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Revenue Narration Agent

Complete

Output Completed

Monthly Revenue Performance - 2025

Group	Current Quarter	Last Year	Last Quarter	YTD %	YTD \$	QO %	QO \$	YTD FY24	YTD FY23	YTD \$
Aerospace Tech	320	300	310	7	20	3	10	320	300	20
Mobile Systems	550	530	560	4	20	-2	-10	550	530	20
Consumer Devices	180	210	220	-14	-30	-18	-40	180	210	-30
Web Infrastructure	210	205	215	2	5	-2	-5	210	205	5
Diagnostics	125	115	120	9	10	4	5	125	115	10
North America Ops	130	110	140	18	20	-7	-10	130	110	20
Cybersecurity Solutions	140	120	125	17	20	12	15	140	120	20
Tech Group Total	900	850	890	6	50	1	10	900	850	50
Automotive Tech	120	130	130	-8	-10	-8	-10	120	130	-10
Electronic Instruments	140	135	135	4	5	4	5	140	135	5
Chipset Testing	100	95	90	5	5	11	10	100	95	5
Smart Integration Services	50	60	55	-17	-10	-9	-5	50	60	-10
Wireless Testing Solutions	10	12	9	-17	-2	11	1	10	12	-2
Instrumentation Total	420	432	419	-3	-12	0	1	420	432	-12
Americas	560	520	530	8	40	6	30	560	520	40
APAC	230	225	220	2	5	5	10	230	225	5
EMEA	250	260	275	-4	-10	-9	-25	250	260	-10
Japan	240	250	255	-4	-10	-6	-15	240	250	-10
Global Tech Corp Total	1300	1255	1280	4	45	2	20	1300	1255	45

Output

Total Revenue

\$1,300M

Accelerating

Top Performer

North America Ops

\$130M

Risk Area

Consumer Devices

\$180M

Key Opportunity

Cybersecurity Solutions

\$140M

Revenue Performance (FY23-FY24)

DIVISION	REVENUE (FY24)	GROWTH	TREND
Tech Group	\$900M	+6%	Accelerating
Instrumentation Total	\$420M	-3%	Stabilizing
Americas	\$560M	+8%	Accelerating

Segment Details

SEGMENT	REVENUE (FY24)	GROWTH	STATUS
Aerospace Tech	\$320M	+7%	Accelerating
Mobile Systems	\$550M	+4%	Accelerating
Consumer Devices	\$180M	-14%	Risk

Key Decision Insights

1. The total revenue for Global Tech Corp increased from \$1,255M in FY23 to \$1,300M in FY24, marking a 4% growth. This reflects a stable, positive trajectory across the fiscal year.

2. Aerospace tech, cybersecurity solutions, and north america ops showed strong growth, consumer devices and wireless testing solutions showed notable declines.

Agent Activity

Catch Webhook

Trigger Input

PDF to Images

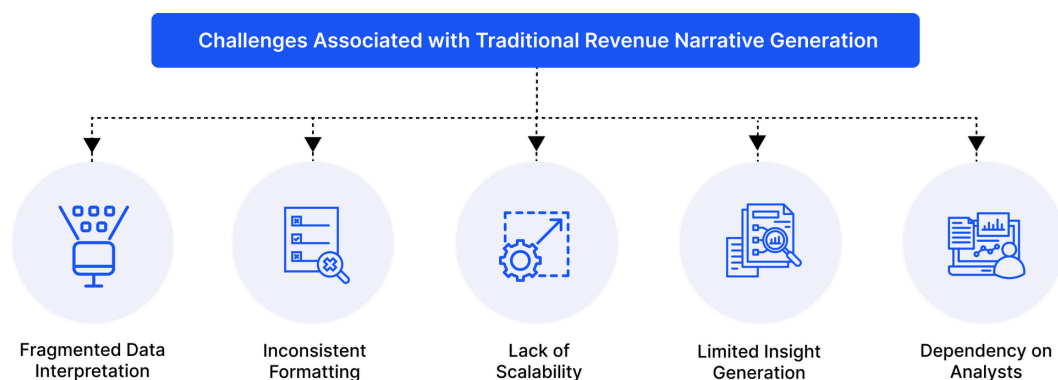
Revenue Narration Agent

Solution Document

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Problem Statement

As revenue data becomes increasingly multi-dimensional and time-sensitive, organizations face growing challenges in delivering accurate, narrative-rich financial insights. Modern finance teams struggle to convert raw revenue tables, often extracted from financial systems, into clear, boardroom-ready narratives. Manually drafting multi-year performance summaries is time-consuming, error-prone, and inconsistent, especially when identifying growth trends, seasonal patterns, or segment-specific drivers. Traditional BI tools lack the contextual intelligence to infer strategic insights or validate narrative structure. Manual processes often overlook anomalies or inconsistent formatting, making narratives unreliable. They also lack scalability across business units and require repeated back-and-forth with analysts to refine insights. These workflows also depend heavily on a few key personnel with domain knowledge, increasing risk and limiting continuity. As reporting cycles compress and data complexity grows, CFOs and strategy heads need an automated way to generate accurate, executive-style summaries that reflect revenue progression and forecast outlooks. Without such automation, financial storytelling remains a bottleneck in decision-making.

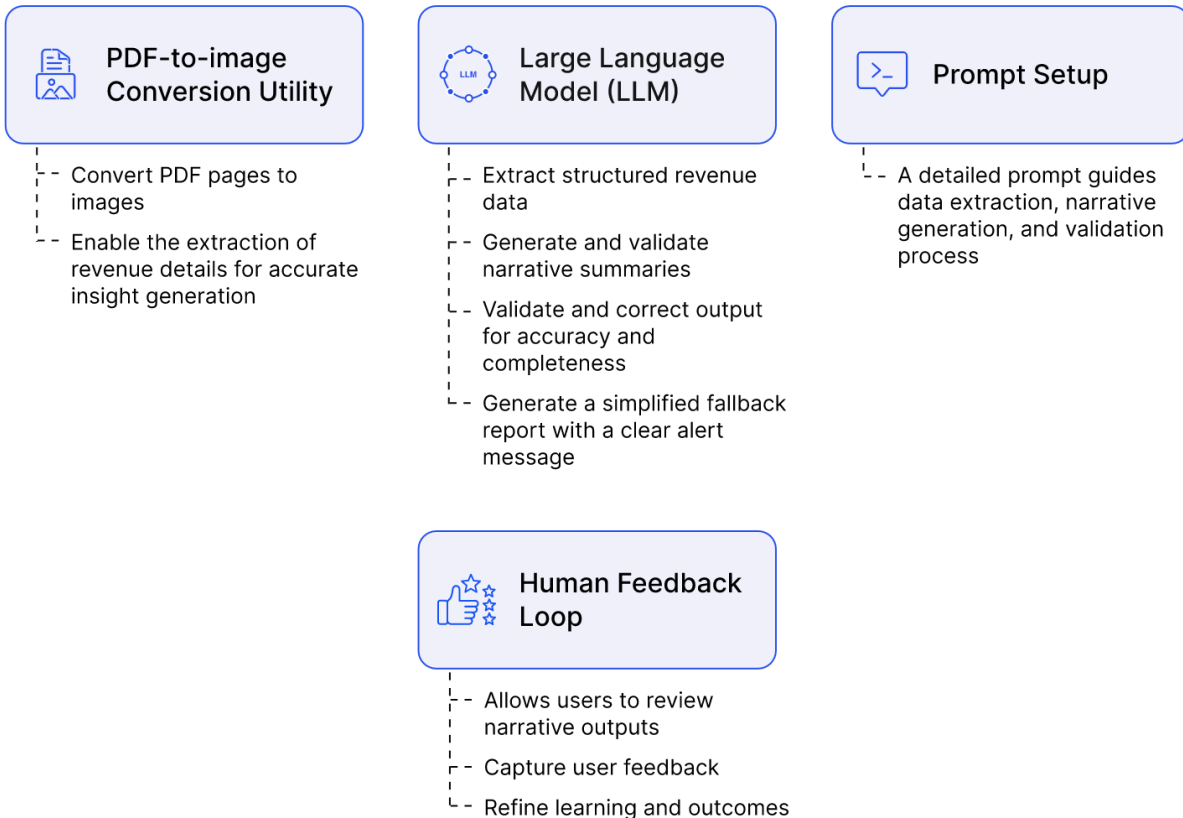



Solution Statement

ZBrain revenue narration agent transforms raw financial tables into structured, boardroom-ready narratives tailored for executive consumption. Leveraging a Large Language Model (LLM), it processes revenue data extracted from PDF files, validates it, and generates multi-year summaries with segment-level trends, seasonality patterns, and forecast outlooks. Based on consistent year-over-year logic, the agent automatically classifies performance using tagged insights such as Accelerating, Decelerating or Risk. Each narrative report includes decision insight sections, ranging from executive summary to investment focus, delivering structured, data-grounded observations without speculative interpretation. An LLM-driven validation layer enforces structural compliance, formatting consistency and integrity. If structural issues are detected, the agent routes content through a fallback review to rectify the issue and maintain output quality. The final output is consistently formatted, allowing CFOs and finance leaders to access timely, accurate, and context-rich revenue reports without manual drafting or cross-functional rework. This enables faster reporting cycles, reduces dependency on analysts, and ensures consistency in executive communication.

Agent Setup

ZBrain revenue narration agent comprises the following components to automate the financial narrative and insight generation from complex, multidimensional revenue data.



1. PDF-to-image Conversion

- The PDF-to-image conversion utility converts PDF pages into an image format. This facilitates the extraction of revenue details from images, enhancing the accuracy of subsequent revenue insight generation.

2. Large Language Model (LLM)

- The agent uses an LLM to extract structured revenue data, generate narrative summaries, and validate outputs for structural accuracy, formatting compliance, and content completeness. If validation fails, the LLM automatically rectifies the issues and regenerates the narrative in the required format.

| Agent Setup

3. Prompt Setup

- Comprehensive prompts guide the LLM through each stage, data extraction, narrative generation, and validation, ensuring outputs remain contextual, consistent, and executive-ready.

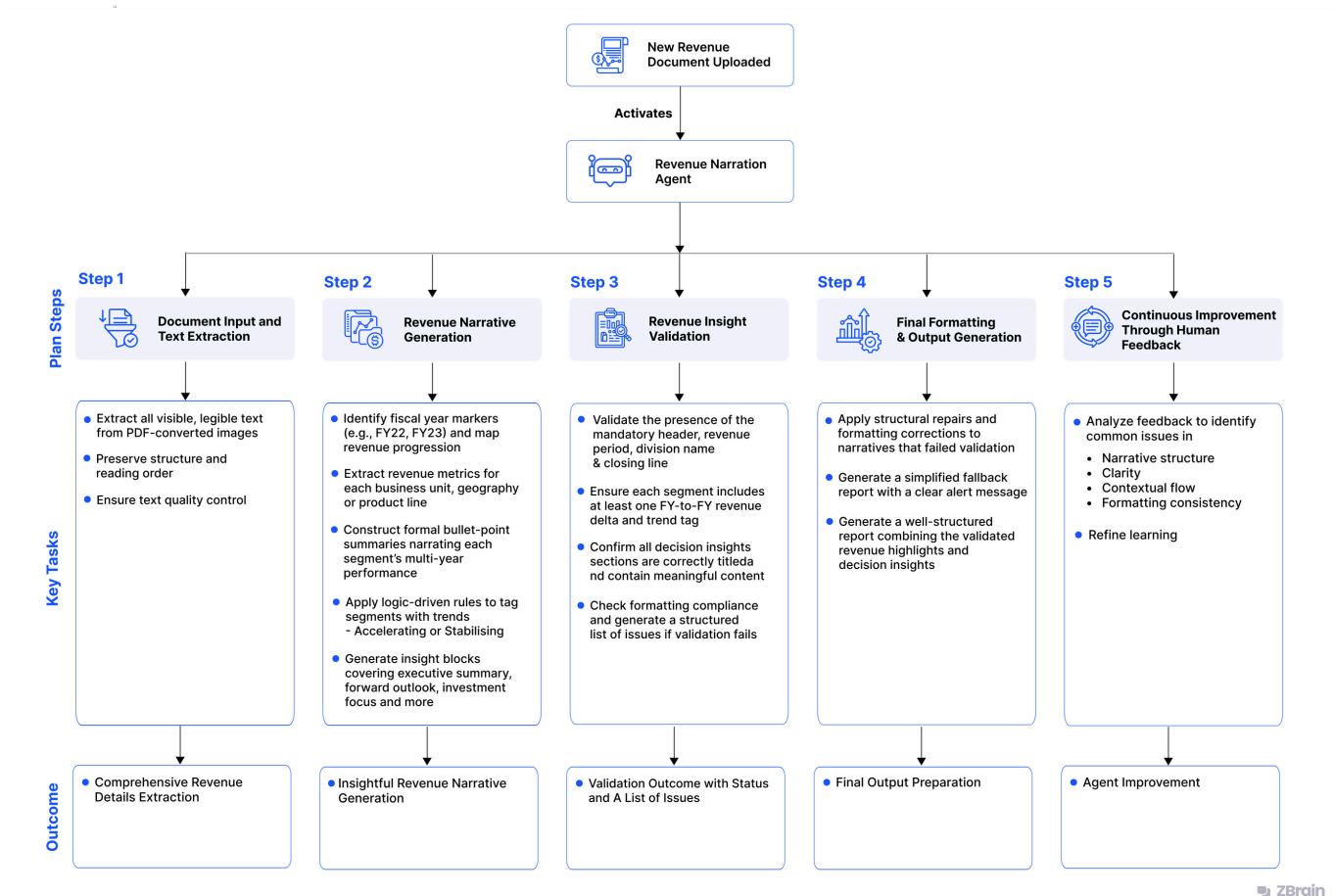
4. Human Feedback Loop

- Integrates user feedback after narrative delivery to continuously enhance the clarity, accuracy, and executive readiness of revenue insights, ensuring alignment with evolving reporting standards.

This structured setup ensures that the ZBrain revenue narration agent reliably transforms complex financial data into executive-ready insights, reducing manual workload, improving reporting speed, and ensuring consistency at scale.

How The Agent Works

ZBrain revenue narration agent is designed to automate the generation of executive-level narratives from structured revenue data. Leveraging an LLM, it analyzes multi-year revenue tables, identifies key performance patterns, and produces detailed, structured summaries aligned with boardroom reporting standards. Below is a breakdown of the agent's end-to-end workflow:



| How The Agent Works

Step 1: Document Input and Text Extraction

The agent begins by processing the uploaded financial document to prepare it for a structured narrative generation.

Key Tasks:

- **PDF-to-image Conversion:** Each page of the submitted PDF is converted into an image to enable accurate and reliable text extraction using multimodal capabilities.
- **Multimodal Text Extraction:** Utilizes an LLM to extract all visible, legible text from each image, preserving structure and reading order. A looping mechanism ensures every page is processed without any omissions.
- **Text Quality Control:** Ignores non-textual content, excludes unreadable fragments, and ensures only structurally intact text is stored.

Outcome:

Comprehensive Revenue Details Extraction: All relevant revenue text is extracted and organized into a clean, structured format ready for narration.

Step 2: Revenue Narrative Generation

This step transforms structured revenue tables into data-grounded, CFO-style summaries using an LLM.

Key Tasks:

- **Fiscal Year Interpretation:** An LLM identifies fiscal year markers (e.g., FY22, FY23, FY24) and maps revenue progression across each period for every segment.
- **Segment Level Analysis:** Extracts revenue metrics for each business unit, geography, or product line, calculating YoY and QoQ deltas to detect growth, decline, or stability.
- **Narrative Construction:** An LLM constructs formal bullet-point summaries narrating each segment's multi-year performance. Based on revenue progression rules, the agent applies appropriate trend tags such as Accelerating, Decelerating, Stabilising, Opportunity, or Risk to highlight observed patterns across fiscal periods.
- **Trend Detection and Classification:** Applies logic-driven rules to tag segments with trends like Accelerating (3+ YoY increases) or Stabilising ($\pm 2\%$ variance across periods).
- **Decision Insight Generation:** An LLM generates eight distinct insight blocks: executive summary, quarterly trends & seasonality, forward outlook, and investment focus, strictly grounded in revenue data.

Outcome:

Insightful Revenue Narrative Generation: A complete, executive-ready narrative is generated by an LLM, highlighting patterns, trends, and forecast-aligned performance.

| How The Agent Works

Step 3: Revenue Insight Validation

The agent performs structural and formatting validation using an LLM to ensure narrative readiness for stakeholder consumption.

Key Tasks:

- **Structural Completeness Check:** An LLM validates the presence of the mandatory header, revenue period, division name, and closing line.
- **Segment Narrative Verification:** Ensures each segment includes at least one FY-to-FY revenue delta and an appropriate trend tag.
- **Insight Block Validation:** Confirms that all eight decision insights sections are present, correctly titled, and contain meaningful content.
- **Output Compliance Assessment:** Checks for adherence to formatting rules (e.g., line breaks, bullet usage, and static layout), returning a status flag—"Validation Passed" if successful, or a structured list of issues if validation fails.

Outcome:

Validation Outcome: Only narratives that pass all structural and formatting checks proceed to output. Narratives with errors are flagged for correction.

Step 4: Final Formatting and Output Generation

In this step, the validated narratives are either routed to the final output or sent for correction based on the results of the validation check.

Key Tasks:

- **Validated Output Delivery:** Narratives that pass validation are stored and routed to the agent dashboard or API endpoints for end-user access.
- **Fallback Correction Handling:** Narratives failing validation are processed using an LLM call configured to perform structural repair and formatting correction based on the flagged issues.
- **Fallback Report Generation:** If the narrative cannot be structurally corrected, the LLM generates a simplified fallback report with a clear alert message, ensuring the output remains usable while indicating that full formatting cannot be applied.
- **Presentation-Ready Formatting:** An LLM combines the validated revenue highlights and decision insights sections into a single, well-structured report. Ensures the final output follows plain-text formatting standards, consistent section ordering, proper spacing, and no markdown or collapsible elements.

Outcome:

Final Output Preparation: Only compliant, well-formatted narratives are delivered to stakeholders, ensuring readiness for executive use and consistent reporting quality.

| How The Agent Works

Step 5: Continuous Improvement Through Human Feedback

The agent incorporates user feedback to improve the quality, clarity, and consistency of generated revenue narratives.

Key Tasks:

- **Feedback Collection:** Enables users to review narrative output and flag issues related to clarity, relevance, accuracy, formatting, or structural completeness.
- **Feedback Analysis and Learning:** The agent analyzes feedback to identify common issues in narrative structure, clarity, contextual flow, formatting consistency, and overall readability, guiding ongoing improvements in output quality.

Outcome:

Agent Refinement: User feedback informs ongoing improvements, helping enhance narrative clarity, structural consistency, and overall alignment with executive reporting standards.

| Key Benefits



Executive-ready Narratives at Scale

Automates converting complex revenue tables into structured, C-suite-level insights, reducing manual drafting delays



Improved Decision-Making

Provides data-validated narratives with clear segment trends and futuristic insights, enabling timely, informed strategic discussions.



Increased Efficiency

Frees finance teams from repetitive analysis and formatting tasks, allowing them to focus on high-value activities.



Consistent Communication Standards

Enforces standardized narrative formats and tone, ensuring consistency across business units and reporting cycles.



Scalability

Handles multi-year, multi-division datasets without performance loss, making it ideal for enterprise-scale financial reporting.

| Conclusion

ZBrain revenue narration agent redefines how finance teams communicate performance by automating the transformation of complex revenue data into structured, decision-ready narratives. The agent eliminates manual interpretation and formatting efforts by delivering validated, segment-wise insights with trend classification and forecast outlook. Its ability to scale across business units and time periods while maintaining consistency and accuracy makes it a powerful asset for CFOs and strategy leaders. It accelerates reporting cycles and enhances executive decision-making. This agent offers a strategic, high-impact solution for any organization looking to streamline financial storytelling and elevate boardroom reporting.