

Querying your data with Deep Insights Agent

A practical guide to getting the most from your data. Covers the question types the agent handles well, tips for clear prompting, and a few things worth knowing before you start.

THE BASICS

The best starting point for a prompt

The clearest questions follow this pattern:

Show me [metric] for [audience] over [time period] broken by [dimension]

WHAT YOU CAN ASK

Types of questions to ask

The agent draws on your complete customer, order, product, and campaign data. These are the question types it handles most reliably.



Everyday reporting

Replace the weekly reporting grind with a single conversation – campaign stats, revenue overviews, product performance, and health checks in one place.

Campaign performance

"Show me campaign performance last week – broadcast and automation, compared to the week before"

Revenue and orders overview

"Build a revenue overview for the last 3 months: key KPIs, monthly trend, top products, channel breakdown"

Product performance

"What were our top 10 products by revenue last 30 days?"

Weekly health checks

"Weekly health check: automation sends and revenue for this week vs last"

Seasonal and trend analysis

"Did sandal buyers start purchasing earlier this year compared to last?"



Customer intelligence

Understand the health of your customer base – lifecycle, repeat purchase behaviour, and high-value customer profiles – drawing on Ometria's full unified customer view.

Customer lifecycle and database health

"How many customers did we acquire, lapse, and win back each month this year?"

Repeat purchase and retention

"Is it realistic to move our second purchase rate from 13% to 15% this year?"

High-value customer profiling

"Profile our top 10% customers – acquisition channel, first purchase category, campaign engagement"

Segment analysis

"How did the Superfan segment engage with email in the last 3 months?"

New vs returning mix

"Where is the decline in our returning customer base coming from year on year for Q1?"



Strategy and optimisation

Ask what you should do next – and get a data-backed answer. From automation improvements to promotional modelling, DIA turns analysis into action.

Automation audit and design

"What does the post-purchase automation flow look like at node level – what needs updating?"

Cross-sell and product journey

"What category do customers commonly buy second, after a first purchase?"

Promotional and discount modelling

"If we offer a discount after a first purchase, what could this push in repeat rate and incremental revenue?"

Suppression and list hygiene

"Which customers should I be suppressing from sends to improve conversion?"

Attribution and incrementality

"Orders attributed to abandoned basket campaigns by lifecycle segment over the past 3 years"

PROMPTING TIPS

How to get the most from your prompts

1

Be exact about time periods

"March 2026" will give you a more reliable result than "last month." Whenever precision matters, name the dates explicitly.

2

Specify which revenue figure you want

Revenue can be calculated different ways – subtotal, grand total, net of refunds. Tell the agent which you want, especially if you're checking against internal reports.

3

Restate your definitions each session

The agent works within a single conversation. If you start a new session, restate any key filters or rules you want applied consistently throughout.

4

Tackle complex reports one section at a time

For multi-part reports, work through them section by section. You'll get more accurate results and can check each piece as you go.

GOOD TO KNOW

A few things worth being aware of

The agent is built for analysis and insight – not every question will have a single definitive answer, and that's by design.

Estimates are directional, not modelled

When you ask "what might happen if we offer a discount to this segment," the agent reasons from historical data – not a predictive model. Treat these as informed estimates rather than projections.

Revenue figures may need a little guidance

If your numbers don't line up with internal reports, try specifying the exact logic – "use order subtotal, exclude refunds, online channel only." A short back-and-forth to align definitions is normal.

This is an analysis tool, not a data export tool

The agent is designed to answer questions and surface insight. If you need a large data extract – a full product catalogue or complete customer list – your Ometria platform is the right tool.

Link-level email click data is not available

The agent can tell you how a campaign performed overall – sends, opens, clicks, revenue – but not which specific links within an email were clicked. Campaign-level reporting is fully supported.