Quick-Reference Card: AI-Assisted Analytics

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

Before you load

Classify the data. No customer personal information (G.L. c. 93H), PHI, or confidential financials in unapproved tools. Keep the raw file untouched.

Clean

AI **finds** problems; you **fix** with formulas or Power Query steps. Never guess blanks or delete outliers without the source. Log: step · what · rows · why · method.

Ask

Measure + period + filter. "Show the calculation." Every answer is a claim.

Verify

Pivot, SUMIFS, COUNTIFS, AVERAGEIFS. Compare row counts and date ranges. Watch: wrong column, hidden filter, average of averages, cause from correlation, confident wording. Resolve every mismatch.

Visualize

Trend: line · Compare: sorted bar · Part of whole: sparingly. Bars from zero. Labels and units. Takeaway titles. One highlight color. Check numbers against W2.

Explain

Verified numbers in; answer and action first; three points; exact figures; no unsupported "because"; uncertainty stated; decision needed.

Share

Permissions decide who sees; RLS decides which rows (Viewers only); labels classify and travel with exports. Least privilege. Show last refresh. No public links. Power BI Q&A retires Feb 2027: use Copilot, and verify.