Mini-Series Recap

Session 1:
Visualizing Success

Transforming Data Into Insight

Dashboards that replace spreadsheet fatigue

Tariffs & market trends made instantly clear

Show impact in **seconds**, not pages

Session 2:
Training Reps to Capture Better Data

Better Input = Better Decisions

Rep-friendly workflows that actually get used

Streamlined manufacturer Excel inputs

CRM/ERP data you can finally trust

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What is BBB Techs?

Your Partner for Forecasting, Planning & Data-Driven Growth

Data Automation & Workflow Optimization

Power automate, business process automation, approvals, pipelines

Power BI Dashboards & Reporting Solutions

KPI dashboards, scorecards, sales reporting, manufacturer reports

ETL, Data Modeling & Fabric Engineering

Dataflows, pipelines, transformations, modeling best practices

Trusted Partners: Microsoft & Lenovo

Cloud solutions, device management, enterprise hardware

Microsoft 365 Migrations & Solutions

Email / file migrations, Teams, security & governance, training

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Agenda

Why Forecasting Matters Now

Core Forecasting Tool

How AI & Copilot Help You Forecast Faster

Using Copilot to Aid in Forecasting and Insights

Live AI Demo: Copilot in Excel, Fabric and Forecasting Dashboard

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Meet the Speaker

Timothy Blake
CEO & Founder
of BBB Techs

Proven Experience in Data & Forecasting

Microsoft & AI Technology Specialist

Started at the Helpdesk – Built a Career on Insight

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Why Forecasting Matters Now

The Market Moves Faster Than Ever

*Real-time markets require real-time forecasting*

Tariffs, shifts in demand, and supply chain swings change faster than static reports can keep up.

Manufacturers Want What's Next

Principals want reps who forecast, not just report

Walking into a line review with predictions instead of past data builds trust and influence.

Protecting Commission Revenue

Spot risk before it becomes lost income

Forecasting helps identify declining lines, weak territories, and seasonal dips early.

Better Decisions with Less Guesswork

Move from gut feeling → data clarity

Reps make stronger decisions when they can see what's likely to happen next.

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Core Forecasting Tools
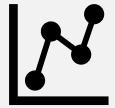
Data & Analytics

- Power BI, Tableau, Looker
- Snowflake, BigQuery
- Fivetran, Matillion

CRM/ERP Systems

- Salesforce, Hubspot, D365
- P21, SAP, NetSuite
- Repfabric, dynaMACS, Rev Software Solution

AI & Predictive

- ChatGPT + AI assistants
- Machine learning platforms (Azure ML, DataRobot

Everyday Planning

- Excel / Google Sheets
- Territory mapping tools (Mapline, eSpatial)
- Collaboration (Notion, Teams, Slack)

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How AI & Copilot Help You Forecast Faster

Turn messy spreadsheets into clear insights - instantly

What is AI?

AI is technology that can recognize patterns, summarize information, and answer questions based on the data you give it — similar to having an analyst sitting next to you.

Summarize

"Explain this dataset in one paragraph"

"Show me the top insights"

Detect Trends

"What's trending up or down?"

"Where are we losing momentum?"

Forecast

"Forecast the next 3 months based on history"

"What's our expected landing next quarter?"

Prepare for Line Reviews

"Create talking points"

"Highlight risks and opportunities"

Live Demo

Live Demo Recap

Copilot is everywhere you already work

Web, Outlook, Word, Excel —
no new system to learn.

It turns messy data into usable insight

Summaries, cleanups,
formatting, trend detection

Excel + Copilot = fast forecasting foundation

Summaries, cleanups,
formatting, trend detection

Agents are powerful – but only as good as the data you feed them

We cleaned the report and build a
pivot forecast in minutes

Fabric + Copilot show the future

Automated cleanup, ML
rules, consistent inputs →
forecasting you can trust.

This is why data modeling matters

Good forecasting doesn't
start with AI — it starts with
clean, structured data.

Comparing Copilot Excel, AI Agents & Fabric

Copilot in Excel
Fast, Simple Tasks

Pros:
- Quick insights & summaries for a single file
- Fastest response; minimal setup
- Great for general practitioners

Cons:
- Can be inaccurate with messy data
- Limited to the file you have open
- Cannot read outside Excel / 3rd-party tools

Copilot AI Agents
Cross-File, Workflow Aware

Pros:
- Reads multiple files + M365 data
- Learns your terms and workflows
- More accurate; easy to share across your org

Cons:
- Still can hallucinate if data is inconsistent
- Limited to Microsoft 365 data sources
- Requires setup + ongoing maintenance

Fabric + Copilot Studio
Full Data Platform

Pros:
- Highest accuracy with ML-powered, scalable analytics
- Pulls data from any system for unified insights
- Ideal for forecasting, territory planning & trend analysis

Cons:
- Requires Fabric expertise; UI/UX not highly polished
- Can be slower with large or complex datasets
- Potential cost impact if implemented improperly

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Meet the Speaker

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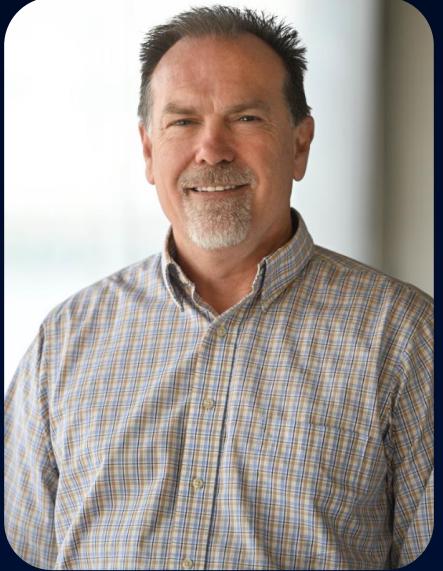
Spencer Wilkinson

Parter, Outside Sales Mid Atlantic Region
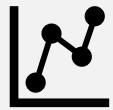
Mid-Atlantic rep covering DE, Eastern PA, MD, Eastern VA, NJ

Over 20 years of experience in fenestration component sales & technical representation

Expert in representing major line cards for windows, doors & insulated glass

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Discussion

Live Demo

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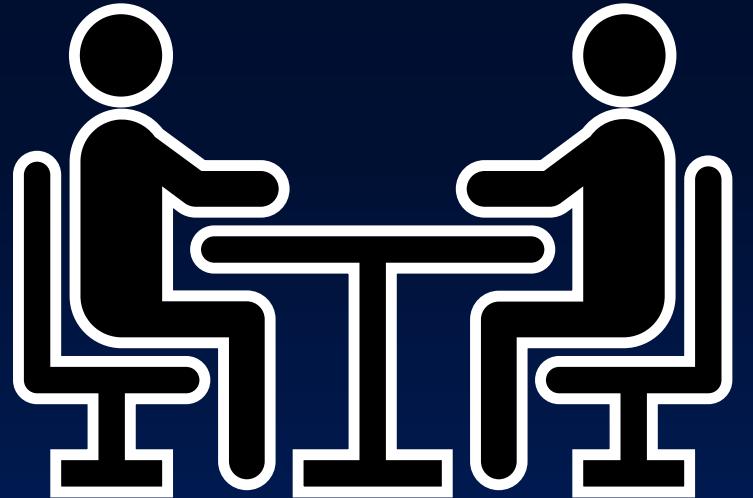
Q&A

Contact Us Today For Your Free Consultation!

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Rep Focused

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