

Prompt Engineering Guide for Business Analysts by Metric Coders

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1. Clarify Business Goals

E.g., "Summarize Q2 sales data for executive insights in 3 bullet points."

2. Use Role Context

E.g., "Act as a market research analyst evaluating competitors."

3. Ask for Data-Driven Insights

E.g., "Highlight top 3 revenue drivers from the dataset."

4. Structure Outputs

E.g., "Provide output as a Markdown table with columns: Metric, Value."

5. Specify KPIs

E.g., "Analyze NPS trend by quarter, include growth rate."

6. Provide Examples

E.g., "Here's how past summaries looked..."

7. Segment Data Requests

E.g., "Break insights into Finance, Operations, and Sales categories."

8. Tailor for Stakeholders

E.g., "Make it executive-friendly (no jargon)."

9. Enforce Visuals

E.g., "Present results with a pie chart summary (JSON-ready)."

10. Include Benchmarks

E.g., "Compare against last year's metrics."

11. Highlight Anomalies

E.g., "Identify top 5 outliers by revenue change."

12. Validate Outputs

E.g., "Double-check totals equal 100% before final report."

13. Chain Prompts

E.g., "Draft key findings, then refine to a one-page summary."

14. Limit Scope

E.g., "Only use Q1-Q3 data, ignore projections."

15. Provide Action Items

E.g., "List 3 next steps based on findings."

16. Ask for Scenarios

E.g., "Provide optimistic, realistic, and pessimistic projections."

17. Request Comparisons

E.g., "Show differences between Product A and B in tabular form."

18. Avoid Assumptions

E.g., "If data is missing, state 'not available.'"

19. Iterate and Refine

E.g., "Make this summary 20% shorter and more visual."

20. Use Few-Shot Learning

E.g., "Here's a sample report, follow this style."

21. Request Drilldowns

E.g., "Show regional breakdown for APAC and EMEA separately."

22. Control Tone

E.g., "Make it neutral, factual, and concise."

23. Emphasize Timelines

E.g., "Highlight changes over last 12 months only."

24. Test Edge Cases

E.g., "Check what happens if dataset has 0 revenue entries."

25. Standardize Deliverables

E.g., "Always output final insights as an executive-ready PDF."