



# The Future of Data Analysis with AI Agents

Brian Piper

#EngageSummit

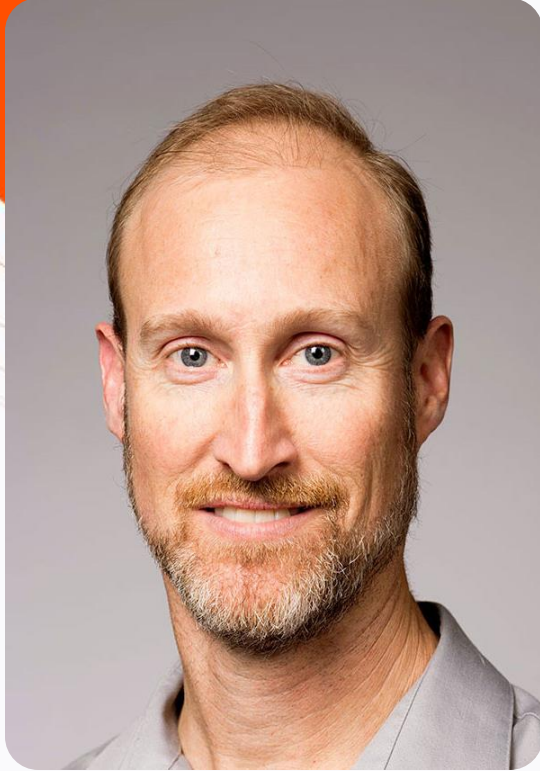






# CHANGE





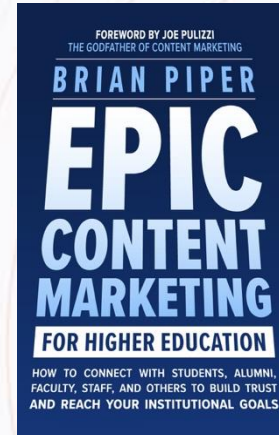
# Brian Piper

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AI Integration/  
Content Marketing  
Consultant

[getmyslides.info](https://getmyslides.info)

[brianwpiper.com](https://brianwpiper.com)



# AI Agents

“Autonomous systems that understand natural language, learn from experience, and perform tasks for users.”

- Andrew Ng

Forbes

## Unboxing The State Of AI With Andrew Ng

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Demis Hassabis is the CEO of Google DeepMind. Getty Images

“These systems will be able to plan, act, reason, and use tools.”

- Demis Hassabis



“Everything human workers do now will eventually be done by AI systems.”


- Dario Amodei

WIRED





# Levels of agency/autonomy

- Foundation models
  - Custom GPTs
  - Deep research
  - Automations
  - Chatbots
  - Autonomous agents
- 



Traditional AI  
AI Agents

Traditional analytics  
Agentic analytics





# Analytics agents

- NLP
- Real-time analysis
- Instant insights



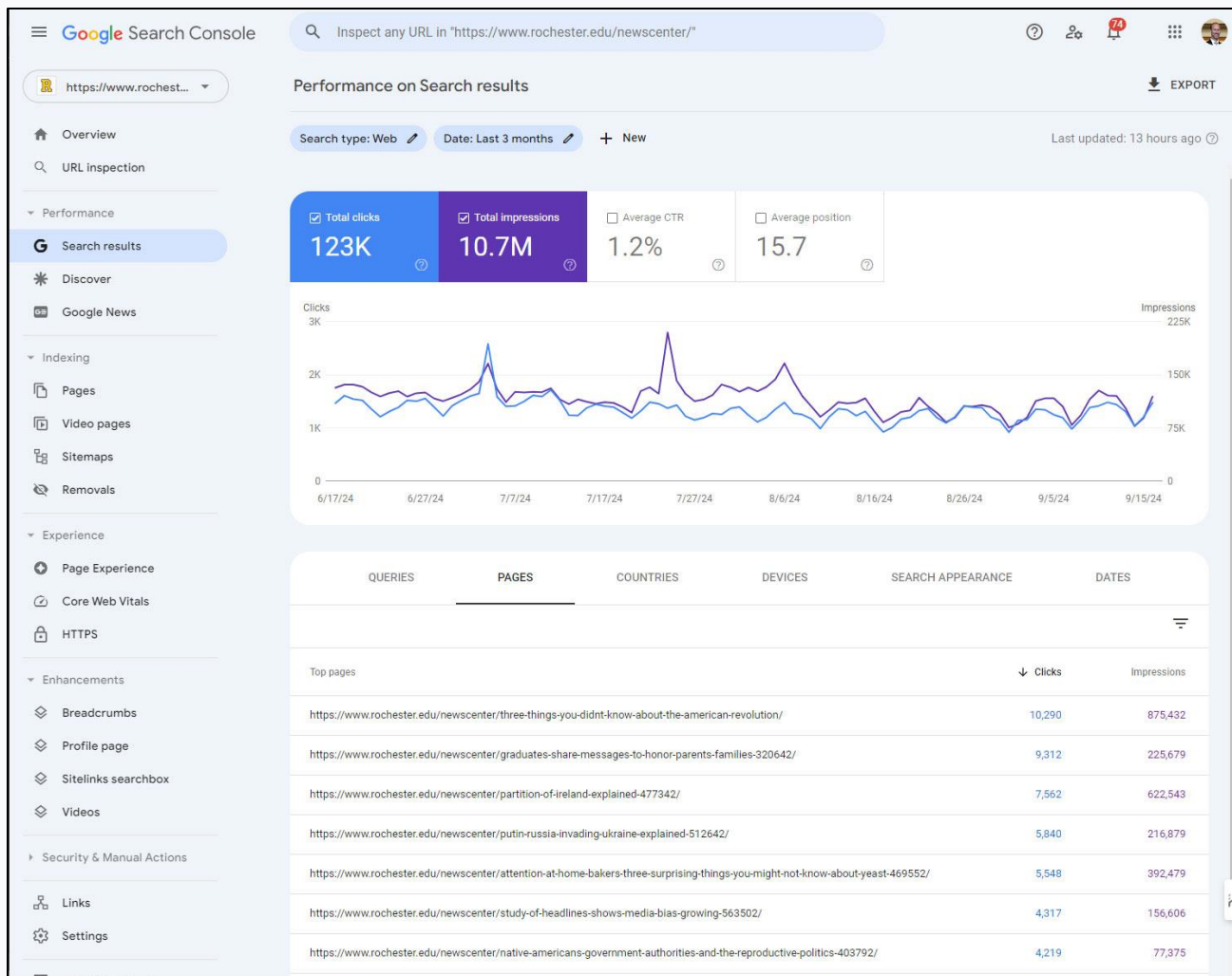
# **Content performance and optimization**

Look at your data

Let AI look at your data







Landing Page

Enter a value

Sep 19, 2023 - Sep 17, 2024

Query	Landing Page	Impressio...	Url Clic...	Average Posi...
1. why does russia want ukraine	<a href="https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/">https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/</a>	67,934	14,309	1.38
2. where does yeast come from	<a href="https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...">https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...</a>	74,072	5,015	1.11
3. what does russia want from ukraine	<a href="https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/">https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/</a>	60,612	2,798	3.47
4. why russia wants ukraine	<a href="https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/">https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/</a>	48,072	2,390	3.16
5. revolutionary war	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	302,702	1,986	4.7
6. fetal alcohol syndrome adults	<a href="https://www.rochester.edu/newscenter/fetal-alcohol-syndrome-fasd-survivors-thriving-499312/">https://www.rochester.edu/newscenter/fetal-alcohol-syndrome-fasd-survivors-thriving-499312/</a>	64,288	1,900	2.75
7. how long was the revolutionary war	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	54,200	1,893	1.21
8. why does putin want ukraine	<a href="https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/">https://www.rochester.edu/newscenter/putin-russia-invading-ukraine-explained-512642/</a>	12,555	1,748	2.06
9. when did the american revolution end	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	98,320	1,483	1.14
10. yeast	<a href="https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...">https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...</a>	131,873	1,453	9.08
11. how long did the revolutionary war last	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	36,644	1,439	1.32
12. when did the american revolution start	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	154,424	1,438	1.44
13. j1407b	<a href="https://www.rochester.edu/newscenter/gigantic-ring-system-around-j1407b/">https://www.rochester.edu/newscenter/gigantic-ring-system-around-j1407b/</a>	583,458	1,415	5.03
14. what is yeast made of	<a href="https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...">https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...</a>	45,503	1,367	2.17
15. what is yeast	<a href="https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...">https://www.rochester.edu/newscenter/attention-at-home-bakers-three-surprising-things-you-might-not-k...</a>	70,467	1,332	3.92
16. hildegard of bingen	<a href="https://www.rochester.edu/newscenter/6-things-you-didnt-know-about-saint-hildegard-of-bingen-370772/">https://www.rochester.edu/newscenter/6-things-you-didnt-know-about-saint-hildegard-of-bingen-370772/</a>	70,088	1,267	5.93
17. school choice pros and cons	<a href="https://www.rochester.edu/newscenter/what-is-school-choice-pros-and-cons-564712/">https://www.rochester.edu/newscenter/what-is-school-choice-pros-and-cons-564712/</a>	6,216	1,188	1.47
18. when did the us enter ww1	<a href="https://www.rochester.edu/newscenter/looking-back-100-years-u-s-enters-world-war-i-on-april-6-1917/">https://www.rochester.edu/newscenter/looking-back-100-years-u-s-enters-world-war-i-on-april-6-1917/</a>	90,523	1,091	2.04
19. alexei navalny	<a href="https://www.rochester.edu/newscenter/alexei-navalny-russian-soviet-opposition-movements-putin-59336...">https://www.rochester.edu/newscenter/alexei-navalny-russian-soviet-opposition-movements-putin-59336...</a>	59,521	1,079	15.27
20. when did the revolutionary war end	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	170,007	1,007	3.63
21. why did the us enter ww1	<a href="https://www.rochester.edu/newscenter/looking-back-100-years-u-s-enters-world-war-i-on-april-6-1917/">https://www.rochester.edu/newscenter/looking-back-100-years-u-s-enters-world-war-i-on-april-6-1917/</a>	112,804	953	4.66
22. facts about the american revolution	<a href="https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/">https://www.rochester.edu/newscenter/three-things-you-didnt-know-about-the-american-revolution/</a>	21,205	917	5.01
23. what is the finger test for parkinson's?	<a href="https://www.rochester.edu/newscenter/ai-test-for-parkinsons-disease-severity-566772/">https://www.rochester.edu/newscenter/ai-test-for-parkinsons-disease-severity-566772/</a>	16,381	909	3.46
24. why is ireland divided	<a href="https://www.rochester.edu/newscenter/partition-of-ireland-explained-477342/">https://www.rochester.edu/newscenter/partition-of-ireland-explained-477342/</a>	13,804	905	2.27
25. who is navalny	<a href="https://www.rochester.edu/newscenter/alexei-navalny-russian-soviet-opposition-movements-putin-59336...">https://www.rochester.edu/newscenter/alexei-navalny-russian-soviet-opposition-movements-putin-59336...</a>	16,977	851	5.7
26. perovskite	<a href="https://www.rochester.edu/newscenter/metal-perovskite-solar-cells-vs-silicon-efficiency-550212/">https://www.rochester.edu/newscenter/metal-perovskite-solar-cells-vs-silicon-efficiency-550212/</a>	81,272	835	10.83

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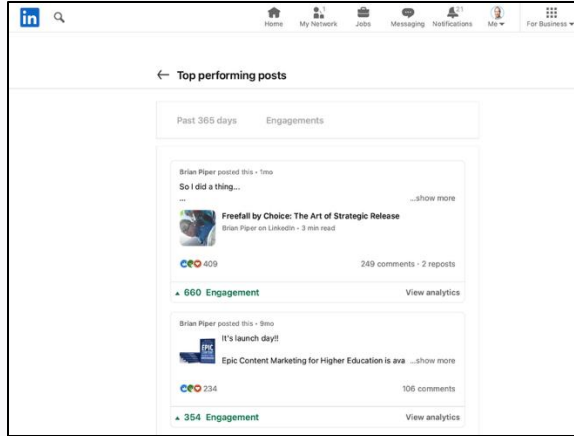
# Foundations

- Define your goals
- Determine OKRs and KPIs
- Identify metrics/data
- Collect
- Provide to AI with context
- Ask the right questions
- Validate



# Foundation models

- Export data from analytics
- Use prompt strings



You are a LinkedIn growth expert.  
I'm going to ask you to make recommendations for content that will perform well on my channel based on best practices and previous performance data.  
Before you create the response, ask any questions that will help create a better output.  
Here is information about my business [attach, link, or paste your business description and differentiator]  
and my primary audience is [insert primary audience] and my business goals are [insert goals].  
Based on the attached data from past high performing and engaging content, please come up with 20 ideas for potentially high performing content that will [trigger desired outcome] on [channel of choice]. Take your time.



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# Insights



# Deep research

- Reasoning models
- Provide detail

What are you researching?

|Get a detailed report



Research x



Sources v



Using the attached content performance data from [insert source, e.g., Google Analytics, Search Console, YouTube Studio, Meta Insights, email platform, etc.], analyze the performance of content from [insert institution or department name] on [insert platform or channel, e.g., main website, program landing pages, Instagram, YouTube, TikTok, newsletter, blog, etc.].

Begin by identifying:

Top-performing content based on [insert performance KPIs, e.g., engagement rate, conversion, views, CTR, shares, bounce rate, etc.]

Underperforming content with high potential (e.g., high impressions but low engagement)

Patterns in content topics, formats, publishing cadence, and audience behavior

Then:

Research content themes and formats used by peer institutions or benchmark brands, including [insert URLs or names of peer institutions, aspirational universities, or mission-aligned organizations]

Explore how these institutions are addressing similar audiences or topics, identifying gaps or emerging trends

Use competitive and comparative insights to uncover new or underserved content areas, missed audience intents, or under-leveraged distribution opportunities

Based on your analysis:

Recommend **specific, original content ideas and topics** that could fill identified gaps, capitalize on strengths, or align with emerging trends.

For each recommendation, note where it fits in the engagement cycle: [awareness, interest, engagement, consideration, conversion, retention, or advocacy]

Suggest **how this content could move the primary audience**—[insert audience, e.g., prospective undergraduates, working adult learners, alumni, donors, faculty, etc.]—**from one engagement stage to the next**

The primary strategic goal is to [insert outcome, e.g., increase qualified leads, improve yield, build brand awareness, grow newsletter list, increase event attendance, etc.]

✔ **Optional Add-on Instructions (if the user wants to go deeper)**

If you want the prompt to also guide users in formatting or structuring output, you could add:

Format your findings into the following sections:

**Summary of insights**

**Content gaps and missed opportunities**

**Competitive examples or models**

**Recommended topics with stage of funnel and target audience**

**Optional: Suggested formats, titles, and distribution channels**

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# Insights

# Custom GPTs

- Repeated uses
- Sequence together

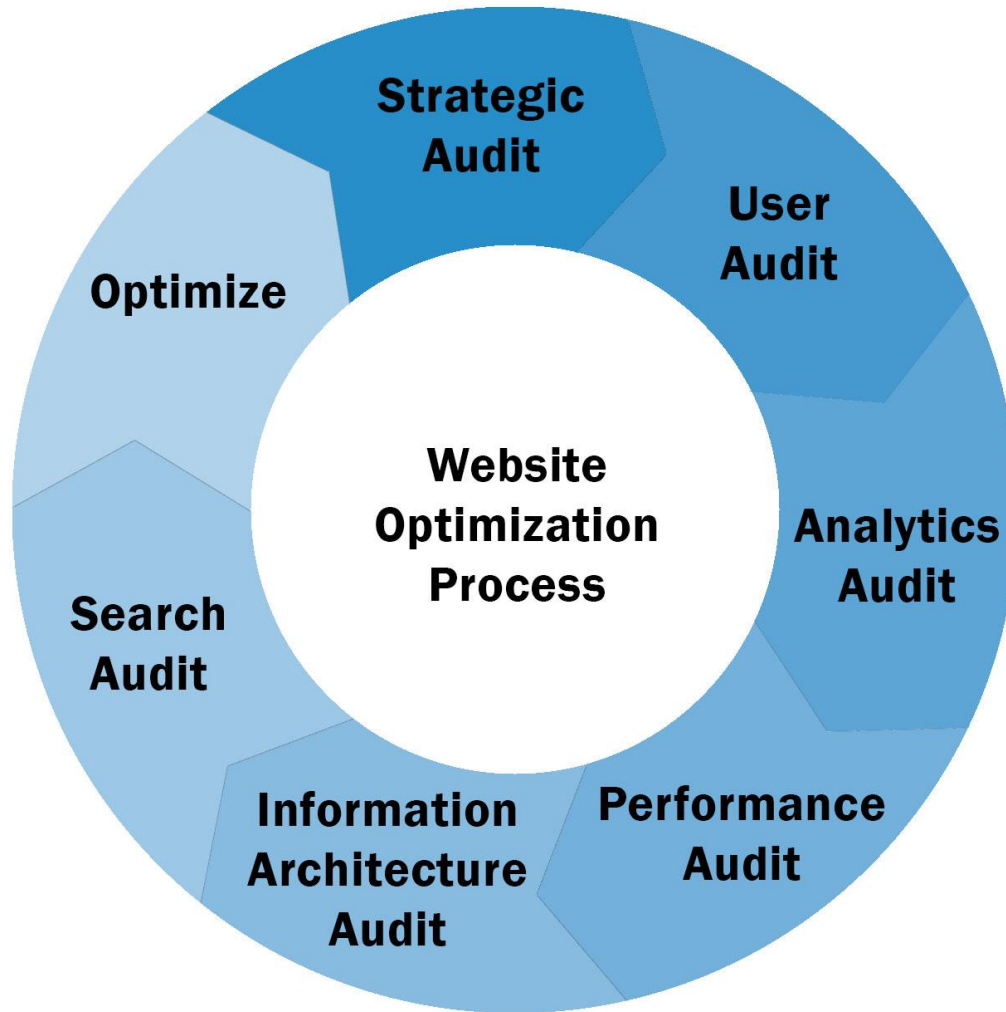
## My GPTs



### Create a GPT

Customize a version of ChatGPT for a specific purpose







# Pilots

- Content creation – 20-40% savings
- Data analysis – 60-80% savings

# Automations

- Multiple programs/browsers
- String operations



**Google Sheets** 1

Watch New Rows



**OpenAI (ChatGPT, Whisper, DALL-E)** 2

Create a Completion (Prompt) (GPT and o-series Models)



**LinkedIn** 3

Create a User Text Post

### Note

Deals with the LinkedIn data extraction using the Bright Data Web Scraper API.

The information extraction and summarization are being used to demonstrate the usage of the NBN AI capabilities.

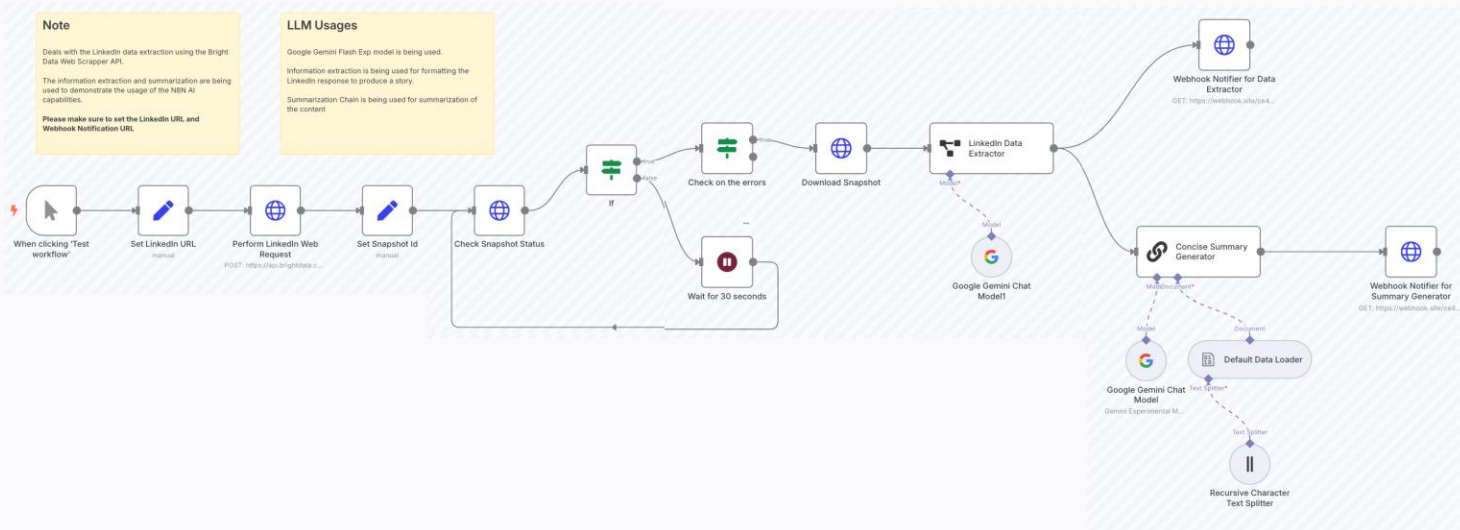
Please make sure to set the LinkedIn URL and Webhook Notification URL.

### LLM Usages

Google Gemini Flash Exp model is being used.

Information extraction is being used for formatting the LinkedIn response to produce a story.

Summarization Chain is being used for summarization of the content.





# Chatbots

- Specific data sources
- Use data to inform



#### Academic Advisor

Supports current students throughout their academic journey, detecting when they may need help and guiding them through key processes like course registration.



#### Career Advisor

Drives inquiries, boosts application starts, and fills recruiting events



#### Financial Aid Advisor

Helps prospective and current students understand financial aid and tuition at the university, surfacing key deadlines and providing support with any money-related questions



#### Common App Advisor

Monitors student progress, identifies risks, and connects them to support resources.



#### Athletics Counselor

Supports student-athletes before and after enrollment by providing clear information on the school's athletics programs and facilitating direct staff support.



#### Admission Advisor

Drives completed applications by engaging with students proactively and helping them through the process



#### Campus Life Advisor

Promotes student engagement and mental health by supporting students with key on-campus logistics like housing and scheduling, staying in close contact with students and inviting them to participate in campus life



#### Peer Advisor

Supports students with academic and personal challenges, connecting them with resources and helping them navigate the university community



#### Alumni Relations Officer

Helps students decide on their academic path based on their career plans, facilitating event attendance and staff engagement to support the student



#### Lead Gen

Prioritizes top-of-funnel goals: converting anonymous website visitors or inquiries into qualified leads



#### Recruiter

Focuses on converting inquiries or prospects to applicants. Operates in contexts like post-inquiry follow-up, event registration, or outbound outreach.



# Autonomous agents

- Multiple programs/browsers
- Decision making
- Predictive analytics

# HubSpot integration

Research completed in 6m · 17 sources

Deal Close Rates by Industry and Company Size (Q1)

## Q1 2025 Deal Close Rate Analysis

### Overview

From January through March 2025 (Q1), we analyzed all sales deals – including those **open**, **closed-won**, and **closed-lost** – across various industries and company sizes. The goal was to determine which **industry & company size segments** achieved the highest deal close (win) rates in Q1. Close rate is defined here as the percentage of deals in a segment that closed as won during this period (i.e. **# of closed-won deals / total deals** in the segment). This report presents the close rates by segment and recommends which segments to prioritize in the Prospecting Workspace based on Q1 performance.

### Close Rates by Segment (Q1 2025)

The table below summarizes the performance of each segment defined by **Industry** and **Company Size** (by number of employees). For each segment, it shows the total number of Q1 deals (including open and closed outcomes), the number of those deals that closed won, and the resulting close rate percentage.

Industry	Company Size	# of Deals (Q1)	# Closed-Won	Close Rate (%)
Financial Services	Large (~850 emp)	2	1	50%
Computer Software	Small (~125 emp)	3	2	66.7%
Management Consulting	Small (~95 emp)	1	1	100%

#### Citations

- HubSpot  
**Global Finance Corp**  
hs\_object\_source\_detail\_1: Vexed-Oxygen industry: FINANCIAL\_SERVICES numberofemployees: '850'...
- HubSpot  
**Global Finance Security Implementation**  
notes\_last\_updated: '2025-03-13T00:00:00Z'  
hs\_is\_closed\_won: 'true'...
- HubSpot  
**Global Finance Legacy System Upgrade**  
hs\_v2\_date\_entered\_current\_stage: '2025-05-13T19:46:03.812Z' closed\_lost\_reason: Chose...
- HubSpot  
**TechNova Solutions**  
hs\_num\_blockers: '0' hs\_object\_source\_detail\_1: Vexed-Oxygen industry: COMPUTER\_SOFTWARE...
- HubSpot  
**TechNova Cloud Migration**  
hs\_num\_target\_accounts: '0' hs\_all\_owner\_ids: '77523530' hs\_closed\_won\_date: '2025-01-...
- HubSpot  
**TechNova Infrastructure Upgrade**  
hs\_closed\_won\_date: '2025-02-10T00:00:00Z'  
hs\_analytics\_latest\_source\_data\_1\_contact...
- HubSpot  
**Platinum Consulting**  
hs\_num\_blockers: '0' hs\_object\_source\_detail\_1: Vexed-Oxygen industry:...
- HubSpot  
**Platinum Consulting Digital Transformation**  
hs\_is\_closed\_won: 'true'





[All Collections](#) > [Bolt AI](#) > [Bolt Agent Jobs](#) >[Advanced Strategies and Best Practices for Bolt Agent Jobs](#)

## Advanced Strategies and Best Practices for Bolt Agent Jobs

High-level guidance for teams looking to scale usage, optimize job design, and automate more of the funnel using Bolt Agent Jobs.



Written by Michael Stephenson

Updated today

### Overview

Once you're comfortable creating and managing Bolt Agent Jobs, it's time to take your strategy to the next level. This article will help you design smarter, more effective jobs that align with your institution's enrollment goals, supporting students from prospect to enrollment and beyond.

#### Overview

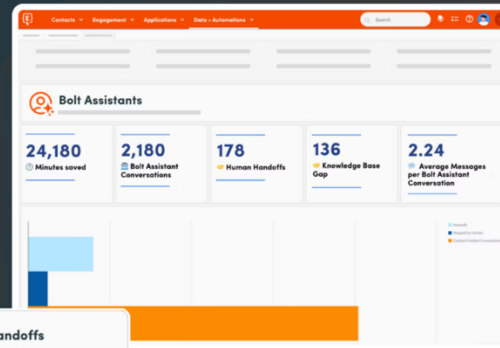
[Design Jobs Around the Funnel Stage and Goal](#)[Layer Actions Strategically](#)[Self-Approval Best Practices](#)[Segment and Trigger Strategy](#)[Deadlines and Urgency](#)[Writing Strong Instructions](#)

# 10 Must-Use AI-Driven Dashboards for Enrollment & Admissions



by Erin Fields · Updated Sep 06, 2024



## 10 Must-Use *AI Driven Dashboards* for Enrollment and Admissions



- Handoffs
- Stopped by Contact
- Assistant Finished

# Scale analytics

- Export from analytics
- Use prompt chains
- Build custom GPTs
- Automate
- Monitor AI landscape

- 
- Change our processes
  - Change our workflows
  - Change our jobs
- 

# Jobs GPT



# JobsGPT by SmarterX.ai

By smarterx.ai  

Prioritize AI uses by breaking jobs down into a series of tasks.  
Prepare for the future of work by assessing the exposure levels of  
jobs to smarter, more generally capable AI models. Forecast potential  
new jobs AI could create by industry, profession or college major.  
(v2.0 beta)

Enter a job title.

Submit a  
job description.

Forecast new jobs.



## **Traditional Role**

Data Analyst (Full-time)





## **Future Role**

Strategic Insights Manager + AI Agent Team



## **Result**

Higher-level strategic thinking, faster execution, better outcomes

- 
- Change our processes
  - Change our workflows
  - Change our jobs
  - Change our audiences
- 



84% treated like a person

76% expect data ethics

A decorative orange graphic on the left side of the slide, consisting of several curved lines and a thick, solid orange shape that resembles a stylized 'E' or a bracket.

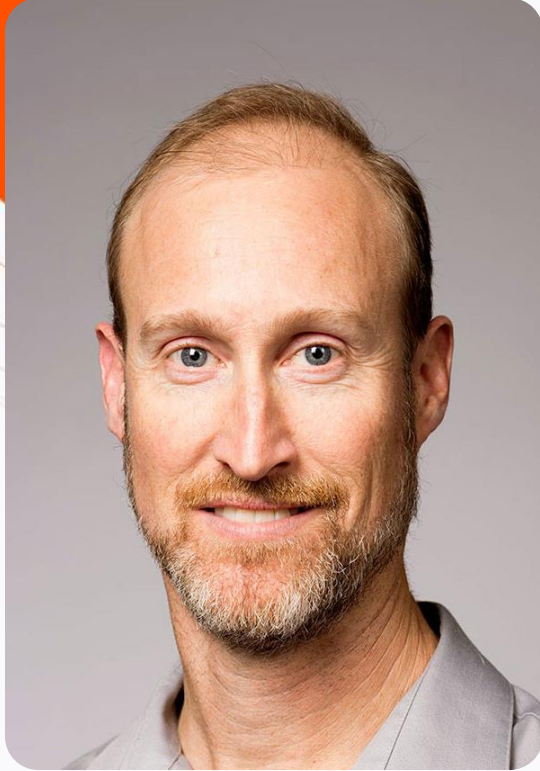
## Students

- 52% more likely to apply
- 77% would like to use an AI agent

## Preparing for the future

- Build AI fluency
- Scale data analysis
- Establish data/content governance
- Create phased implementation strategy





# Brian Piper

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Content Marketing  
Consultant

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