

01

Model of a managerial AI assistant

From data to operational decision

INTRODUCTION

- 1C / CRM → Power BI → AI → Manager
- Tested on the sales department data of DUNYO CARGO
- The goal of the model is to reduce the delay between a business event and a managerial decision

The main idea: the product shortens the path from data to an operational managerial decision.

Presentation line: chaos → order → manageable order

Management model

AI-ассистента

From data to operational decision-making



02

Problem

Management decisions lag

CHAOS

- The leader does not see the situation in the moment
- Reports arrive late
- Decisions are made after the fact
- The company loses time and opportunities

Main point: management delay arises not from lack of data, but from the absence of a quick assessment of the situation.

Presentation line: chaos → order → manageable order

02 Проблема

Management decisions are delayed



Data is fragmented
and out of date



Reports from
different sources



Too many dashboards and
various analytics

That decisions are made with a
delay



03

Reason

No operational assessment of the situation

CHAOS

- Data are scattered across systems and files
- No single picture of the employee, department, division, company
- Analysis depends on manual preparation
- Risks and deviations are detected late

Main idea: the delay in management occurs not due to lack of data, but due to lack of rapid situation assessment.

03 Reason

No prompt assessment of the situation



04

Consequence

Analysis, conclusions and actions come late

TIME WASTE

- The event has already occurred
- The report is being prepared for several days
- Analysis is delayed
- Decision and action are delayed by 10+ days

The main point: management delay is not due to lack of data, but due to the lack of a quick assessment of the situation.

04 Consequence

Analysis and actions arrive late



05

Problem-solving tool

Model: 1C / CRM → Power BI → AI → Manager

STEP TO ORDER

- Data is collected into a single system
- Power BI shows the situation
- AI explains the causes and suggests actions
- The manager makes a decision here and now

Main idea: the model connects data, analytics, AI and the manager's decision into a single management loop.

Presentation line: chaos → order → controlled order

05 Solution tool

1C / CRM → Rowmeg A! Manager



1C / SEM



Power BI



A



Manager



06

How the model works

From data to outcome control

ORDER

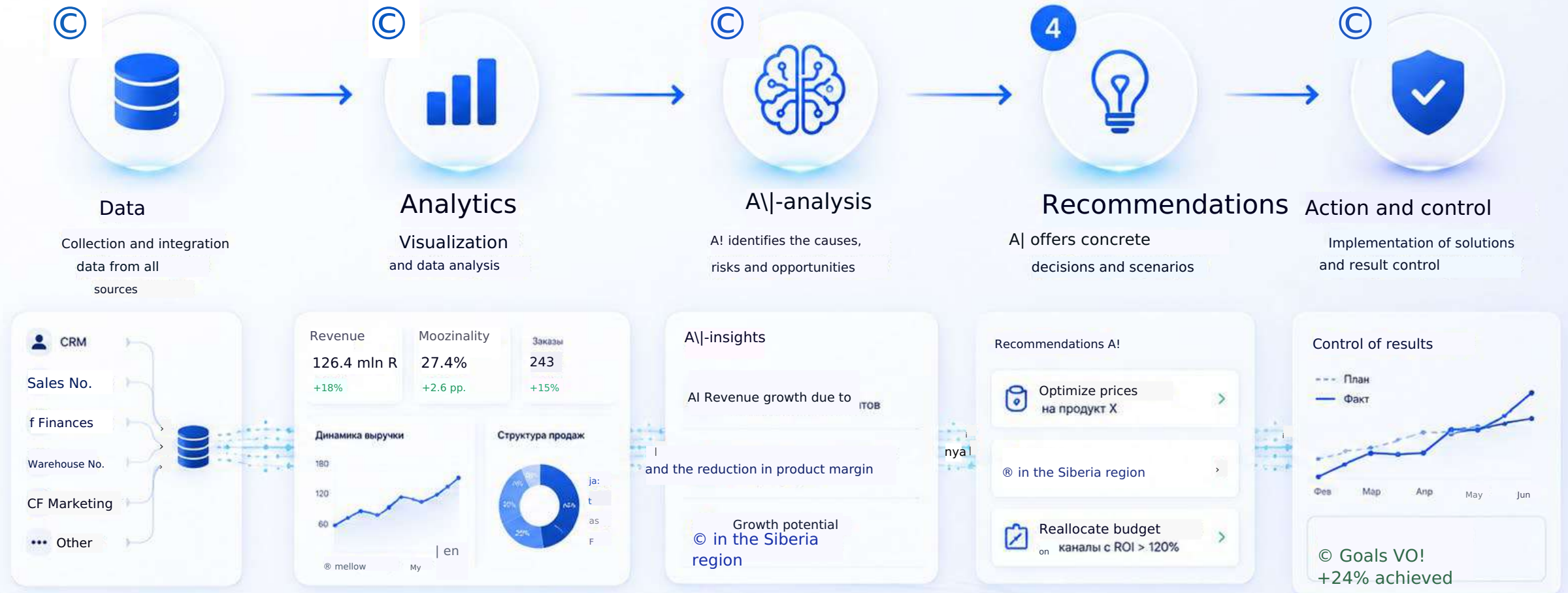
- Data are collected from sources
- Metrics are visualized
- AI analyzes causes and risks
- Recommendations are formed
- The result of the decision is monitored

Main idea: the model connects data, analytics, AI and the leader's decision into a single management loop.

Presentation line: chaos → order → controlled order

About How it works

Data — Analytics — AI — Solution — Control



07

1C / CRM

Source of operational data

DATA

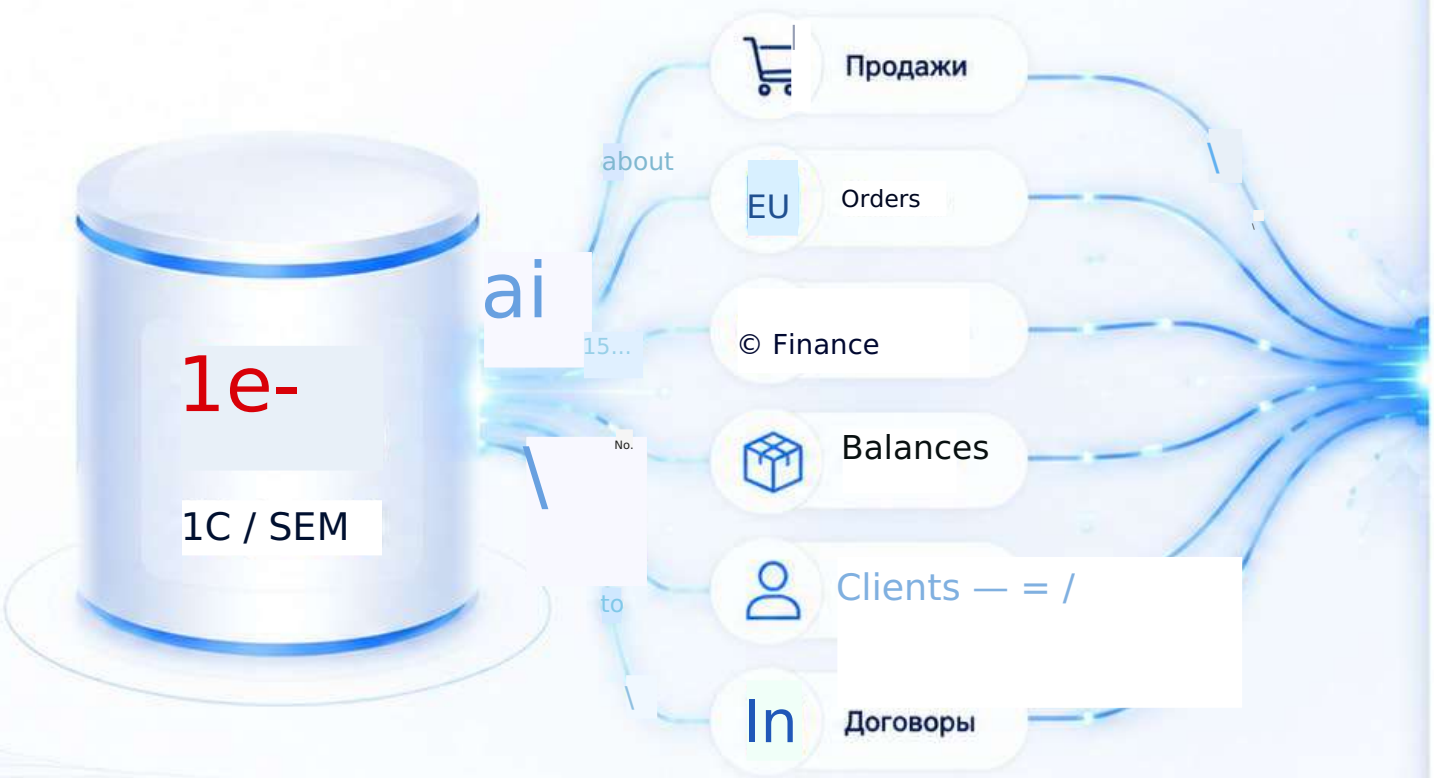
- Sales, orders, invoices
- Customers, deals, statuses
- Finance and cash flow
- Balances, expenses, contracts
- Interaction history

Main idea: the model connects data, analytics, AI and the manager's decision into one management loop.

Presentation line: chaos → order → managed order

07 1C / SEM

Source operational data





Single source of data
Structured storage







yh





RZ





Reliability



Integrity



Timeliness

08

Power BI

KPI dashboard

ANALYTICS

- Dashboards and KPI charts
- Plan-actual analysis
- Sales and profit trends
- Variances and anomalies
- Filters by periods, managers, clients

Main idea: the model connects data, analytics, AI, and leadership decision into a single management loop.

Presentation line: chaos → order → manageable order

08 Romeg V!

Situation and indicator visualization

DATA

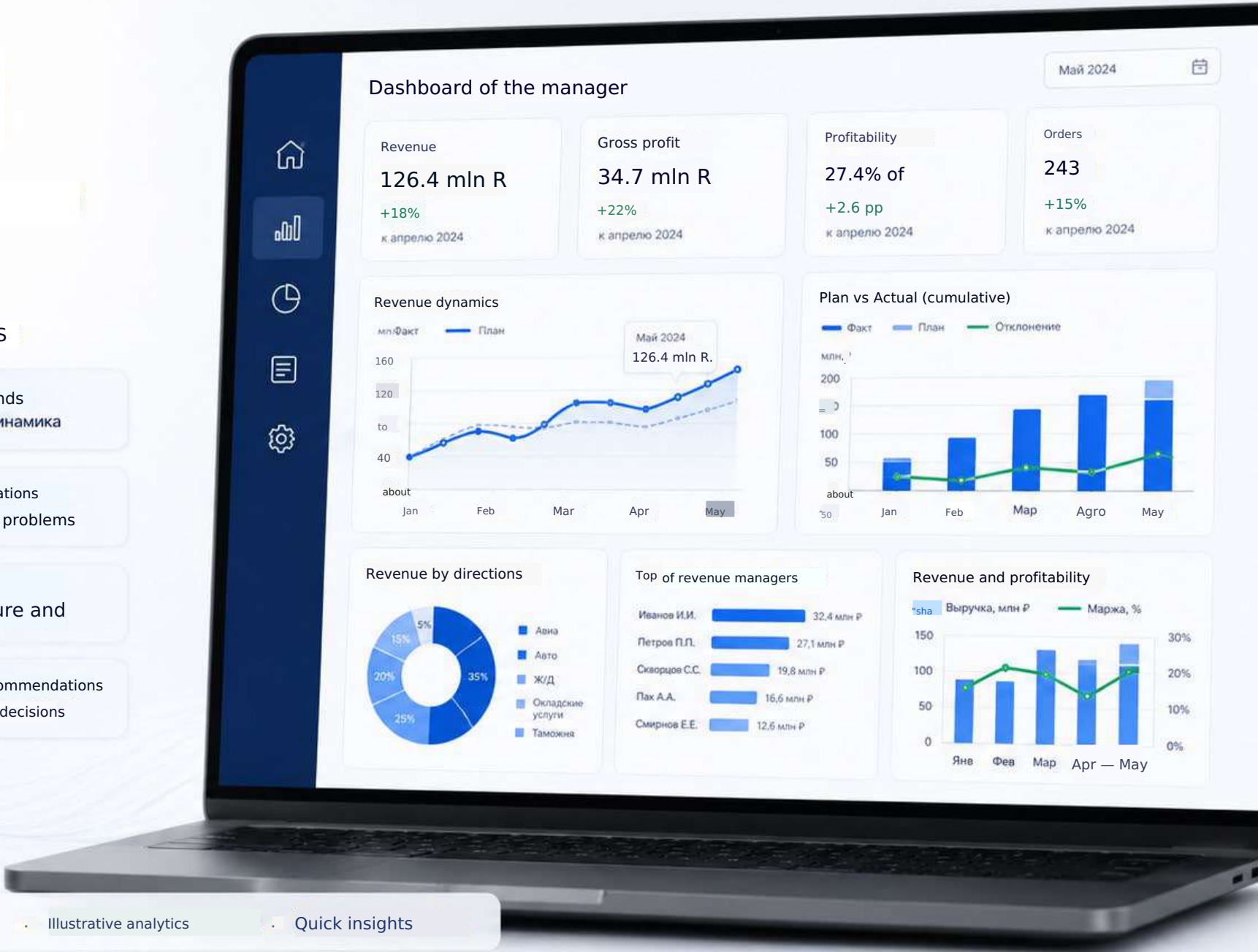


RO\MEV V!



INSIGHTS

- Trends и динамика
- Variations and problems
- © Structure and
- Recommendations and decisions



09

AI module

Analysis of causes, risks and solution options

INTELLIGENCE ANALYSIS

- Explains why indicators have changed
- Identifies problems and risks
- Makes forecasts and scenarios
- Forms recommendations
- Prepares managerial conclusions

The main idea: the model connects data, analytics, AI and the manager's decision into one management loop.

Why this is happening and what to do



10

Leader

Decision making here and now

SOLUTION

- Sees the situation without waiting for reports
- Receives preliminary analysis
- Chooses action based on facts
- Initiates adjustments immediately
- Monitors the outcome of the decision

The main idea: the model connects data, analytics, AI, and the leader's decision into one management loop.

10

Director

Принятие решения здесь и сейчас

Фокус на рост

- ✓ Стратегия
- ✓ Планирование
- ✓ Контроль
- ✓ Результат



11

24/7 Monitoring

Employee, department, division, company

MANAGEABLE ORDER

- Control at any time
- Access from anywhere
- Metrics are updated regularly
- Critical deviations are visible immediately
- Fewer blind spots in management

Key point: the manager gets not only a report but also control over the result of the decision made.

F 24/7 Monitoring

Employee, department, division, company —
at any time



Continuous control

Data and indicators are updated
in real time



Notifications and alerts Critical
events and deviations will not go
unnoticed

© Access from anywhere in the
world

Work from any device
in any place



Security and access rights Data
protected. Roles and access levels
for each task

© Full control. Lower risks. Greater confidence.



© New 3 important event
notifications

уведомления



12

Reports and analysis

For any period and in the required form

MANAGEABLE ORDER

- Day, week, month, quarter, half-year
- Report form tailored to the manager's task
- Fast comparison of periods
- Export and distribution
- Consistent data logic for all levels

Main point: the manager gets not only a report but also control of the result of the decision made.

12

О

And

3

For a day, week, month, quarter, six months



Any period

Flexible filters and date range selection in one click

Ra

Key indicators

Revenue, profit, profitability, orders, customers, and other metrics

Visual Graphs, charts, analytics

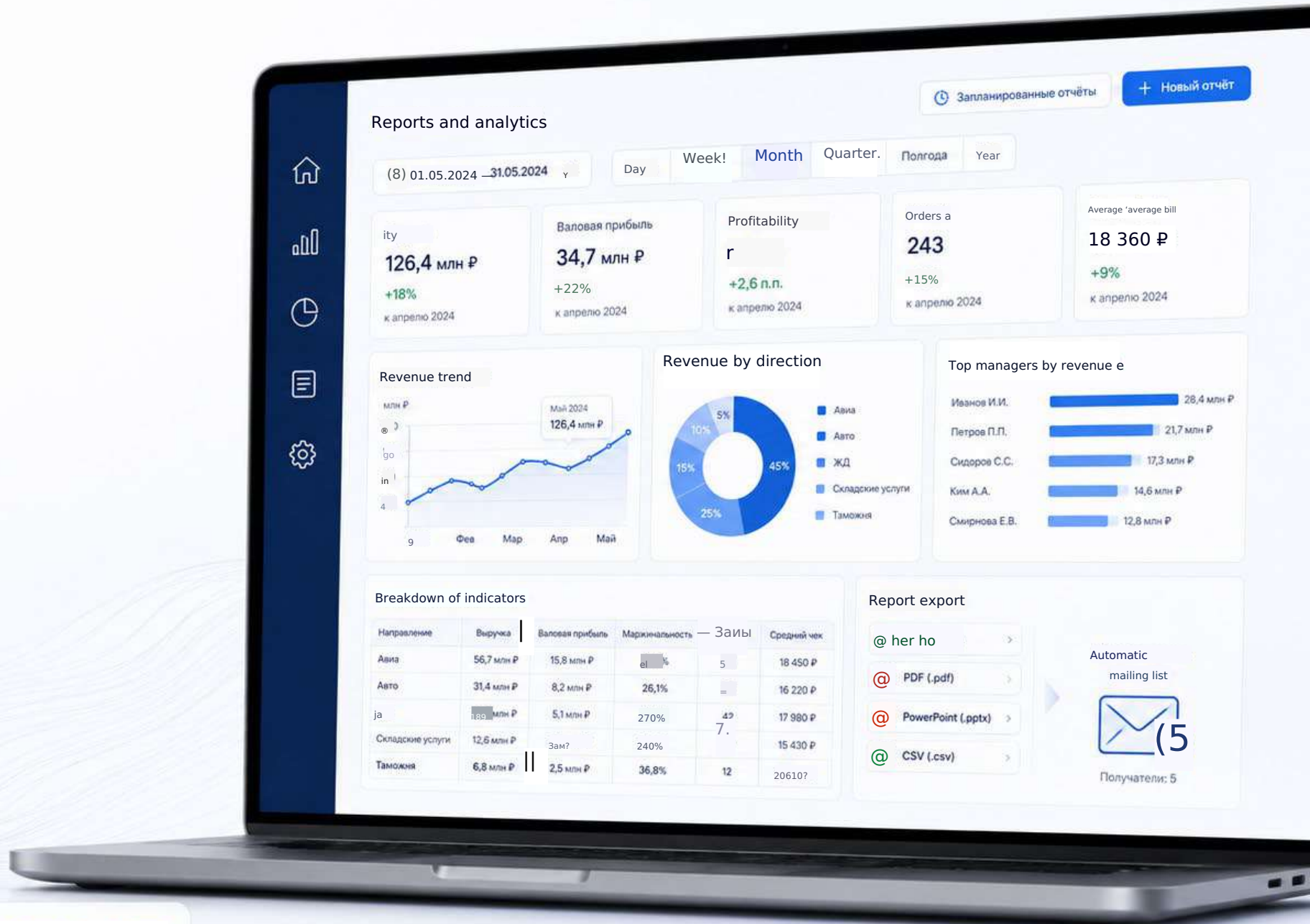
for quick understanding



Export and mailing

Excel, ROE, PowerPoint, CSV и автоматическая sending

Any reports in the required structure — fast, accurate, convenient



13

Control of the effectiveness of decisions

Verification of the result after the decision made

RESULT CONTROL

- What changed after the action
- Plan-actual by target KPIs
- Financial effect
- What worked, what didn't
- Adjustment and scaling of successful decisions

The main point: the leader receives not only a report, but also control of the result of the decision made.

13

Control of the effectiveness of decisions

Verification of the result after the decision taken



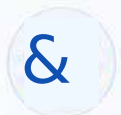
Attained effect



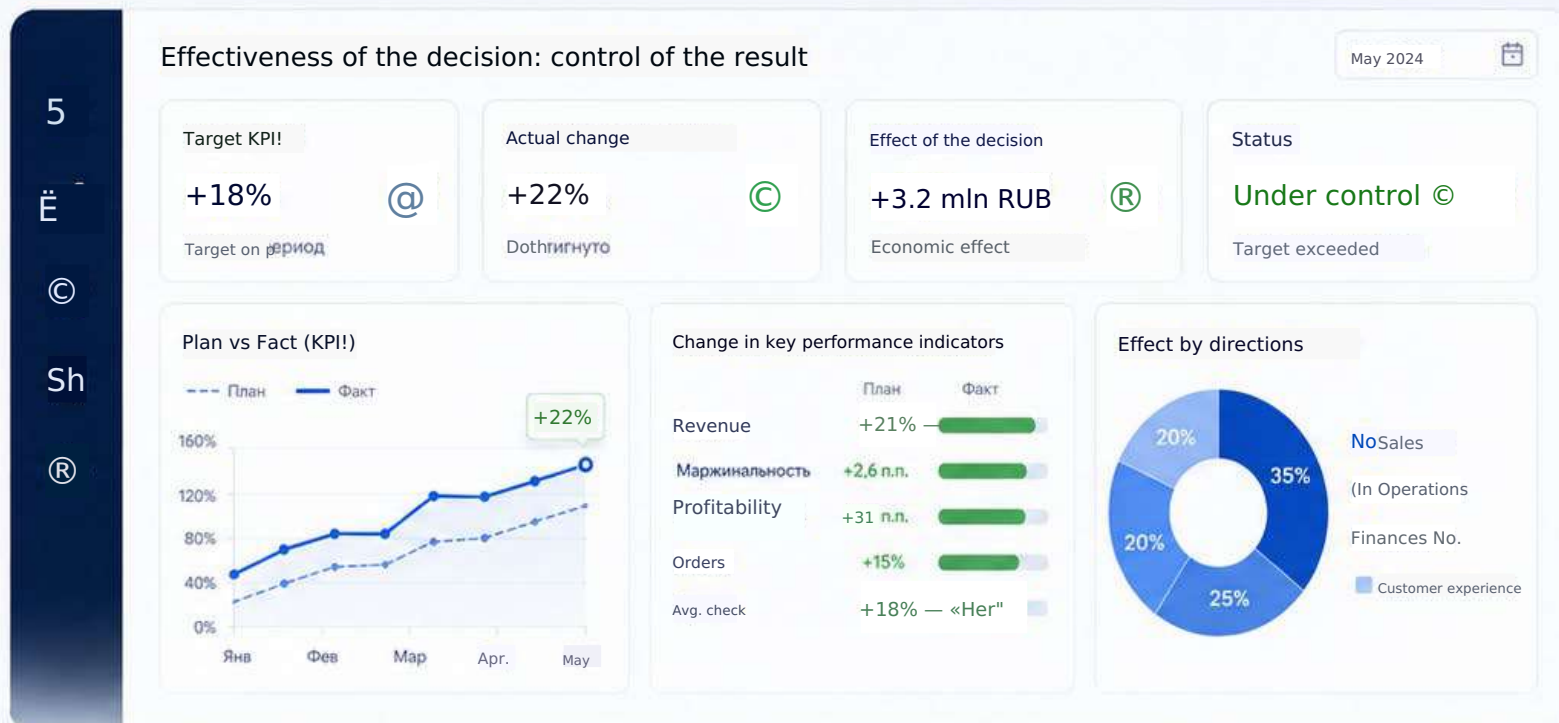
with **равниваем** plan and fact



Улучшения improvements
и **экономия** and economy



We correct actions
and **масштабируем** success



Control discipline
Each decision has
measurable result



Transparency and facts
Comparison of plan and fact
in real time



Accountability
Clear KPIs and owner
for achievement



Sustainable growth
Scale what works,
we discard the superfluous.

14

Model launch

What is needed to start

IMPLEMENTATION

- Data: 1C, CRM, Excel, reports
- Access and user permissions
- Key metrics and goals
- Responsible persons
- Regulations of work and decision making

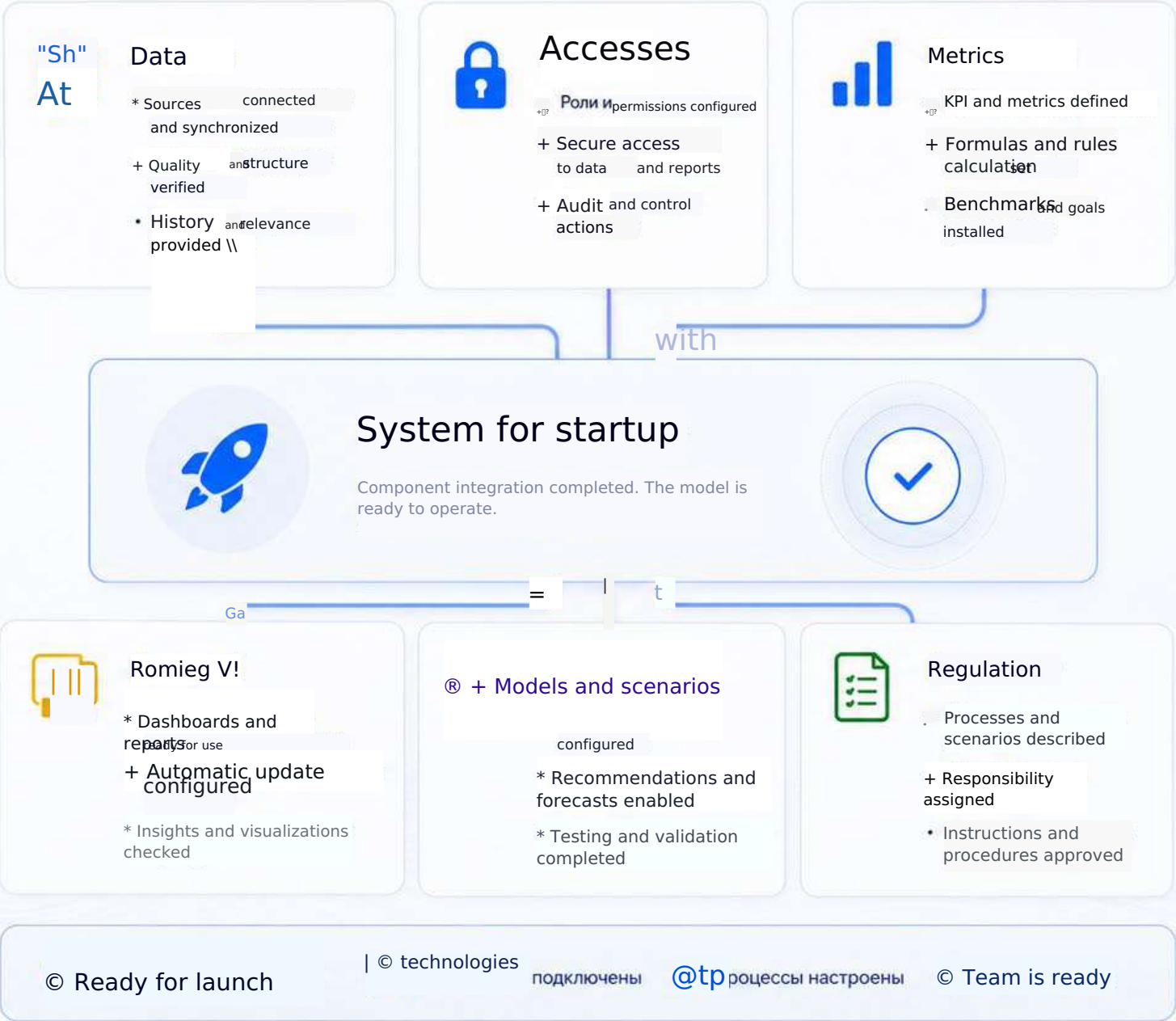
Main idea: the model can be launched in stages — first MVP, then a full system.

Presentation line: chaos → order → managed order

14 Model deployment

What to start with

All key elements
prepared — we launch the model and
move to data-driven management and AI!



15

Launch timelines

MVP: 2–4 weeks. Full version: 2–3 months

LAUNCH PLAN

- Week 1: data and goals audit
- Week 2: dashboard structure
- Week 3: AI logic and scenarios
- Week 4: testing and MVP launch
- Next: integrations, automation, and scale

Main idea: the model can be launched in stages — first MVP, then a full system.

Presentation line: chaos → order → controlled order

15 Start times

MUR: 2-4 weeks Full version: 2-3 months

We plan. We launch. We grow together.

A phased approach ensures a quick MUR rollout and sustainable system development with measurable business impact.

