



Suhas Bhairav

AI Competitor Earnings Report News Briefing Flow

**A practical AI flow to summarize earnings and
industry news for execs**

Transform earnings and competitor insights into a
concise, action-ready executive update.

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suhasbhairav.com

Inputs, Data, and Tools

Set up reliable data sources and automation infrastructure. Define what to automate, what to review, and who owns each step.

Key move Confirm data sources and access rights; ensure compliance.

PRACTICAL CHECKLIST

- 01** Subscribe to earnings press releases, quarterly reports (10-Q/10-K), and major industry news feeds.
- 02** Ingest PDFs, HTML, and structured feeds into a secure data store with source lineage.
- 03** Define automation scope: metrics (revenue, EBITDA, margin) and relevant headlines or sentiment signals.
- 04** Build parsers to extract numbers, dates, currency, and quarter references.
- 05** Example: executive brief summarizes top-5 peers' revenue and margin trends.
- 06** Set up AI summaries with human-in-the-loop review for interpretation and strategy.
- 07** Create baseline dashboards to monitor data freshness, completeness, and error rates.

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Automated Executive Briefs

Configure AI to extract key signals and draft a concise, executive-ready briefing. Include human-in-the-loop review for context and strategic alignment.

Key move Ensure executive sign-off thresholds before distribution.

PRACTICAL CHECKLIST

- 01** Extract quarterly metrics (revenue, profit, margins) and QoQ/YoY changes for peers.
- 02** Flag deviations from guidance, market surprises, and sector-wide momentum.
- 03** Summarize earnings calls and management commentary for practical implications.
- 04** Draft a five-section briefing: Highlights, Variances, Trends, Risks, Actions.
- 05** Attach sources with dates and maintain audit trail.
- 06** Retain human review for context and strategic interpretation.
- 07** Store drafts in a secure briefing repository with versioning.

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Adoption Roadmap & Governance

Implement the flow in short weekly sprints to reduce risk and build trust. Define approvals, ownership, and metrics to measure impact over time.

Key move Document decisions and ensure ongoing alignment with strategy.

PRACTICAL CHECKLIST

- 01** Weeks 1-2: deploy data ingesters, validate sources, and establish access.
- 02** Weeks 2-3: implement parsing, taxonomy, and QoQ/YoY calculations.
- 03** Weeks 3-4: train prompts and templates for briefs.
- 04** Week 4: run pilot in a small leadership group.
- 05** Define governance: data quality, access controls, and sign-off cadence.
- 06** Assign owners: data, AI tooling, and editorial workflow.
- 07** Measure success: update speed, accuracy, and strategic usefulness.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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