmentation I should run to confirm or rule it out. Rank by likelihood and ease of checking.

⚠ COMMON MISTAKES

Chasing the first plausible story. Rank hypotheses and rule them out with data before you commit to an explanation.

💡 PRO TIPS

Always compare against a baseline period, not just the prior week. One week of noise can look like a trend.

🔗 ADVANCED UPGRADE

A reusable root-cause playbook with prebuilt segmentation templates for your data. This is the AnalystEdge Analysis System.

Worked example, end to end

The AnalystEdge Workflow Framework, applied step by step: define, generate, validate, build, then automate and reuse.

1

DEFINE · REVENUE DOWN 8%

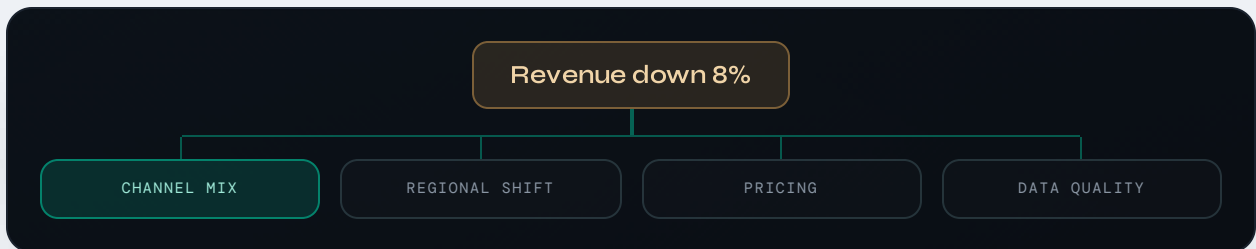
"Revenue dropped 8% week over week."

Metric: net revenue. Window: this week vs a four-week baseline. Objective: isolate the driver.

2

GENERATE · RANKED HYPOTHESES

Revenue dropped 8% WoW. Dimensions: region, channel, product, segment.
Rank the likely drivers and give the segmentation to confirm each.



3

VALIDATE · TESTING AND ELIMINATION

Ran revenue by channel against the four-week baseline, isolated the largest delta, and ruled out the other three hypotheses with data.

4

BUILD · CONFIRMED DRIVER AND RECOMMENDATION

CONFIRMED DRIVER: CHANNEL MIX

Recommendation: restore the paused campaign, monitor channel share daily

5

AUTOMATE & REUSE · SAVED INVESTIGATION PLAYBOOK

Saved as a reusable root-cause playbook with the segmentation prebuilt, so the next investigation starts ahead.

Executive Communication

A system for turning analysis into decisions: translate findings into the language executives act on, lead with the implication, and keep the supporting detail one layer down.

INCLUDED WORKFLOWS

5 WORKFLOWS

- ✓ Executive summaries
- ✓ Recommendation memos
- ✓ Decision-oriented summaries
- ✓ Stakeholder updates
- ✓ Leadership readouts

⚡ TYPICAL IMPACT

- ✓ More decision-ready summaries
- ✓ Faster executive alignment
- ✓ Reduce drafting time by 50% or more

PURPOSE

Convert correct analysis into clear, decision-ready communication.

WHEN TO USE IT

Executive summaries, stakeholder updates, and any readout for a non-technical audience.

BEST AI TOOLS

Claude for tone and concision, ChatGPT for structure. Give it the finding and the decision at stake.

INPUTS NEEDED

The finding, the decision it informs, the audience, and the supporting numbers.

WORKFLOW SYSTEM 05 / COMMUNICATION

Run this system using the AnalystEdge Workflow Framework, then save the prompt below to your reusable workflow library.

STEP-BY-STEP WORKFLOW

- 1 **Name the decision.** Identify the decision the reader must make. Everything serves that.
- 2 **Lead with the implication.** Open with the recommendation or the so-what, never the method.
- 3 **Support with two or three numbers.** Pick the few figures that carry the point. Ten numbers bury it.
- 4 **Set the tone for the audience.** Match the language to the reader. An exec wants clarity, not rigor on display.
- 5 **Keep detail one layer down.** Make the full analysis available, but do not lead with it.

```
COPY / PASTE PROMPT Communication

Rewrite this analysis for the VP of Sales.

# Rules
- Lead with the recommendation, not the method.
- One short paragraph. No statistics jargon.
- Support with at most three numbers.
- End with the decision you want them to make.

[Paste your analysis]
```

⚠ COMMON MISTAKES

Leading with methodology. Executives want the implication first; the method belongs underneath, for those who ask.

💡 PRO TIPS

Ask: if they remember one sentence, what should it be?
Open with that sentence.

🔗 ADVANCED UPGRADE

A library of audience-tuned summary templates and tone presets. This is the AnalystEdge Communication System.

Worked example, end to end

The AnalystEdge Workflow Framework, applied step by step: define, generate, validate, build, then automate and reuse.

1

DEFINE · DECISION NEEDED

"90-day retention is down for the Q2 paid-acquisition cohort."

Audience: VP of Sales. Decision: keep or pause the Q2 paid channel.

2

GENERATE · DRAFT EXECUTIVE SUMMARY

Rewrite for the VP of Sales. Lead with the recommendation. One paragraph. At most three numbers. No methodology. End with the decision.

✗ WEAK ANALYST SUMMARY

"We ran a cohort analysis and observed a statistically significant decrease in 90-day retention for the Q2 acquisition cohort relative to Q1, with a p-value below 0.05 across most segments..."

Leads with method. No recommendation. The reader has to do the thinking.

3

VALIDATE · CONFIRM SUPPORTING FIGURES

Confirmed the churn and payback figures against the cohort data before sending.

4

BUILD · FINAL EXECUTIVE MEMO

✓ EXECUTIVE-READY MEMO

Recommendation: pause the Q2 paid channel. Its customers churn 40% faster and have not repaid acquisition cost. Reallocate spend to referral, which pays back in four months.

Leads with the decision. Three numbers. Method sits one layer down.

5

AUTOMATE & REUSE · SAVED COMMUNICATION TEMPLATE

Saved as a reusable, audience-tuned summary template for the next leadership readout.

05

BONUS TOOLKIT

The Bonus Toolkit

Reusable references to keep beside you: the tools, the prompt skeleton, the mistakes to avoid, and where the system goes next.

Top AI tools for analysts

A quick reference. The workflow stays the same across tools; match the tool to the task.

TOOL	BEST FOR	WATCH FOR
ChatGPT	SQL drafts, templating, fast iteration	Verify joins and edge cases before trusting output
Claude	Long-context reasoning, narrative, explaining legacy code	Still validate every number it produces
Gemini	Research, summarizing sources, Google ecosystem	Confirm the freshness of anything it cites
Your warehouse + SQL	The source of truth for every result	AI drafts the query; the warehouse decides the answer

💡 THE RULE

Treat AI as a fast first-drafter and a second pair of eyes. The validation step is yours, every time.

Prompt framework cheat sheet

Most weak AI output comes from a weak prompt. Use this five-part skeleton, then compare the two examples below. Save the strong version as a reusable starting point.

ROLE Tell the model who it is. A role focuses the response and sets the standard.

CONTEXT Give the schema, definitions, and prior numbers. Context removes guessing.

TASK State the single thing you want, precisely. One task per prompt.

CONSTRAINTS Set the limits: dialect, length, and what it must not invent.

FORMAT Describe the exact shape of the output so you can use it immediately.

BAD PROMPT

"Show me revenue."

Why it fails: no metric definition, grain, time window, or source. The model guesses, and you inherit the guess.

GOOD PROMPT

"Show monthly net revenue by region for FY2025 using the orders table. One row per month per region. List assumptions."

Why it works: names the metric, grain, window, and source, and asks for assumptions. One correct, reusable result.

Common AI mistakes analysts make

Avoid these and you will outperform most people using the same tools.

MISTAKE	WHY IT HURTS	THE FIX
Trusting unvalidated numbers	Ships errors with confidence	Reconcile against a number you already trust
Vague prompts	Produces plausible but wrong output	State metric, grain, window, and filters
One giant prompt	Hard to debug, easy to derail	Iterate one change at a time
No schema context	The model invents columns	Paste a schema block before asking
Letting AI explain why	It invents causes	Give context, or require it to flag unknowns

THE PATTERN

Every mistake above comes from skipping a step in the framework. The system exists to stop exactly these.

The AnalystEdge System Roadmap

Volume 01 is your foundation.

The workflows in this guide solve common analyst problems today. As your workflow library grows, each system evolves into a more automated, reusable, and scalable version of itself. The roadmap below shows where the AnalystEdge methodology expands next.

- ✓ **The AnalystEdge SQL System**
Parameterized, tested query libraries that turn a monthly pull into a two-minute job.

- ✓ **The AnalystEdge Reporting System**
Scheduled pipelines that draft the narrative and route it for review.

- ✓ **The AnalystEdge Dashboard System**
A QA rubric scored automatically across every dashboard you own.

- ✓ **The AnalystEdge Analysis System**
Reusable root-cause playbooks with prebuilt segmentation.

- ✓ **The AnalystEdge Communication System**
Audience-tuned summary templates and tone presets.

THE LONG-TERM VISION

The goal is not to collect prompts. The goal is to build reusable systems. Master the workflows in this volume first. They become the foundation for every advanced AnalystEdge system that follows.



WORKFLOW STARTER SERIES · VOLUME 01

Keep building your **edge.**

WHAT'S NEXT

- 1 Use one workflow this week.
- 2 Save your first reusable asset.
- 3 Build your analyst operating system.

VISIT [ANALYSTEDGE.AI](https://analystedge.ai)

FOLLOW [ANALYSTEDGE](#)

JOIN FUTURE RELEASES