Session 2 Handout: Ask and Verify

FAST-11 AI-Assisted Analytics and Business Intelligence · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

Plain-language questions turn a spreadsheet or dashboard into a conversation. The answers come back fast and confident, and sometimes wrong: the wrong column, a hidden filter, an average of averages. The habit this session builds is simple: **every AI answer is a claim until you check it.**

Key concepts

1. Ask specific questions

Name the **measure**, the **time period**, and any **filter** or grouping.

Vague	Specific
"Which machine is worst?"	"Total scrap cost by machine, July 1 to September 30, 2026"
"Why are no-shows high?"	"No-show rate by weekday, last 26 weeks"

Ask the tool to **show the calculation** (columns, filters, aggregation). Tools: Copilot in Excel, Copilot for Power BI (Power BI Q&A retires in February 2027), Tableau AI and Pulse, ChatGPT data analysis, Gemini in Sheets.

2. Verify with pivots and formulas

- Rebuild the answer with a **pivot table**, **SUMIFS**, **COUNTIFS**, or **AVERAGEIFS**.
- Compare **row counts** and **date ranges** first.
- Record match or mismatch on W2; **resolve every mismatch** before reporting.

3. Where AI analysis goes wrong

Failure	Example	Check
Wrong column or measure	Uses quantity instead of cost	Read the calculation
Hidden filter or dropped rows	Excludes 24 blank-reason rows	Compare row counts
Average of averages	Averages monthly rates	Weight by volume
Correlation as cause	"Rose because of the new coolant"	Is the cause in the data?
Confident wording	"Most scrap is from VF-4" (41%)	Compare words with numbers

Worked example (fictional)

Copilot reported Q3 scrap cost of **$14,920**. SUMIFS gave **$16,102**. Row counts: 388 vs 412. The 24 missing rows all had a blank reason, so the AI's view had filtered them out. The correct total is $16,102; the cause goes on W2.

Checklist

- ☐ Ten questions with measure, period, and filter.
- ☐ Calculation shown for each.
- ☐ Three or more verified independently (one share, one change over time).
- ☐ Row counts and dates compared.
- ☐ Every mismatch explained.

Do and don't

Do	Don't
Verify with a different method	Ask the same question again as a "check"
Explain mismatches	Average the two numbers
Report patterns	Report causes the data can't show