

# From Historian to Visionary

## **Transforming Finance with Hyperautomation**

January 20, 2026

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# Today's Presenters



**Ryan Kauzlick**  
Director  
Intelligence & Automation



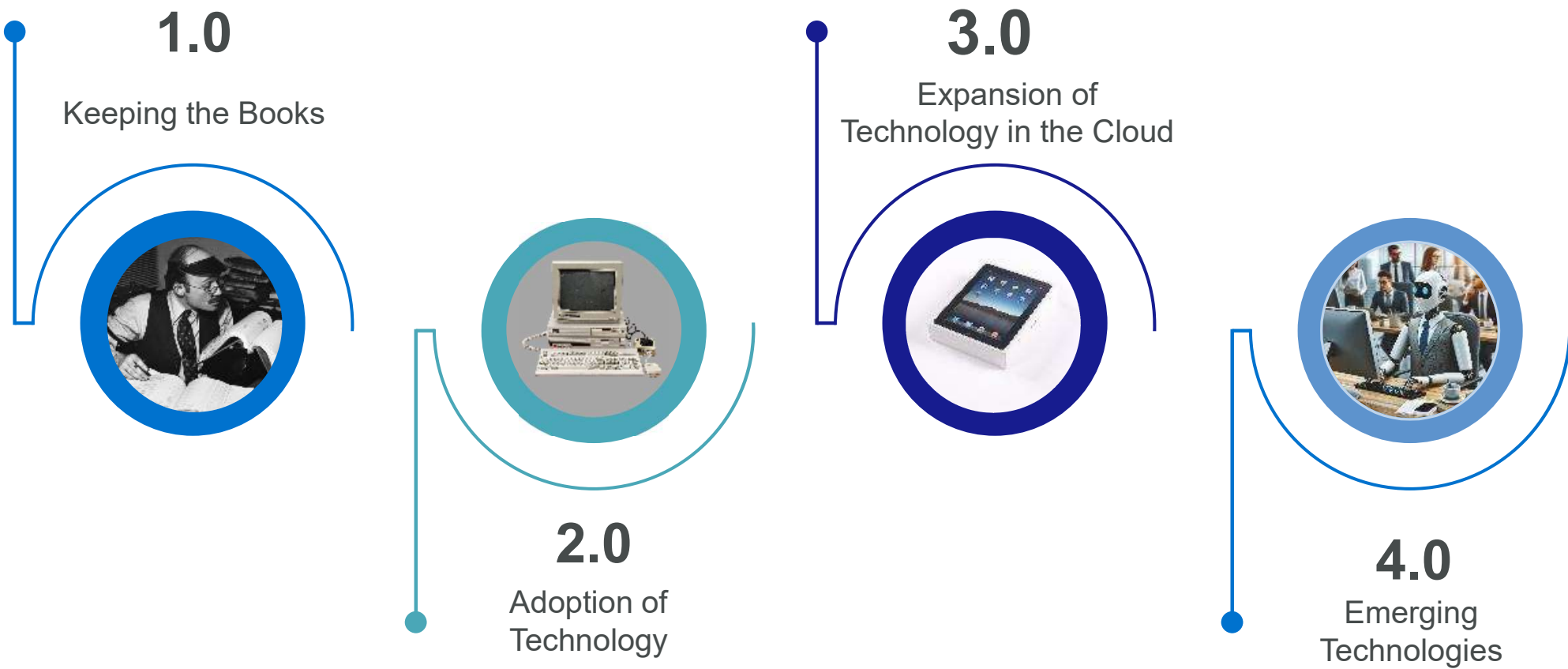
**Kathryn Schneider**  
Director  
Technology Consulting

# Learning Objectives

- 01 Understand how finance professionals can transition from traditional roles to strategic leaders by leveraging digital technologies and automation.
- 02 Gain a clear understanding of hyperautomation—its components (AI, ML, RPA), practical applications, and how these tools can transform business processes.
- 03 Learn actionable strategies for implementing hyperautomation to improve efficiency, reduce errors, and enhance employee satisfaction, supported by real-world examples.



# Evolution in the Role of Finance



# 01

## Why Culture Matters



## Culture Matters Impact on the Bottom Line

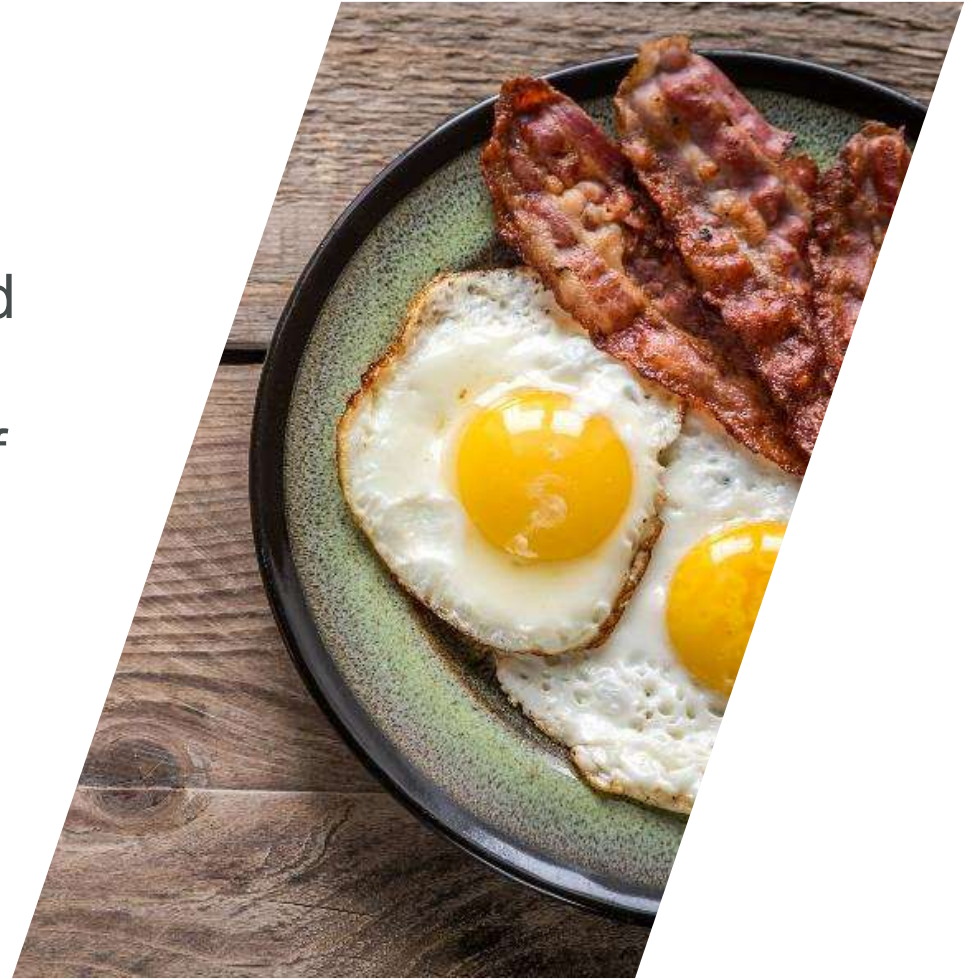
### The Profitability of Innovation

**54%**

More innovators achieved net profit margins of 10% or greater than the rest of the market\*

**38%**

More Innovators achieved growth rates of 10% greater than the rest of the market\*



\*NTT DATA's 2023 Innovation Index

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## Culture Matters

### Role in Innovation



#### Silent Generation

Leverage their experience and pair them with young professionals to encourage knowledge share and foster respect across generations



#### Millennials

Encourage them to lead cross generational project teams that harness their strong tech savviness and fresh perspectives



#### Baby Boomers

Pair them with younger colleagues for mentorship and reverse mentoring



#### GenZ

Encourage GenZ to participate in forums or panels that evaluate new tools or platforms, giving them a voice in their tech evolution



#### GenX

Use their pragmatic nature to mediate older and younger generations; facilitate dialogue and teamwork across age groups

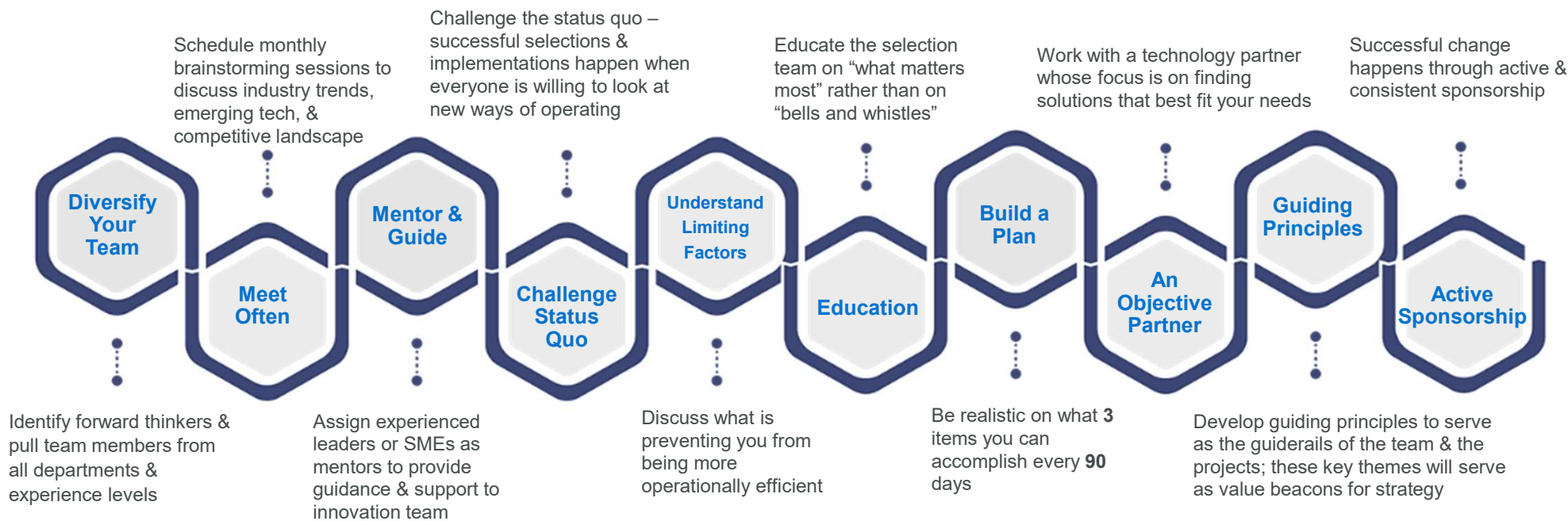


#### Alpha

Encourage an environment that nurtures their curiosity and creativity; Introduce flexible learning opportunities and gamify training modules

# Cultivating Innovation

## Best Practices – Establish an Innovation Team



# 02

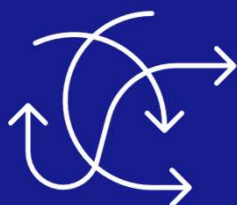
## Houston, We've Got a Problem



# Headwinds Facing Organizations

## Is Automation & AI Right for You?

### Inefficient Processes



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On average companies lose **20 – 30%** of revenue each year due to inefficient processes <sup>1</sup>

<sup>1</sup> [How Inefficient Processes Are Hurting Your Company](#)

### Opportunity for Automation



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On average workers spend **520 hours** annually on tasks that could be automated <sup>2</sup>

<sup>2</sup> [How Repetitive Tasks are Hurting Your Business](#)

### Work Overload



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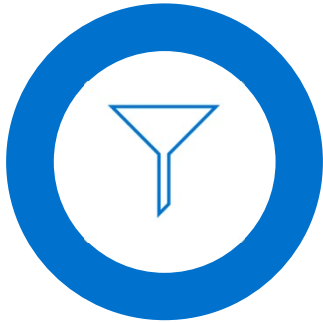
On average **68%** of workers suffer from work overload in which they have too much to handle daily <sup>3</sup>

<sup>3</sup> [Key Business Automation Statistics You Should Know](#)

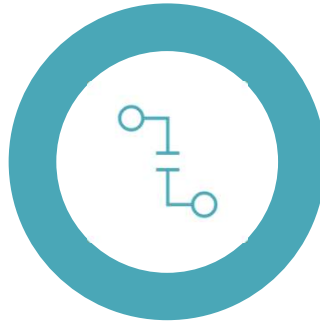
# Business Challenges

## Turning Challenges into Opportunities

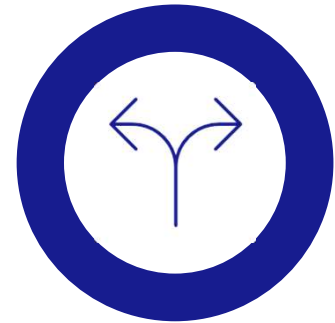
Operational Bottlenecks



Disconnected Systems



Fragmented Data



## Enterprise Automation

Compliment, Connect and Make Intelligent Decisions

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*I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail.*

- Abraham Maslow

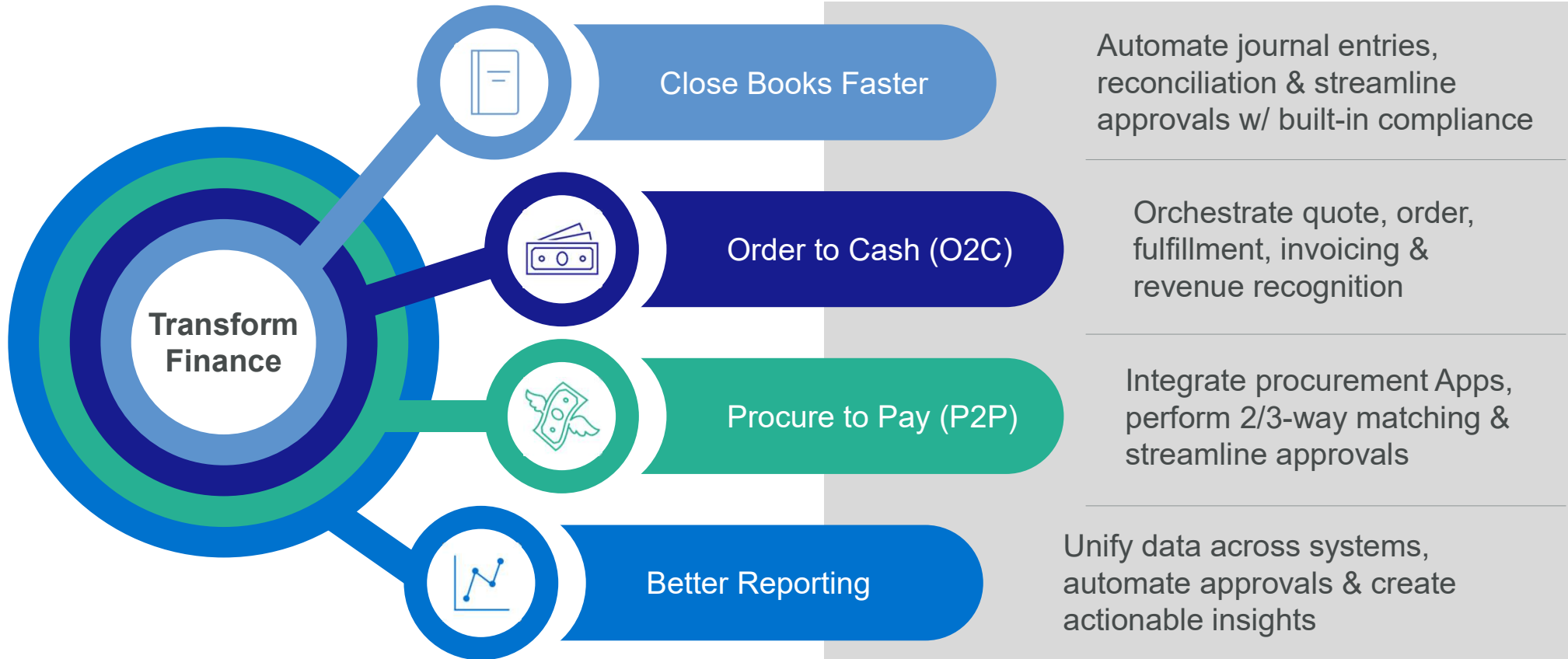


*If all I hear about is Artificial Intelligence (AI), I suppose I should use AI for everything?*

- Ryan Kauzlick

## CFO 4.0

### Transform how Finance Operates



# 03

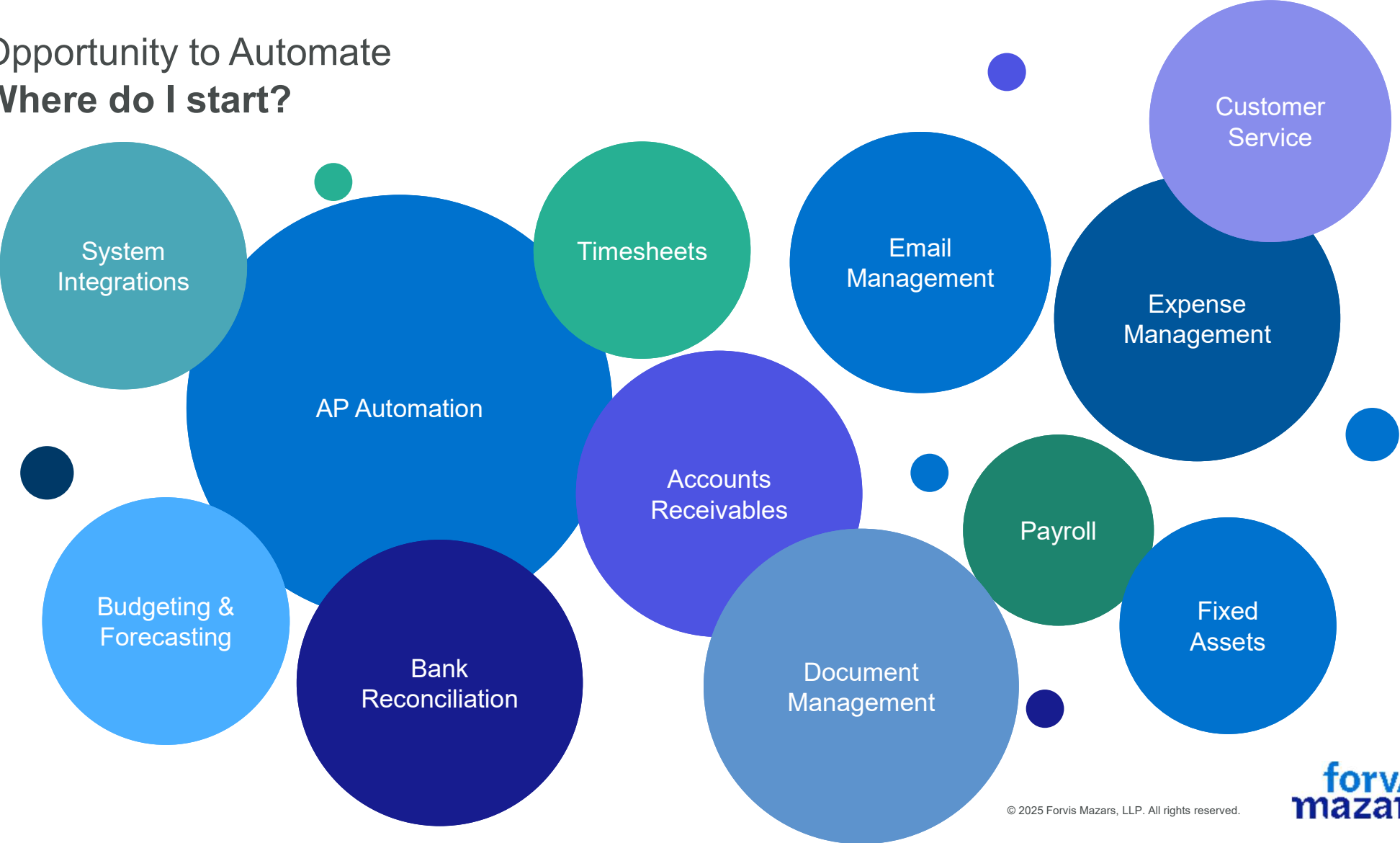
## Opportunity

*“When you walk up to opportunity’s door ... don’t knock it. Kick that ---- in, smile and introduce yourself.”*

– Dwayne “The Rock” Johnson



Opportunity to Automate  
**Where do I start?**



Is there true value?

What do these numbers have in common?

187 %

260 Hrs.

96 %

205 %

391 %

520 Hrs.

\$5 m

128 %

\$ 225 k

# Unlocking the Value of Automation

## **“Robots will steal jobs.”**

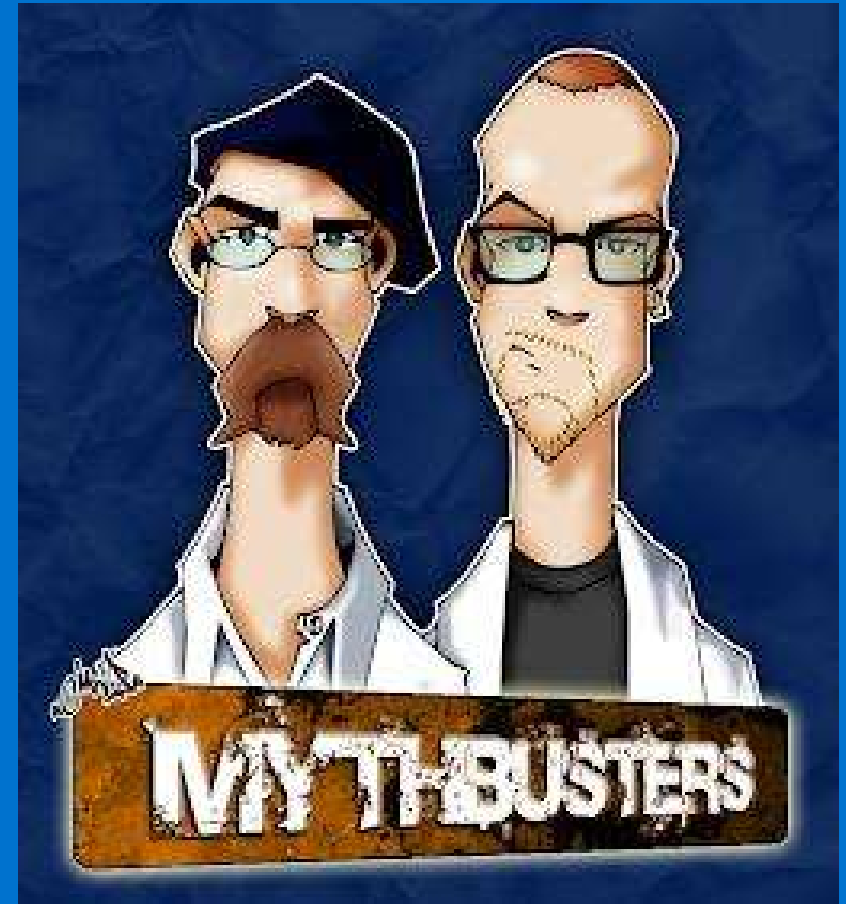
No, they'll steal *tasks*. Your people move up the value chain.

## **“Too small or too unique.”**

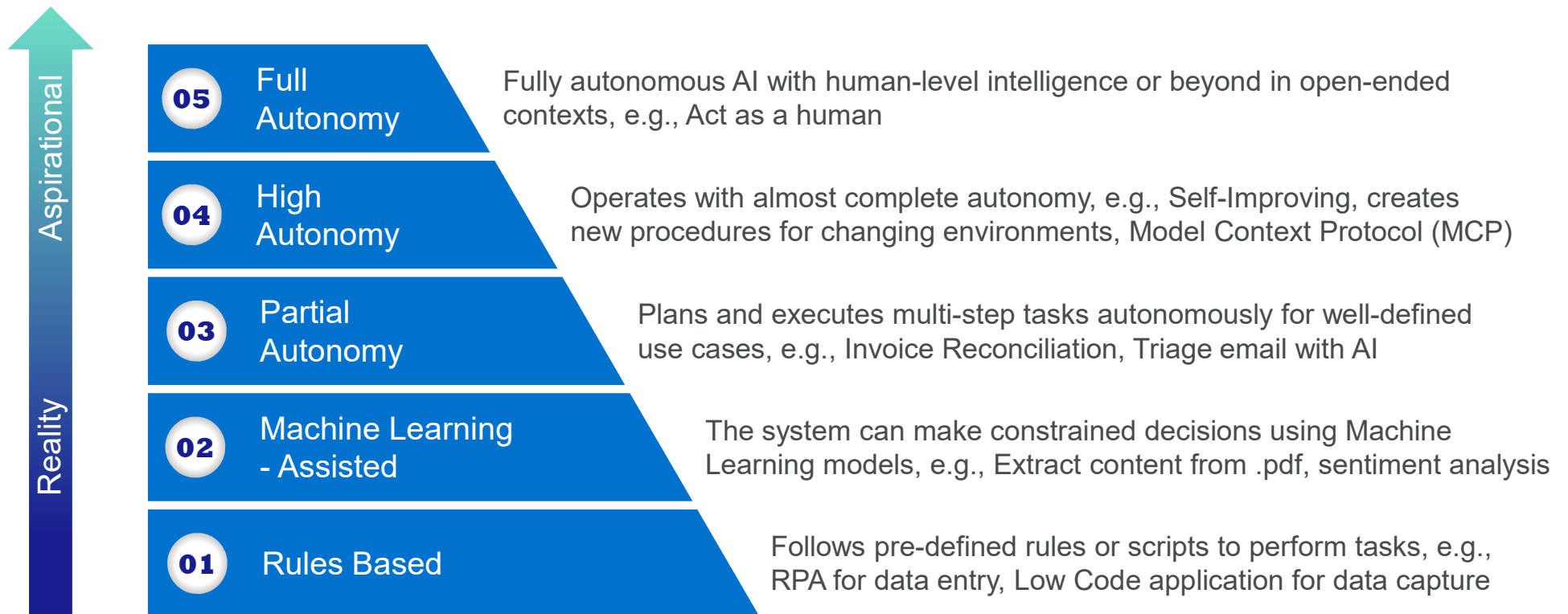
Autonomy scales to any company size and adapts on the fly.

## **“It's a massive IT project.”**

With modern low-code tools, business users steer. IT monitors security; the business owns improvement.



# Enterprise Automation Levels of Autonomy



**NOTE:** Level 4 & Level 5 are aspirational in today's world but getting closer to reality

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# 04

## Automation in Action



# Real World Examples of Automation

## AP Invoice Processing

**INVOICE**

**DATE** 7/11/2024 **INVOICE NO** 000123 **ADVICE CORPORATION**  
7234 Front St. Ave.  
Box 78230  
www.advice.com  
info@advice.com

**INVOICE TO:**  
Innovative, Inc.  
2455 North St.  
NY 10007

Customer ID: 54791

SALESPERSON		PAYMENT TERMS	
Jenna Rodriguez		Net 30	
QUANTITY	DESCRIPTION	UNIT PRICE	LINE TOTAL
06	Pool Filter cartridge	\$9.00	\$54.00
01	C Filter replacement	\$12.40	\$12.40
01	Chemical testing kit	\$85.00	\$85.00

Subtotal: \$147.39  
Sales Tax: \$2.55

Extract invoice data

## Customer Service

**Send** **To** Ryan.Kauzlick **Cc**

**Subject** Product Issues

Dear Ryan,

Thank you for your feedback. We understand you are having trouble with your product. Please find the following steps to troubleshoot.

Thank you, Kathryn

**ABC**  
Supply Co. Inc.

Respond to customer emails

## HR Chatbot

**HR Bot**  
Built using Microsoft Copilot Studio

**Employee Records**  
"I need the email address for employee 123456"

**HR Policies**  
"Can you tell me the company's HR policies?"

**Leave Requests**  
"How do I request leave?"

**Onboarding Process**  
"What are the steps to get onboarding new employees?"

**Compensation**  
"What are the salary ranges for different roles?"

**Performance Reviews**  
"How can I schedule a performance review?"

Open a dialog

Locate HR information quickly

Sample Use Case

Write Invoice Data to System

Utilizing Robotic Process Automation (RPA)

Requirement

Need the ability to extract data from a .pdf and input into a disparate system

INVOICE

DATE

7/1/2024

INVOICE NO

000123

ACME CORPORATION

234 France Ave.

WA 76328

www.adatum.com

sales@acme.com

INVOICE TO

Fabrikam, Inc.

345 North St.

NY 98052

Customer Id: 5791

SALESPERSON

Jacob Steffensen

PAYMENT TERMS

Due on Receipt

QUANTITY

DESCRIPTION

UNIT PRICE

LINE TO

19.80

12.49

35.00

Line	Date	Amount	Invoice No	Contact Email	Amount	Status
1041	7/1/2024	\$ 20.00	Johnson Corporation	john@johnson.com	\$ 20.00	Invoiced
1042	7/1/2024	\$ 149.25	ACME CORP	sales@acme.com	\$ 149.25	Invoiced
1043	7/1/2024	\$ 75.00	Johnson Corporation	john@johnson.com	\$ 75.00	Invoiced
1047	7/1/2024	\$ 24.00	ACME CORP	sales@acme.com	\$ 24.00	Invoiced
1048	7/1/2024	\$ 30.00	Acme Printing	sales@acmeprinting.com	\$ 30.00	Invoiced
1049	7/1/2024	\$ 80.00	Johnson Corporation	john@johnson.com	\$ 80.00	Invoiced
1050	7/1/2024	\$ 30.00	ACME CORP	sales@acme.com	\$ 30.00	Invoiced
1051	7/1/2024	\$ 90.00	Johnson Corporation	john@johnson.com	\$ 90.00	Invoiced

Invoice Detail

ID: 1001

Date: 7/1/2024

Account: Johnson Corporation

Contact: sales@johnson.com

Amount: \$90.00

Status: Invoiced

Subflows

Main

1

Region Initialize

(8 Actions)

8

End region

9

For each

Currentfile in PDFfiles

10

Region

Extract Data From Invoices

(7 Actions)

18

End region

19

Region

Enter into ERP

(8 Actions)

28

End region

29

Region

Reconciliation

(3 Actions)

33

End region

34

End

35

Region

Clean-up

(2 Actions)

38

End region

## Sample Use Case AP Automation

Process/Workflow Using Power Automate

# Requirement

The team must efficiently extract, verify, and approve invoices.

02

Machine Learning - Assisted

The 'Invoices' dashboard features a sidebar with five filter buttons: 'All' (blue), 'New' (purple), 'Pending Approval' (teal), 'Approved' (green), and 'Rejected' (red). The main area displays a list of invoices. The first invoice is from 'Contoso Coffee Shop' with invoice number 1021 and a total amount of \$3,345.87. The second invoice is from 'ADATUM CORPORATION' with invoice number 1783 and a total amount of \$90.20. Each invoice entry has a 'New' button and a right-pointing arrow.

The 'Review Invoices' screen shows a detailed view of invoice 1021 from 'Contoso Coffee Shop'. The invoice total is \$3,345.87 and the date is 2/14/2019 7:05 PM. A table lists the items on the invoice:

Item/Product	Qty	Unit Price	Unit Cost	Validated
Cafe S-100 Semi-Automatic	20	486.33	\$726.66	<input type="checkbox"/>
Cafe A-100 Automatic	5	945.75	4743.75	<input checked="" type="checkbox"/>
Cafe A-200 Automatic	15	682.35	10235.25	<input type="checkbox"/>
Cafe S-200 Semi-Automatic	3	56.97	170.91	<input type="checkbox"/>
Cafe Conto	8	748.88	\$949.44	<input type="checkbox"/>

At the bottom of the screen are 'Cancel' and 'Submit for Approval' buttons. On the right, a preview of the invoice document is shown, including the company logo, contact information, and a detailed itemized list with quantities, unit costs, and amounts.

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## Sample Use Case

# Download Files from Web Application

Utilizing Power Automate Desktop

## Requirement

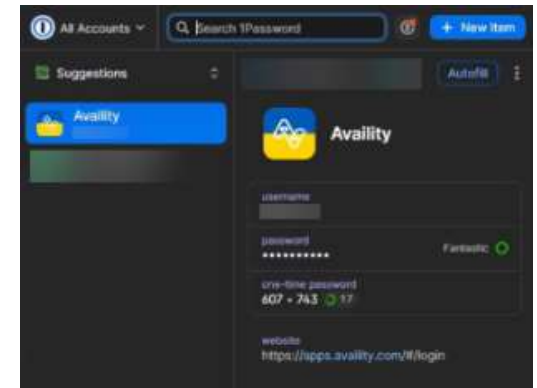
The team requires the downloading of data from website daily.

01

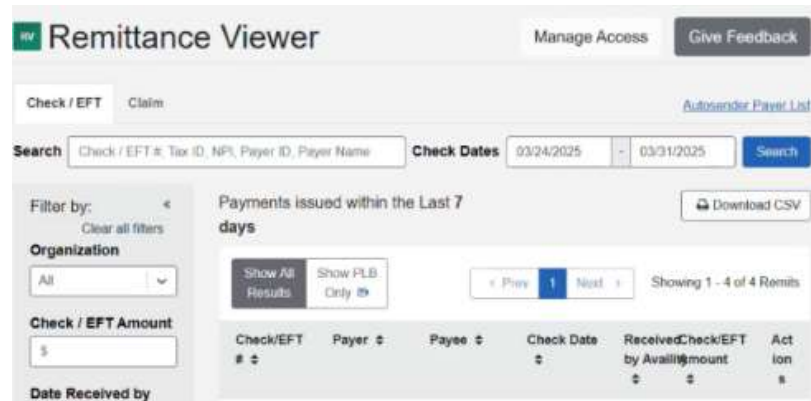
Rules Based



The image shows the Availity Sign In page. It features the Availity logo at the top. Below it is a 'Sign In' section with two input fields: 'User ID' and 'Password'. The 'User ID' field has a placeholder text 'Enter your user ID.' and the 'Password' field has a placeholder text 'Enter your password.' and a small eye icon for toggling visibility. Below the input fields is a blue 'Sign In' button. At the bottom, there are two links: 'Forgot your user ID?' and 'Forgot your password?'.



The image shows the Availity 1Password integration screen. It features the Availity logo and a search bar for 1Password. Below the search bar, there are two columns. The left column shows a list of suggestions, including 'Availity'. The right column shows the details for the selected 'Availity' item, including a 'username' field, a 'password' field with a 'Fill' button, and a 'one-time password' field with a 'Fill' button. At the bottom, there is a 'website' field with the URL 'https://apps.availity.com/#/login'.



The image shows a screenshot of the 'Remittance Viewer' application. It has a header with 'Remittance Viewer' and buttons for 'Manage Access' and 'Give Feedback'. Below the header, there are tabs for 'Check / EFT' and 'Claim'. A search bar is present with a placeholder 'Check / EFT #: Tax ID, NP, Payer ID, Payer Name'. To the right of the search bar are 'Check Dates' (03/24/2025 - 03/31/2025) and a 'Search' button. Below the search bar, there is a 'Filter by:' section with a 'Clear all filters' link. The 'Filter by:' section includes 'Organization' (set to 'All') and 'Check / EFT Amount' (set to '\$'). To the right of the filters, there is a 'Payments issued within the Last 7 days' section with buttons for 'Show All Results' and 'Show PLB Only'. Below this, there is a table with columns: 'Check/EFT #', 'Payer', 'Payee', 'Check Date', 'ReceivedCheck/EFT by Availity amount', and 'Action'. The table shows 1-4 of 4 Remits. At the bottom right, there is a 'Download CSV' button.

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## Sample Use Case

# Locate HR Information Quickly

Utilizing Power Platform

# Requirement

Need the ability to ask a Bot specific questions across multiple topics.

03

Partial Autonomy

**Name**  
HR Bot

**Description**  
An agent designed to assist with topics related to Human Resources and employee benefits. It provides information, guidance, and support on various HR-related matters, including employee benefits, policies, and procedures.

**Instructions**

- Provide accurate and up-to-date information on HR-related topics.
- Assist users with inquiries about employee benefits, policies, and procedures.
- Offer guidance on HR best practices and compliance.
- Respond to user queries in a friendly and professional manner.
- Ensure confidentiality and privacy of sensitive information.
- Avoid discussing topics outside the scope of Human Resources and employee benefits.

**HR Bot**  
Built using Microsoft Copilot Studio

<b>Employee Benefits</b> What are the available employee benefits?	<b>HR Policies</b> Can you explain the company's PTO policy?	<b>Leave Requests</b> How can I request leave?
<b>Onboarding Process</b> What is the onboarding process for new employees?	<b>Compliance</b> What are the compliance requirements for HR?	<b>Performance Reviews</b> How are performance reviews conducted?

**10:28 AM (Generated) 2:18 PM**

**The travel expense policy at Contoso includes the following guidelines:**

1. Eligible travel expenses include airfare, lodging, ground transportation (such as parking fees).
2. All expenses must be directly related to company business and must be reasonable.
3. Employees are required to obtain prior approval from their manager for any expenses exceeding \$500.
4. Expense reports must be submitted within 30 days of incurring the expense to ensure timely reimbursement.
5. Original receipts must be submitted for all expenses, and expense reports must include the date, amount, and purpose of each expense.
6. Credit card statements alone are not sufficient documentation.
7. Reimbursements will be processed within 15 business days of receipt of the approved expense report.

**2:18 PM**

**What is the benefits for paternal leave?**

**HR Bot (Generated) 2:19 PM**

During paternal leave at Contoso, eligible employees will continue to receive their regular salary and benefits. Upon return from paternal leave, employees will be restored to their original or an equivalent position with equivalent pay, benefits, and other employment terms.

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## Sample Use Case

# Manage Email & Auto Replies

Utilizing Power Platform

# Requirement

Ability to monitor the intent of an email, categorize the email and reply based on the categorization.

03

## Partial Autonomy



Name  
Email Monitor

### Description

You are an agent that will monitor new emails that come in to the inbox and will properly categorize those emails based on the instructions below.

### General instructions

**\*\*Task:\*\*** Monitor the email inbox continuously.

### **\*\*Instructions:\*\***

**\*\*Analyze Incoming Emails:\*\*** For each incoming email, analyze the content thoroughly.

**\*\*Categorize Emails:\*\*** Categorize each email into one of the following categories based on its primary subject matter:

**\*\*Sales:\*\*** Emails related to customer inquiries, product information, sales pitches, order confirmations, or any communication aimed at generating revenue.

**\*\*Operations:\*\*** Emails concerning day-to-day business activities, logistics, project management, internal processes, or coordination between departments.

**\*\*Finance:\*\*** Emails involving financial transactions, invoices, budget reports, expense approvals, or any communication related to monetary matters.

**\*\*Volunteering:\*\*** Emails about volunteer opportunities, community service projects, volunteer coordination, or any communication related to volunteer activities.

**\*\*Other:\*\*** If the content does not clearly fit into Sales, Operations, Finance, or Volunteering, categorize the email as 'Other.'

**\*\*Output Format:\*\*** Output as a JSON object.

### **\*\*Respond to Volunteering Inquiries\*\***

If the context of the email is about volunteering and the sender is asking about scheduling, respond with a well-formatted email using the "Reply to Volunteer" action. The response should:

1. **\*\*Thank them for reaching out.\*\***

2. **\*\*Summarize the understanding of the request in the original email.\*\***

3. **\*\*Provide the contact information of the Volunteer Coordinator.\*\***

4. **\*\*State that someone from the office will be reaching out to them.\*\***

5. **\*\*Provide the phone number 1-234-567-8901 if they want to talk to someone directly.\*\***

The response will create a well-formatted message body using HTML with proper line breaks. It will use the MessageId from the original email and pass that as a parameter along with the email address in the FROM of the original email.

If it is a Volunteer Schedule Request, do not move the email until after the reply email has been sent.

## Sample Use Case

## Manage Product Feedback &amp; Draft Responses

Utilize Workato to proactively engage customers

## Requirement

Receive reviews /  
feedback on products  
and want to draft email  
responses based on  
sentiment of feedback

The screenshot displays a Workato workflow titled "Create Draft Response" and a Google Sheet titled "Product Review".

**Workato Workflow:**

- Step 1:** "Parse text to find specific information using AI by Workato" (Attempts to extract and get the Product Name).
- Step 2:** "Get match category" (Uses 2 equals/negative).
- Decision:** "Yes" or "No".
- Yes Path:** "Post message to Slack" (If negative posts message to Slack for Human to review & respond).
- No Path:** "DO: do the following steps".
- DO Step:** "Send messages to Azure OpenAI GPT 4.0 Mini" (Uses OpenAI to generate a draft Email based on a Neutral or Positive Feedback).
- Final Step:** "Update a row in a sheet in Google Sheets".

**Google Sheet (Product Review):**

A	B	C	D	E	F	G
Email	Rating	Response	Sentiment	Category	Product Name	[DRAFT] Response
janedoe@email.com	5	The widget is one of the best products I've ever used. Definitely going to share this with all of my friends and family.	Positive	Quality of Product	widget	Thank you so much for your wonderful feedback! We're thrilled to hear that you consider the widget one of the best products you've ever used. It means a lot to us that you're excited to share it with your friends and family. We truly appreciate your support!

# 05

## Where to Start



## Strategy Considerations

### Making Technology Work for You



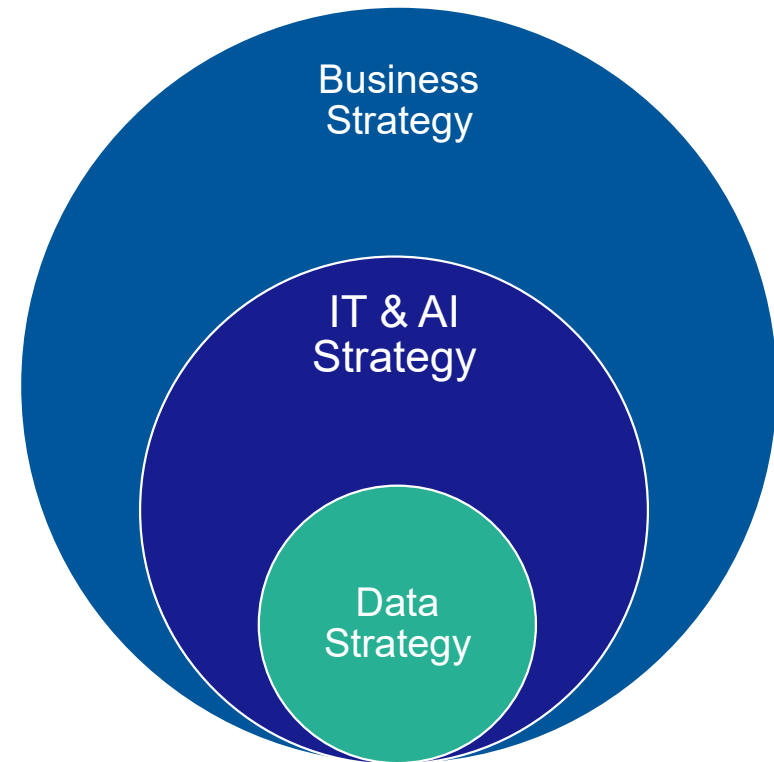
**Business Strategy:** Guides the direction and actions of a company to ensure sustainable growth and success in the market



**IT & AI Strategy:** Guides the integration of IT resources with broader company strategy to enhance productivity, competitiveness and efficiency



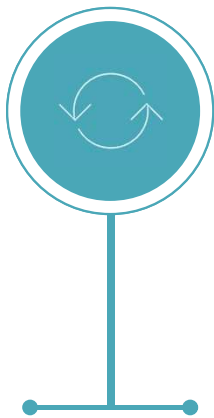
**Data Strategy:** Guides how data will be collected, stored, governed and used, ensuring that data supports decision –making and drives value across the organization



# Identifying the Right Processes

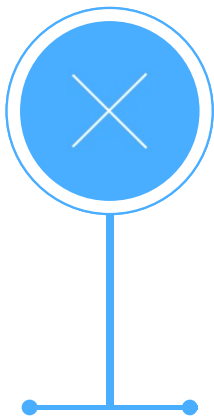
## Key Considerations

Find the Right Process to Automate



### Repetitiveness

Processes that involve repetitive tasks.



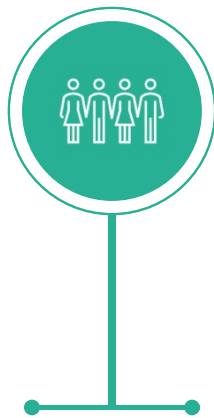
### Error Prone

Process is prone to human error.



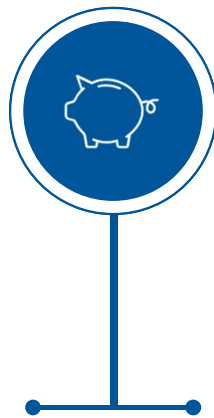
### Volume

Processes that are performed frequently by multiple individuals.



### Employee Impact

Process impact the roles and responsibilities of employees.



### Cost Savings

Process has high potential cost savings from automating a process.

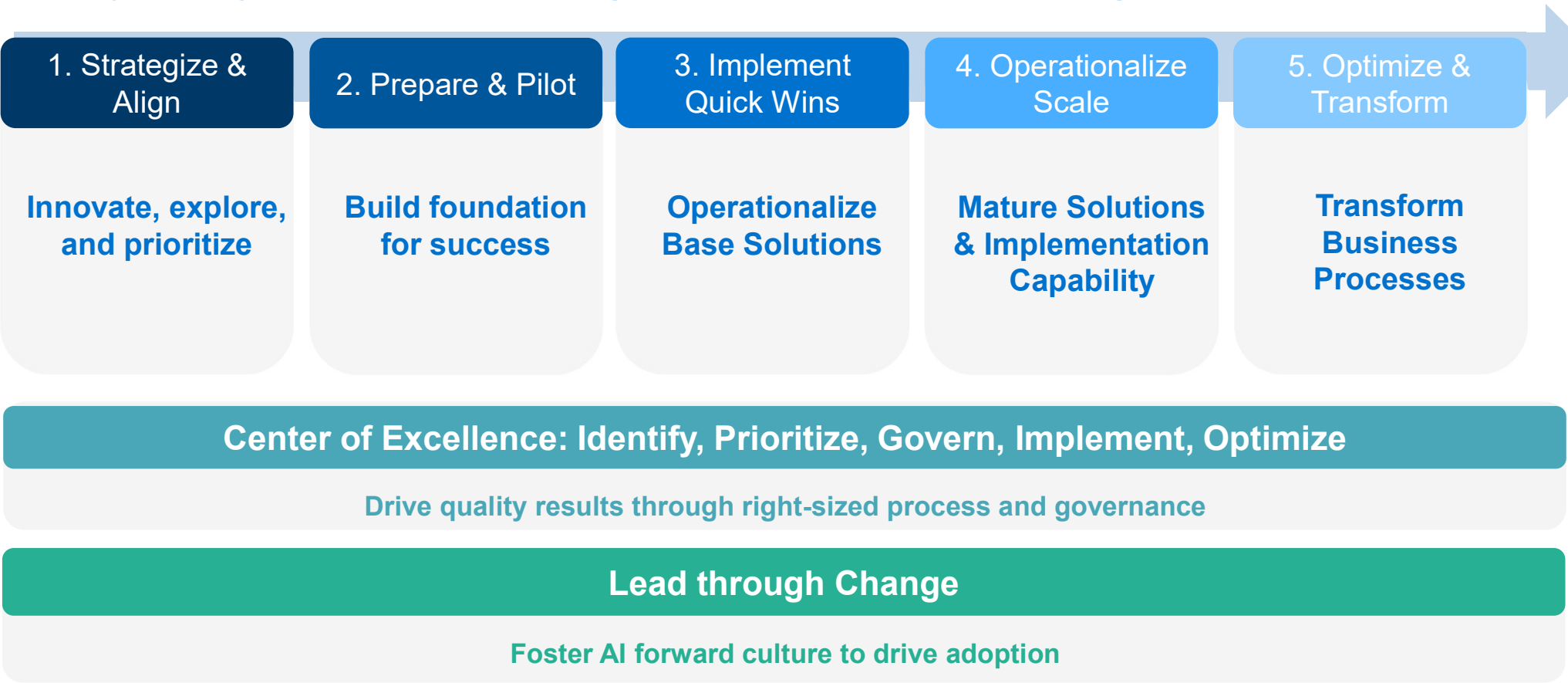


### Scalability

Process needs to scale as the business grows.

The AI and Automation Roadmap

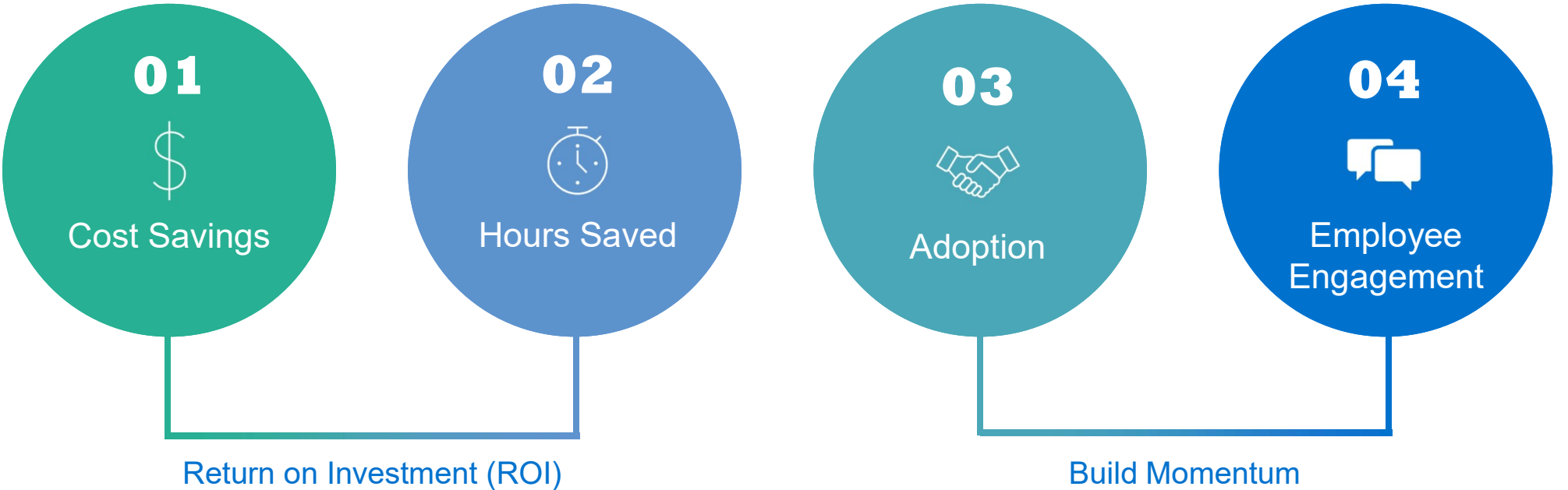
**Your journey to build an AI program and become a strategic advisor**



# Unlocking the Value of Automation & AI

## Start Small & Measure Value

**248%** Return on investment over three years\*



\*Source: The Total Economic Impact® of Microsoft Power Automate – July 2024.

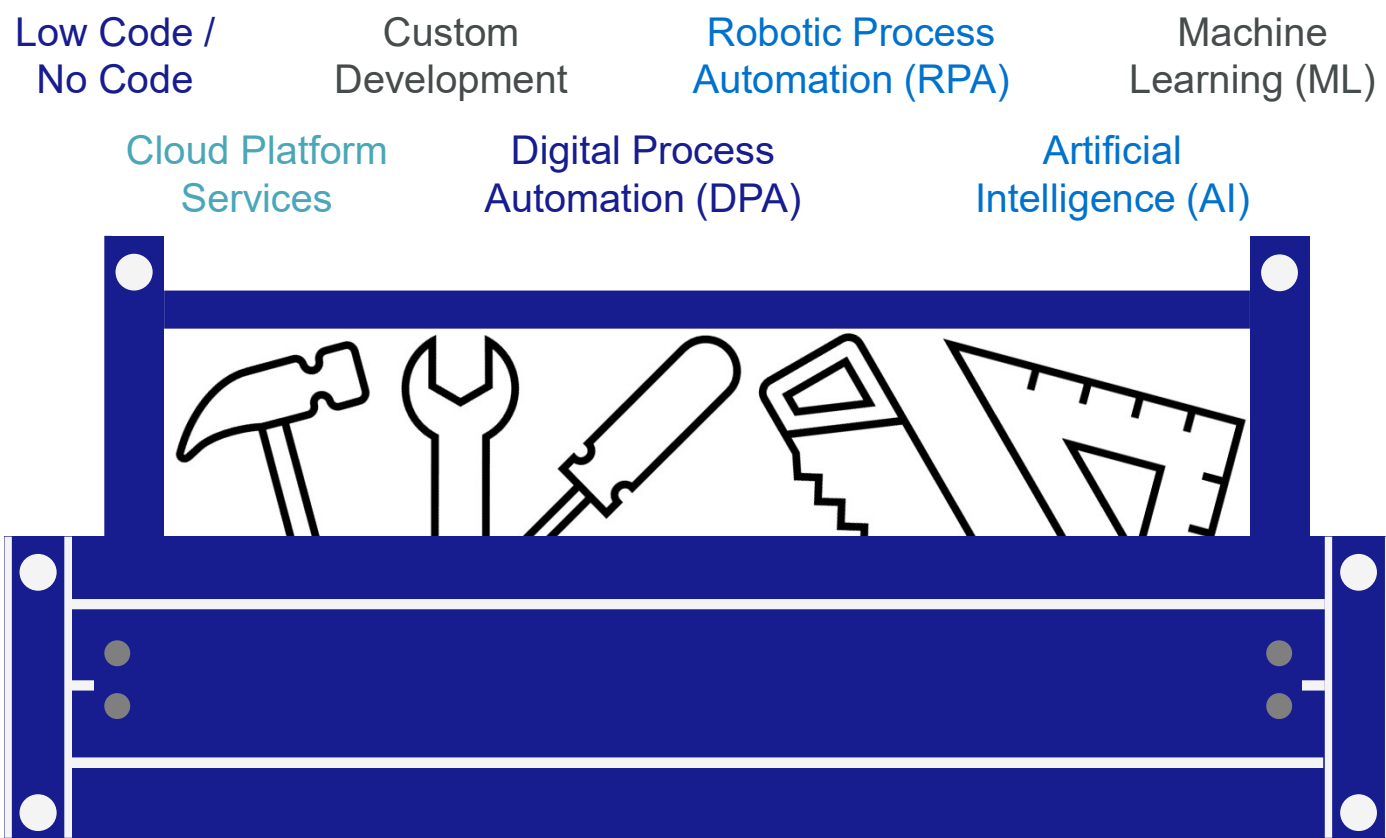
# 06

## Toolkit



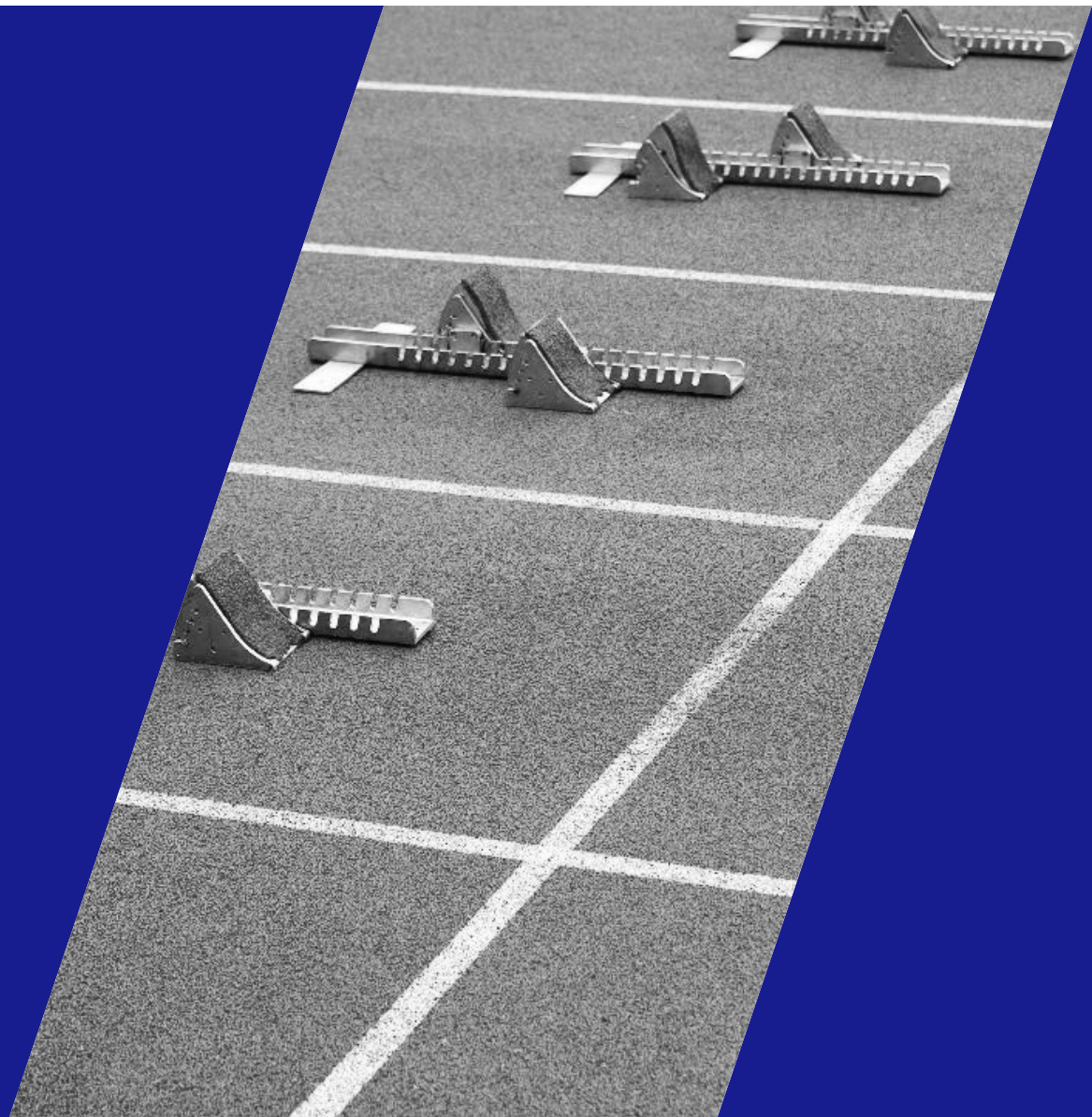
You Have a Toolbox

Use the Right Tool for the Job



# 07

Are You Ready?





## Key Takeaways



### Efficiency

Hyperautomation drives efficiency in businesses by automating repetitive tasks, optimizing processes, and reducing manual intervention.



### Accuracy

Hyperautomation looks to minimize the risk of human errors leading to enhanced accuracy of data within a financial process.



### Reallocate

Hyperautomation enables workers to focus on activities that require critical thinking to enhance overall business productivity.



### Scalability

Hyperautomation supports the growing workloads of resources without increasing the number of human resources.



## Call to Action

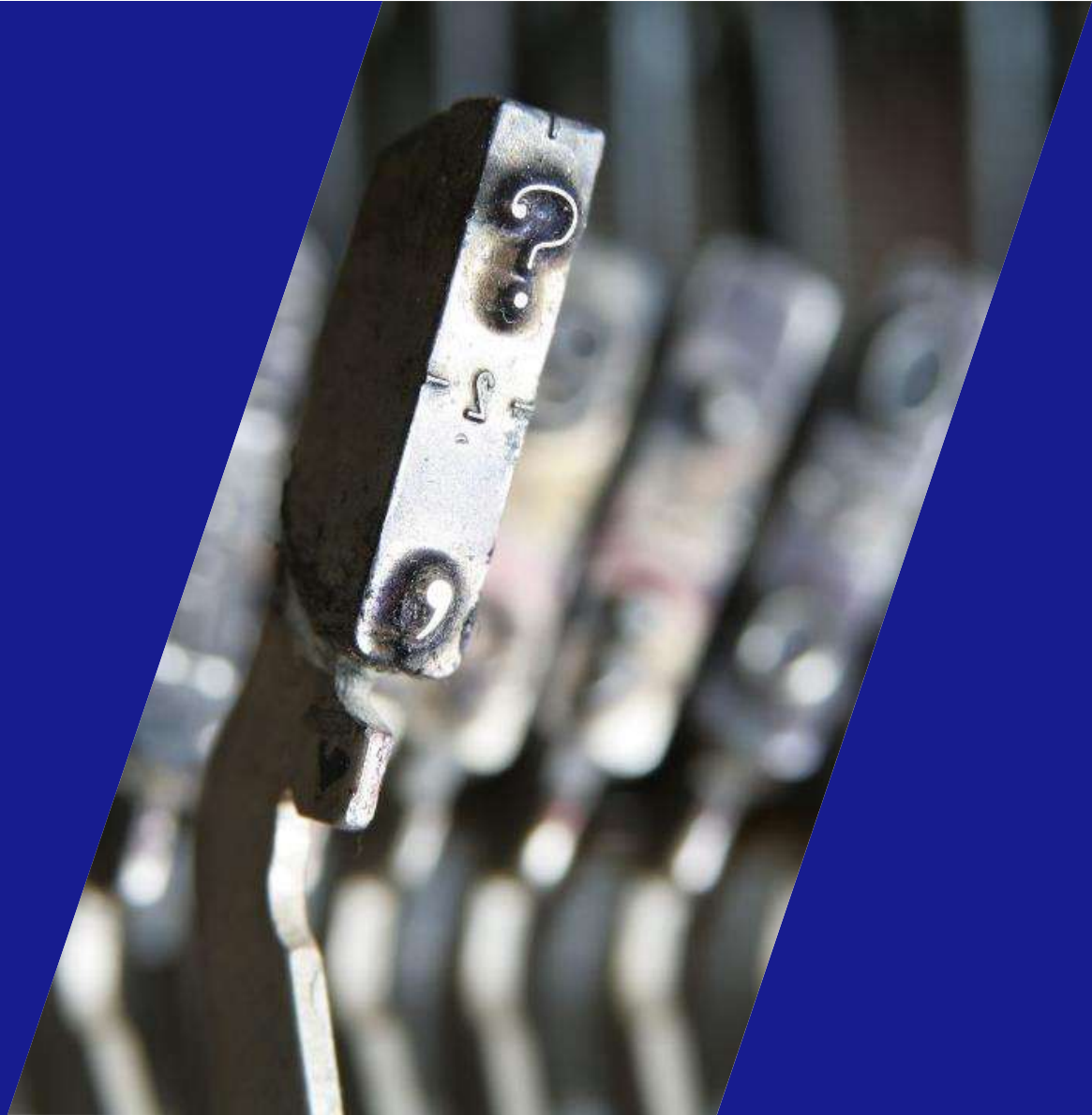
- Embrace the power of hyperautomation
- Your journey begins now, and it's never too late
- Focus on your unique business processes and dare to break away from the crowd

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# 08

## Questions & Answers





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