



# Analyze Data

Turn a real workbook into clear findings, useful charts, and practical next steps - with the evidence and caveats attached.

## SESSION RECORDING

Watch recording • Aug 4, 2026

## ACCESS REQUIRED

ChatGPT file uploads; Work, plugins, and Sites vary by workspace

## EXPECTED OUTCOME

Evidence-backed findings, actions, and a shareable readout.

## WHAT WE COVERED

### Core concepts

- Start with the decision, then inspect the source, date range, definitions, and gaps.
- Compare shortage, excess, and count-confidence signals across product, store, and region.
- Keep data, assumptions, and recommendations separate - and add a human check before action.

### Example use cases

- Inventory review
- Budget variance
- Campaign analysis
- Customer feedback

### Tips & tricks

- Let ChatGPT explain the file first.
- Name the comparison behind each chart.
- Treat "estimated missed sales" as an estimate.
- Batch Site edits; review before sharing.

## TRY IT OUT

### Follow along with the Meridian workbook

Download the Meridian practice workbook → Attach it before opening a prompt. Every file-dependent prompt repeats [UPLOAD FILE HERE], so it works in a fresh chat. You'll inspect current stock, 14 weeks of sales, and store notes before recommending action.

### STEP 01 Orient to the workbook

Attach Meridian\_Retail\_Inventory\_Demo.xlsx. Ask ChatGPT to explain the three tabs, their date ranges, how Store ID and SKU connect them, and which definitions or count issues could mislead the analysis. Move on when you can name the decision and the checks that still need a person. Open the workbook-orientation prompt →

### STEP 02 Find and explain the signals

Look for three signals: where demand may outpace available stock, where weeks of cover suggests excess, and where confidence or store notes say to verify a count. Request a short summary, a small exception table, and two clearly labeled product-by-region charts. Keep evidence, assumptions, and estimates separate. Run the evidence prompt →

### STEP 03 Build a reviewable Site

If Sites is available, build Meridian Inventory Pulse from the real workbook. Include four KPIs, filters, the shortage and excess views, a ranked actions table, and caveats. Save a reviewable version first; batch annotation edits and check access before deploying or sharing. If Sites is unavailable, ask for a dashboard specification. Build the Site prompt →

### STEP 04 Decide, review, and communicate

Return to the evidence before acting. Ask for five practical actions labeled restock, transfer, verify, or watch, with supporting numbers and a one-sentence customer impact. Flag anything that needs a quick human check, then draft - not send - the email. Prefer spreadsheets? Repeat the same loop in the ChatGPT Excel or Sheets sidebar. Draft actions and email →

## GO FURTHER

### Extend your use case

- Pressure-test the assumptions
- Create a one-page decision brief
- Rebuild the Site from the file

### Expand to your team

- Turn it into a team playbook
- Add a human-review checklist
- Package it as a team Skill

### Additional resources

- ◇ Download practice workbook
- ◇ Data analysis in ChatGPT
- ◇ Sites guide