



From Historian to Visionary Transforming Finance with Hyperautomation

January 20, 2026

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Today's Presenters



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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

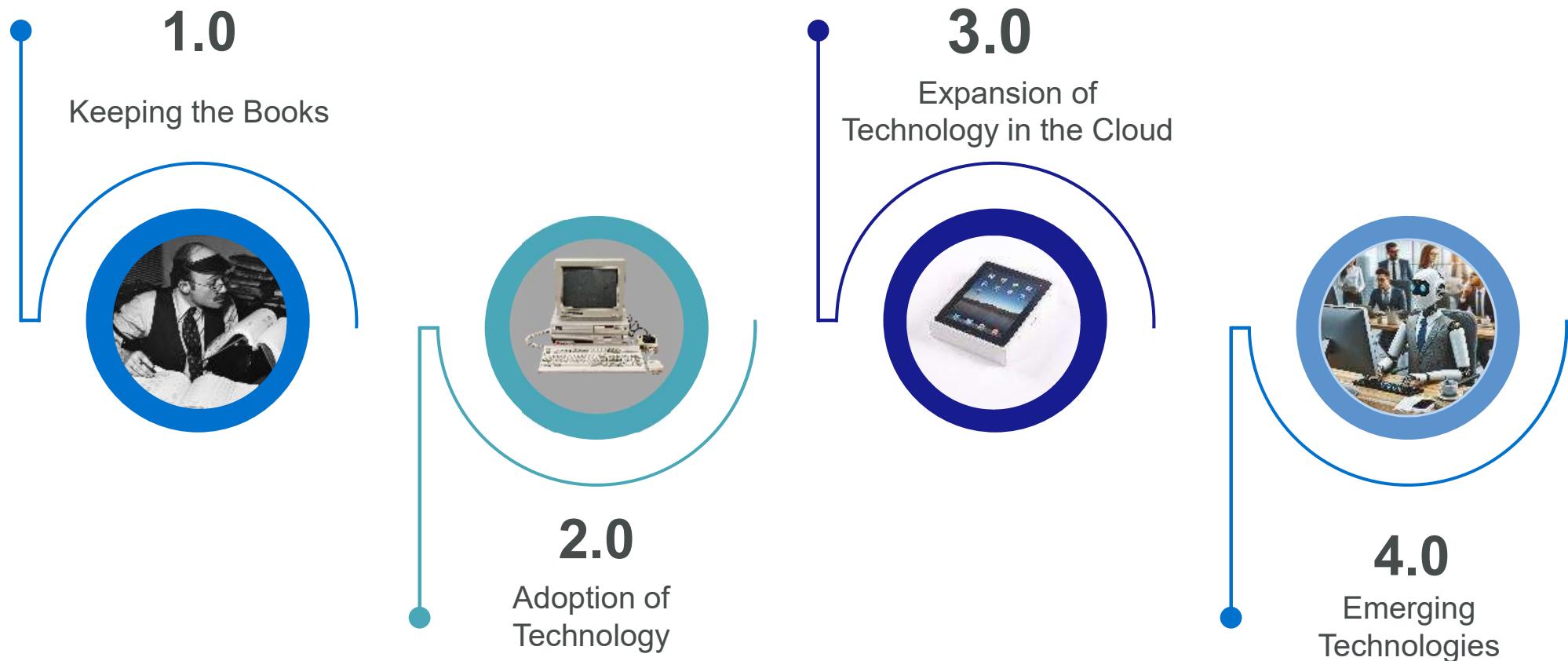
Learn actionable strategies for implementing hyperautomation to improve efficiency, reduce errors, and enhance employee satisfaction, supported by real-world examples.



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Evolution in the Role of Finance



01

Why Culture Matters



Culture Matters Impact on the Bottom Line

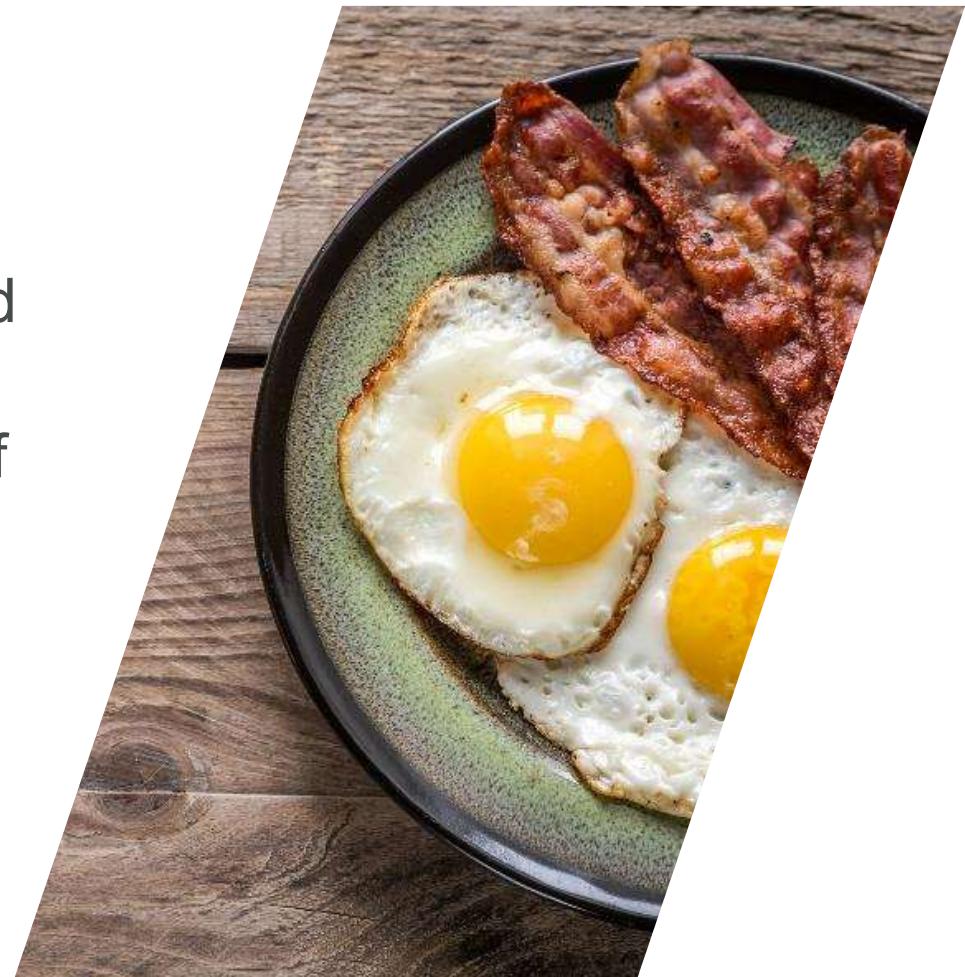
The Profitability of Innovation

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



Baby Boomers

Pair them with younger colleagues for mentorship and reverse mentoring



GenX

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



Millennials

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



GenZ

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

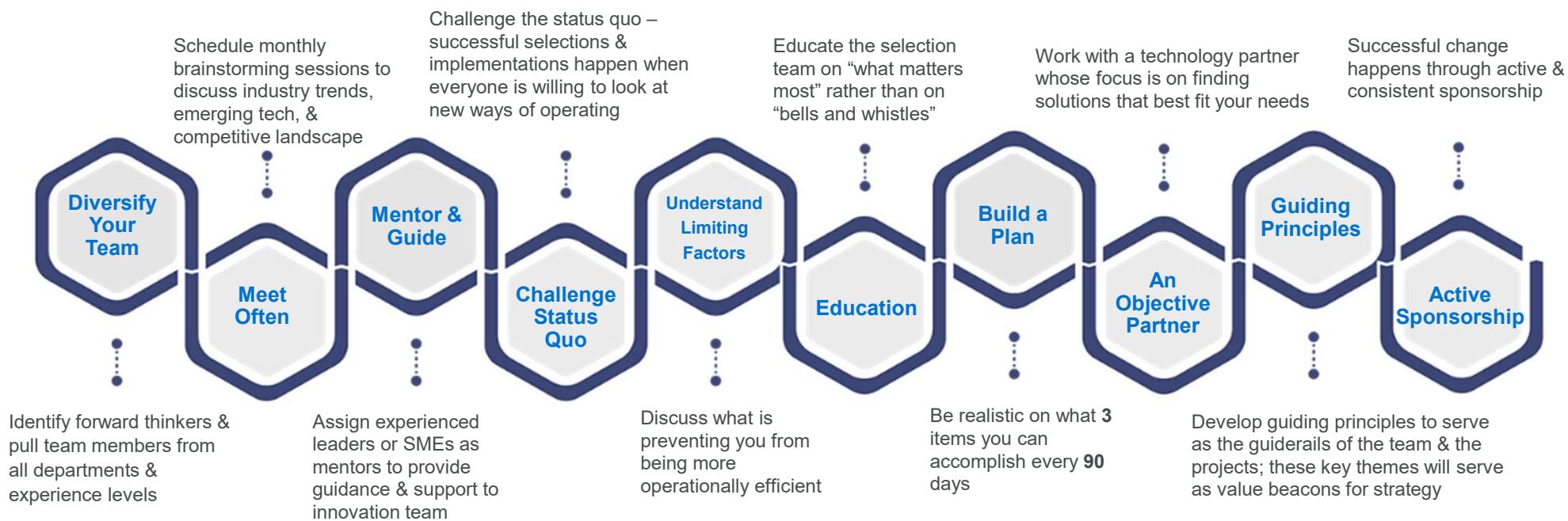


Alpha

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

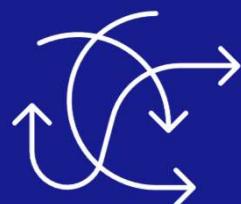
Houston, We've Got a Problem



Headwinds Facing Organizations

Is Automation & AI Right for You?

Inefficient Processes



On average companies lose **20 – 30%** of revenue each year due to inefficient processes¹

Opportunity for Automation



On average workers spend **520 hours** annually on tasks that could be automated²

Work Overload



On average **68%** of workers suffer from work overload in which they have too much to handle daily³

¹ [How Inefficient Processes Are Hurting Your Company](#)

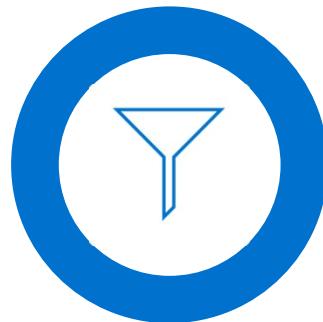
² [How Repetitive Tasks are Hurting Your Business](#)

³ [Key Business Automation Statistics You Should Know](#)

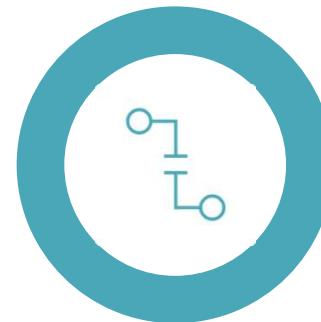
Business Challenges

Turning Challenges into Opportunities

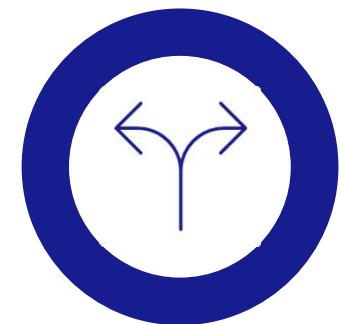
Operational Bottlenecks



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

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

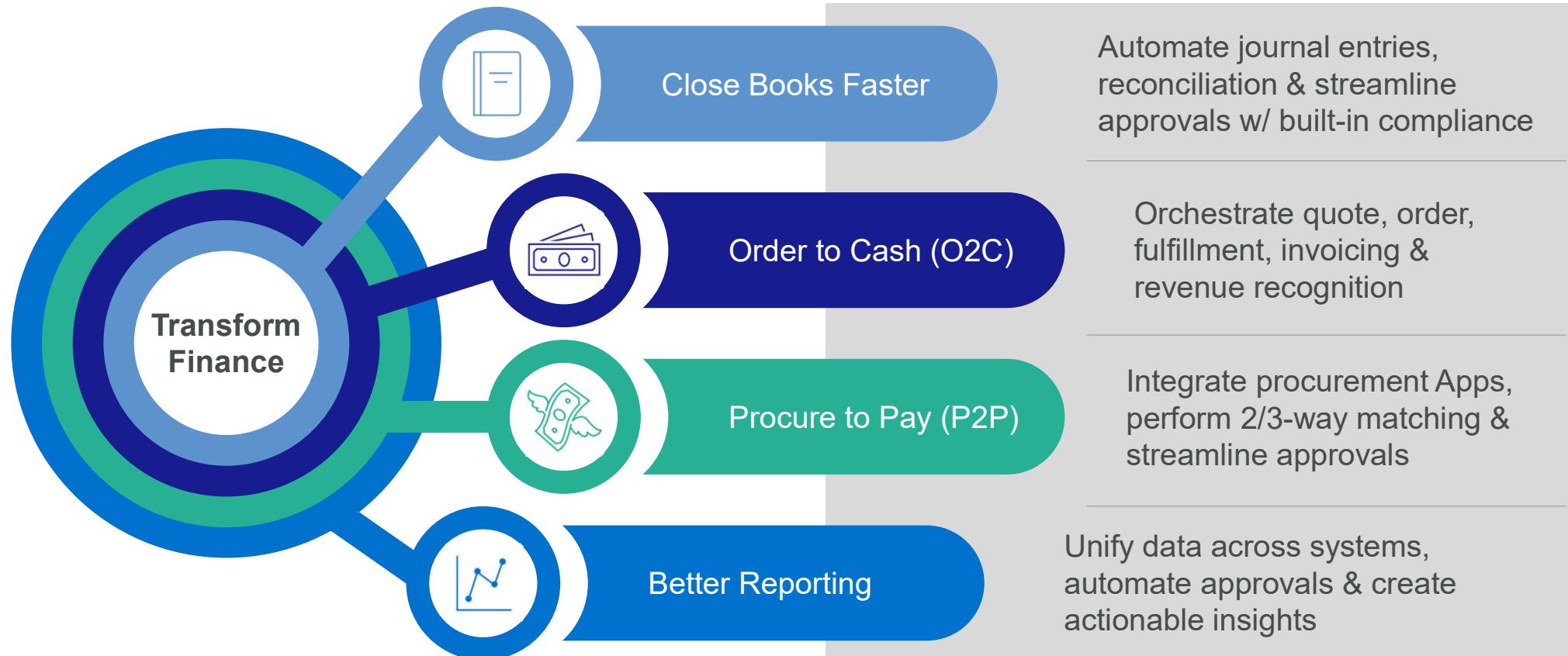
- Ryan Kauzlick

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CFO 4.0

Transform how Finance Operates



03

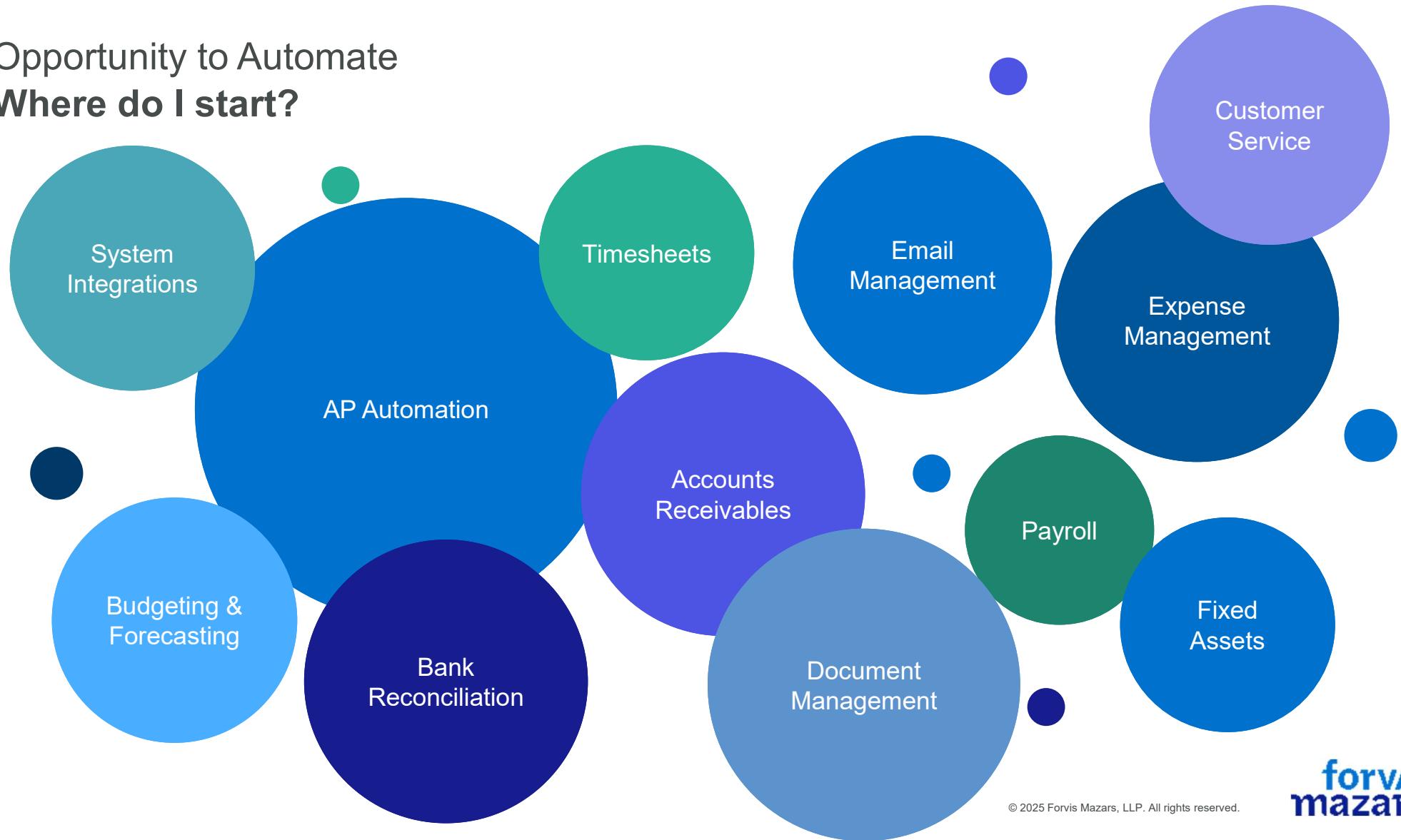
Opportunity

“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

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Unlocking the Value of Automation

“Robots will steal jobs.”

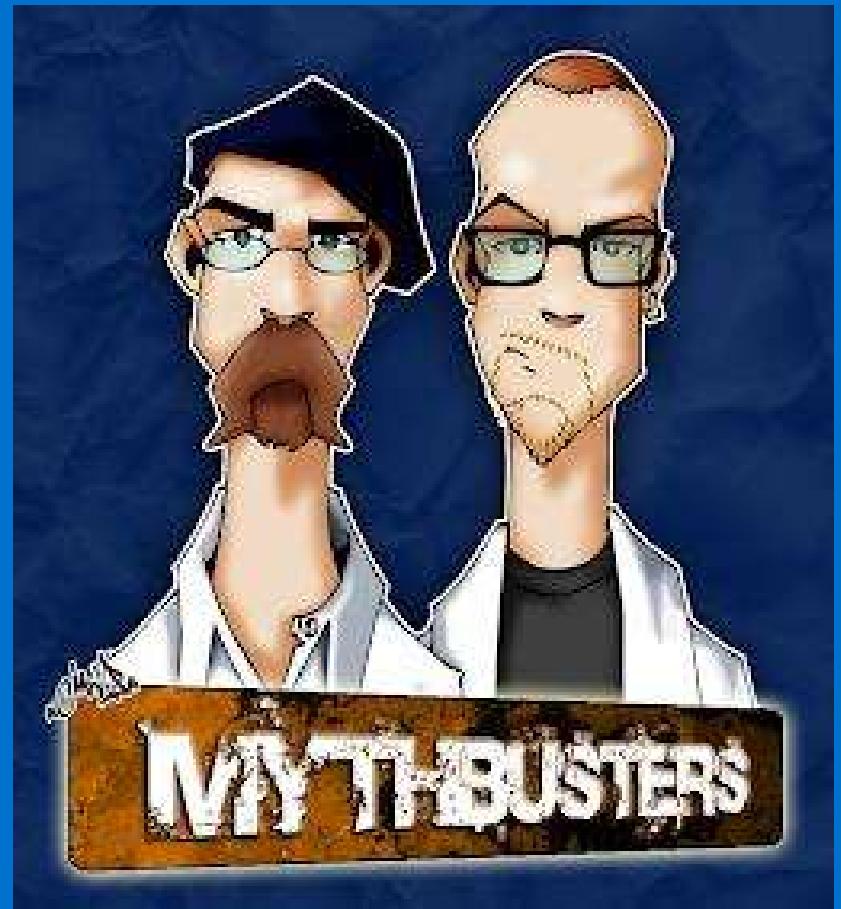
No, they'll steal *tasks*. Your people move up the value chain.

“Too small or too unique.”

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

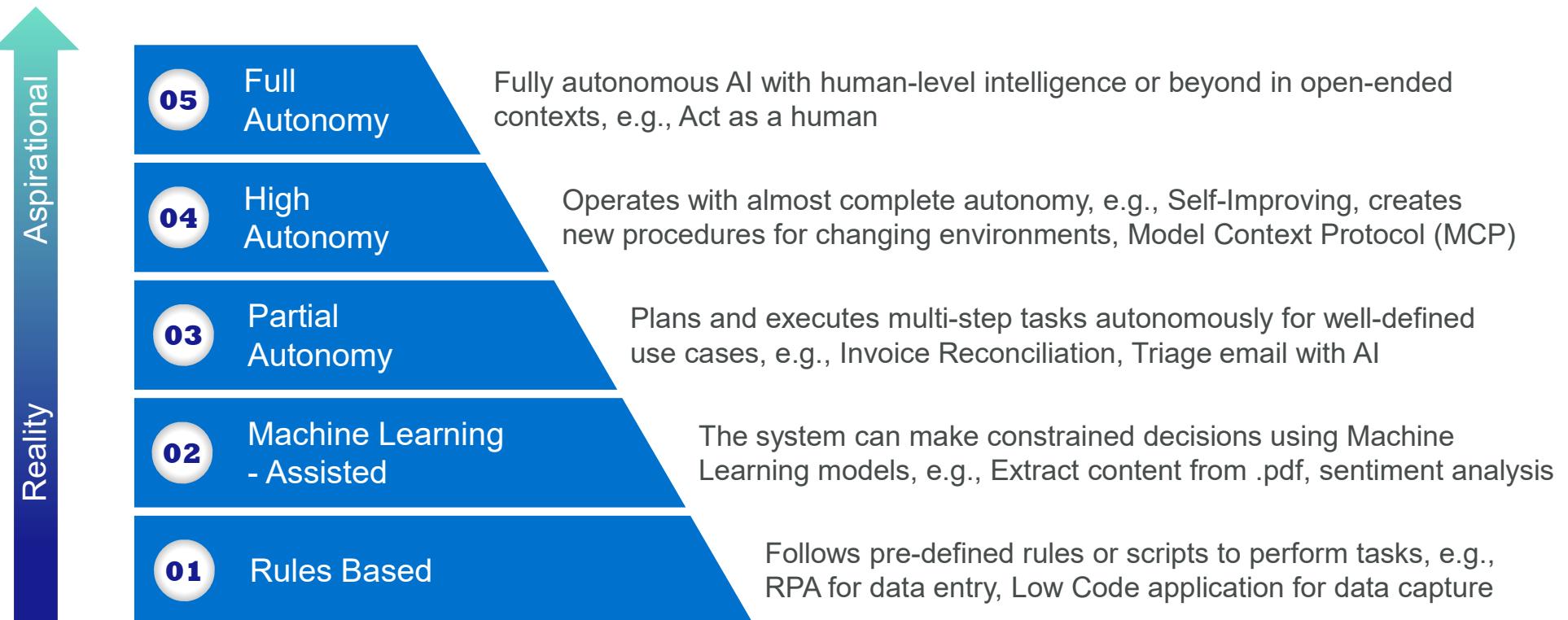
“It’s a massive IT project.”

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



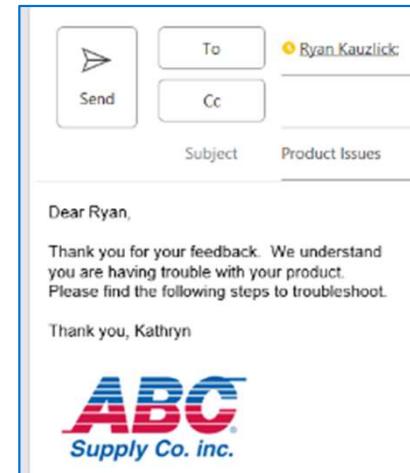
Real World Examples of Automation

AP Invoice Processing



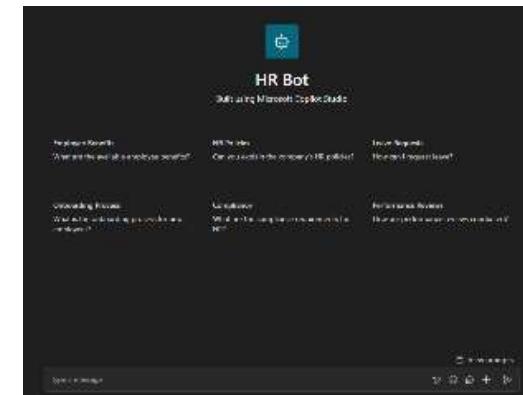
Extract invoice data

Customer Service



Respond to customer emails

HR Chatbot



Locate HR information quickly

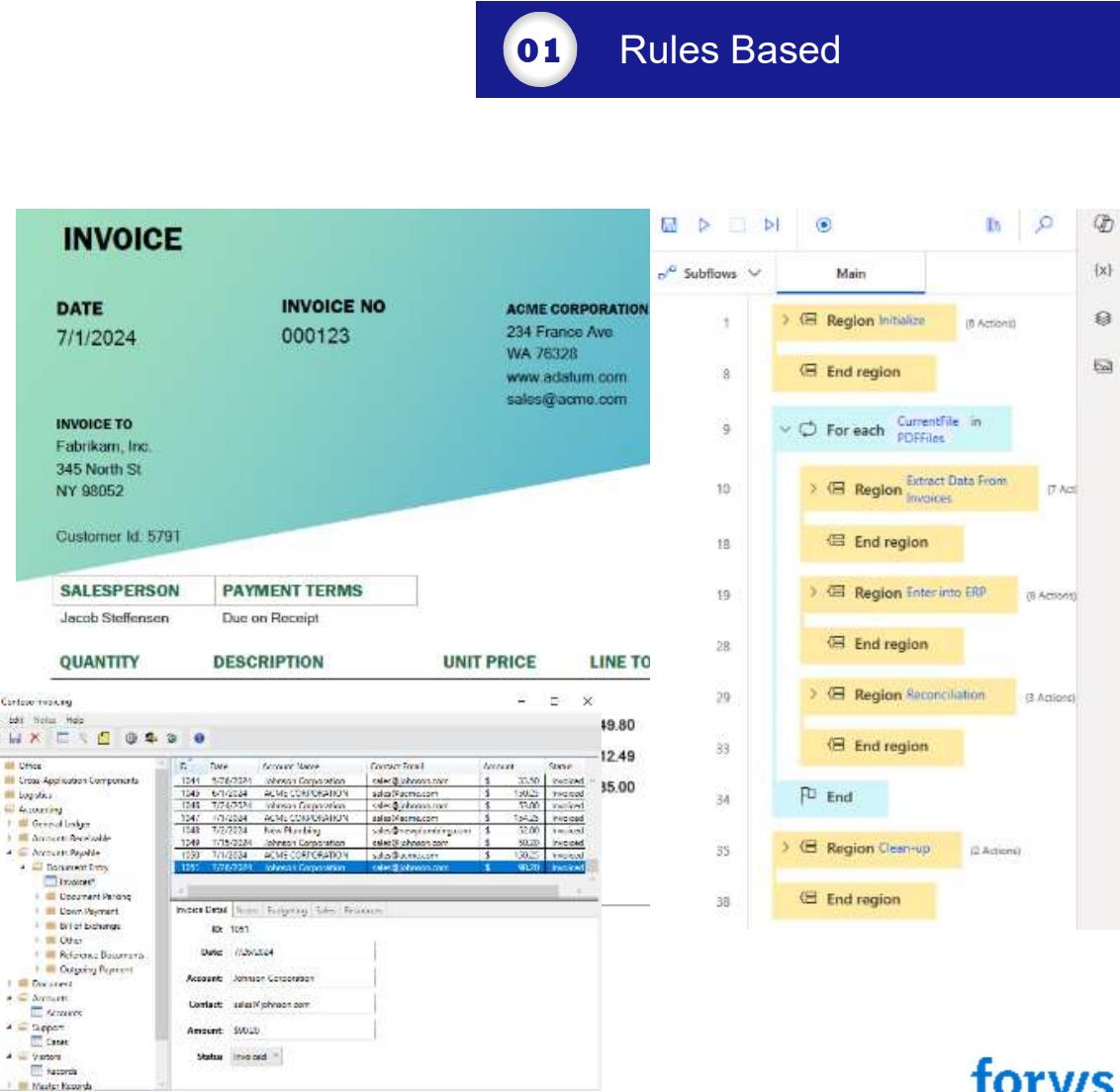
Sample Use Case

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



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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 screenshot shows a Microsoft Dynamics 365 Business Central interface. On the left, the 'Invoices' screen is displayed with a grid of invoices. The top invoice is for 'Contoso Coffee Shop' with Invoice # 1021 and a total amount of \$3,345.87. The second invoice is for 'ADATUM CORPORATION' with Invoice # 1783 and a total amount of \$90.20. Below the grid are five buttons: 'All' (blue), 'New' (purple), 'Pending Approval' (light blue), 'Approved' (green), and 'Rejected' (red). On the right, a 'Review Invoices' dialog is open for the invoice from Contoso Coffee Shop. The dialog shows the vendor details, invoice number (1021), total amount (\$3,345.87), and the date range (01/14/2019 to 01/15/2019). The dialog also displays a table of invoice items with columns for Item/Product, Qty, Unit Price, Unit Cost, and Validated. The items listed are: 'Cafe S-100 Semi-Automatic' (Qty: 20, Unit Price: \$80.33, Unit Cost: \$72.66), 'Cafe A-100 Automatic' (Qty: 5, Unit Price: \$48.75, Unit Cost: \$47.43), 'Cafe A-200 Automatic' (Qty: 15, Unit Price: \$62.35, Unit Cost: \$60.35), 'Cafe S-200 Semi-Automatic' (Qty: 3, Unit Price: \$6.97, Unit Cost: \$10.91), and 'Cafe Cotta' (Qty: 8, Unit Price: \$48.68, Unit Cost: \$46.44). At the bottom of the dialog are 'Cancel' and 'Submit for Approval' buttons. To the right of the dialog is a preview of the invoice document, showing the header information and a detailed breakdown of the items with their respective unit costs and total amounts.

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01

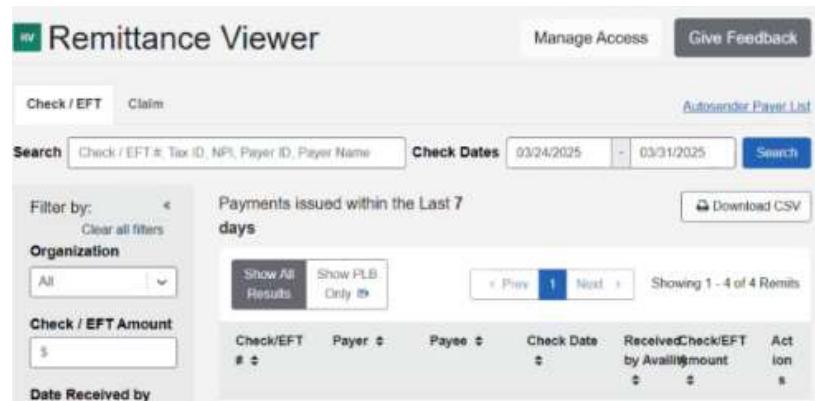
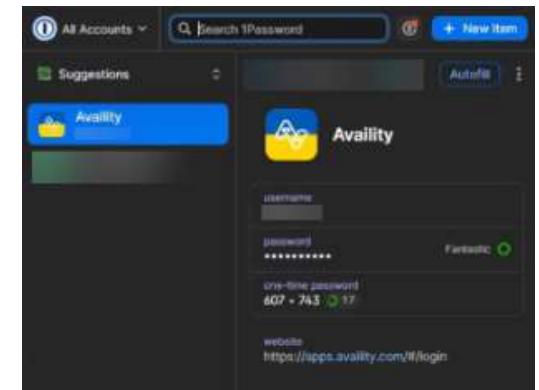
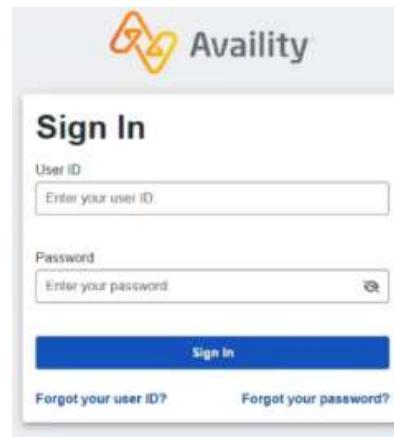
Rules Based

Sample Use Case Download Files from Web Application

Utilizing Power Automate Desktop

Requirement

The team requires the
downloading of data
from website daily.



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03

Partial Autonomy

Sample Use Case Locate HR Information Quickly

Utilizing Power Platform

Requirement

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

The screenshot displays a Microsoft Power Platform application interface. At the top, there is a card for an 'HR Bot'. The card includes a circular icon with a blue and white design, the text 'Name: HR Bot', and a 'Description' section. The 'Description' section states: '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.' Below this is an 'Instructions' section with a list of bullet points: '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.', and 'Avoid discussing topics outside the scope of Human Resources and employee benefits.' To the right of the card is a dark-themed chat interface for the 'HR Bot'. The chat interface shows a message from the bot: 'HR Bot [Hyperlink] 2:08 PM' followed by 'The travel expense policy at Contoso includes the following guidelines:'. Below this is a numbered list of 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.' At the bottom of the chat interface, there is a user message: 'What is the benefit for paternal leave?' and a bot response: '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.' The overall theme of the interface is dark with light-colored text and icons.

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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.**

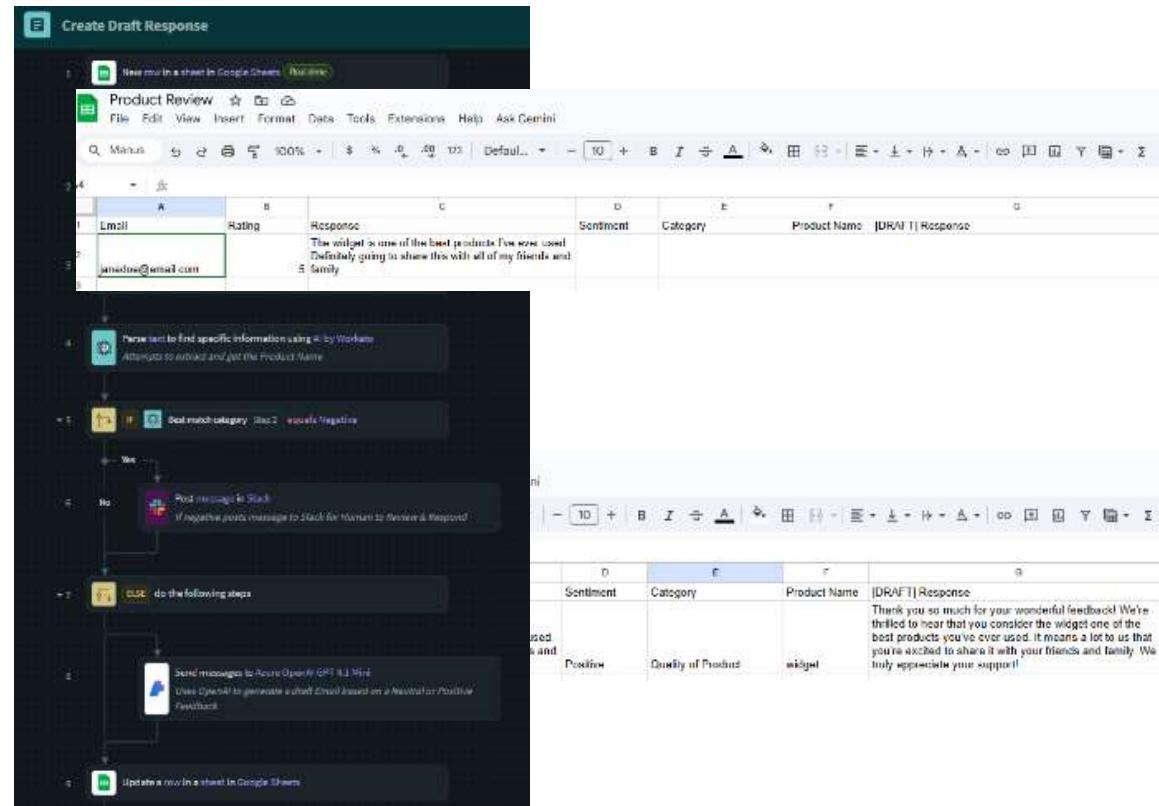
The response will create a well-formatted message body using HTML with proper line breaks. It will use the MessageId from the original email and pass that as a parameter along with the email address in the FROM of the original email. If it is a Volunteer Schedule Request, do not move the email until after the reply email has been sent.

Sample Use Case Manage Product Feedback & 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



05

Where to Start



Strategy Considerations

Making Technology Work for You



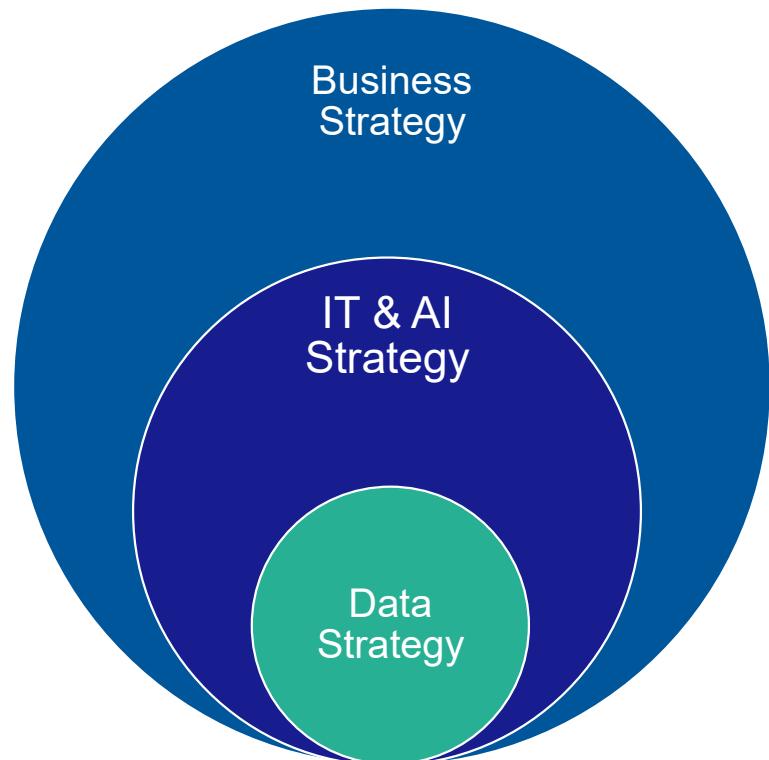
Business Strategy: Guides the direction and actions of a company to ensure sustainable growth and success in the market



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



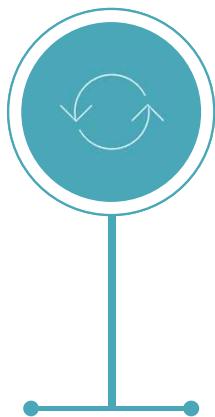
Data Strategy: Guides how data will be collected, stored, governed and used, ensuring that data supports decision-making and drives value across the organization



Identifying the Right Processes

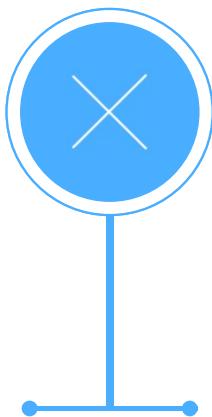
Key Considerations

Find the Right Process to Automate



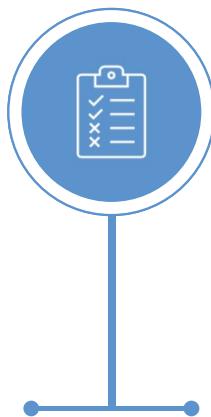
Repetitiveness

Processes that involve repetitive tasks.



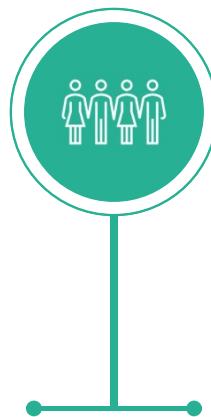
Error Prone

Process is prone to human error.



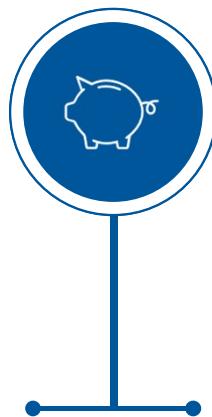
Volume

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

1. Strategize & Align

2. Prepare & Pilot

3. Implement Quick Wins

4. Operationalize Scale

5. Optimize & Transform

Innovate, explore, and prioritize

Build foundation for success

Operationalize Base Solutions

Mature Solutions & Implementation Capability

Transform Business Processes

Center of Excellence: Identify, Prioritize, Govern, Implement, Optimize

Drive quality results through right-sized process and governance

Lead through Change

Foster AI forward culture to drive adoption

Unlocking the Value of Automation & AI Start Small & Measure Value

248%

Return on investment
over three years*

01



Cost Savings

02



Hours Saved

03



Adoption

04



Employee
Engagement

Return on Investment (ROI)

Build Momentum

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

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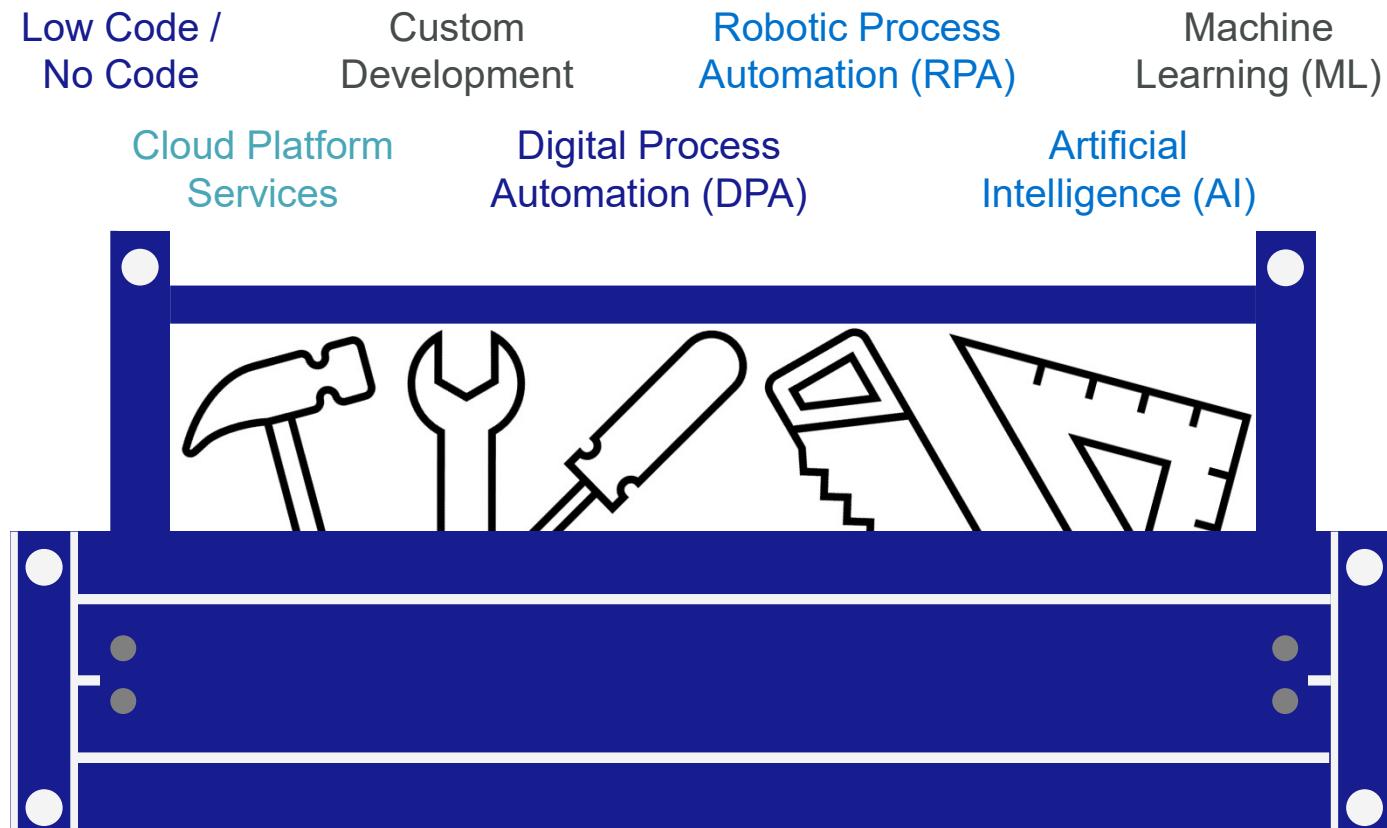
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06

Toolkit



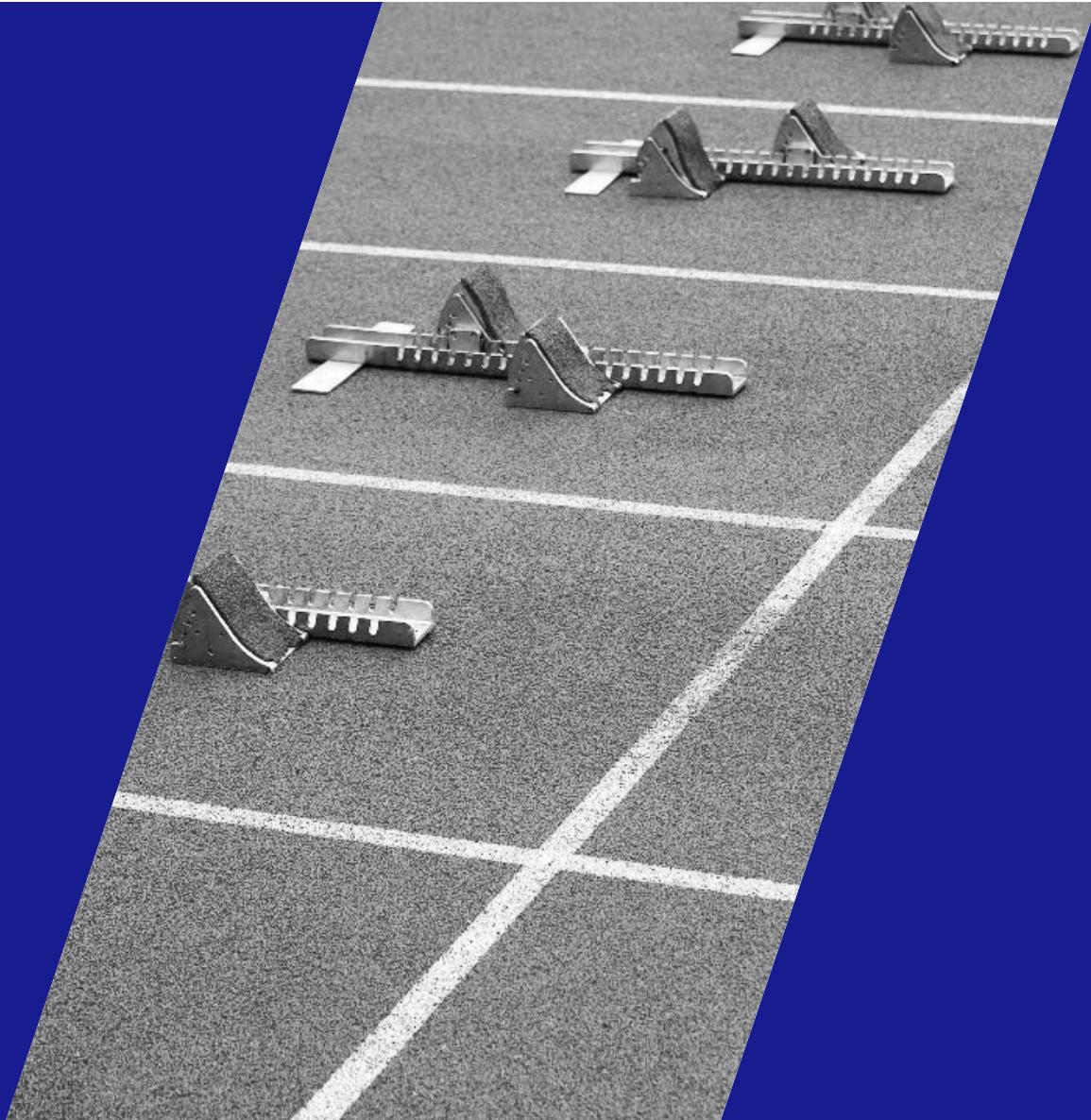
You Have a Toolbox Use the Right Tool for the Job



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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.



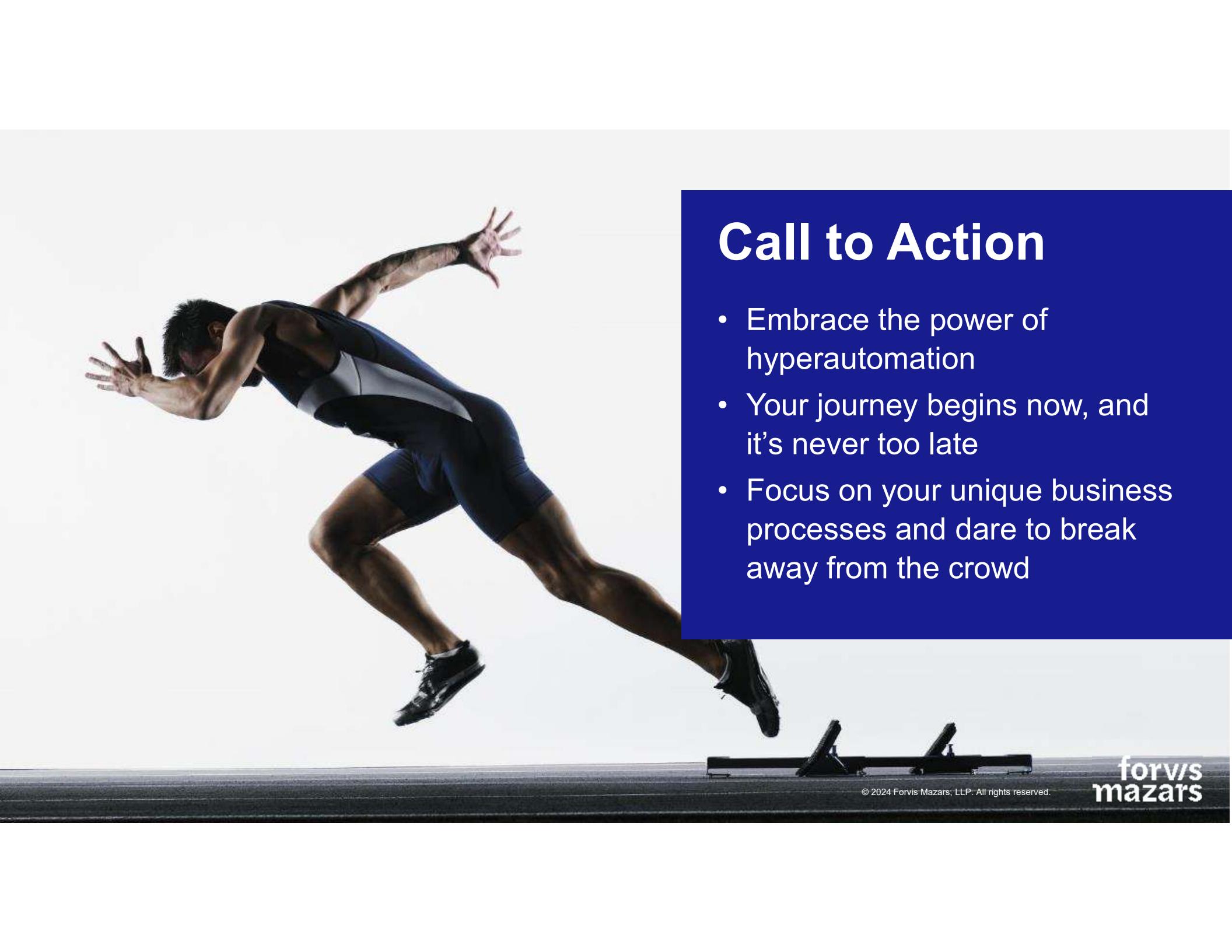
Reallocate

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.

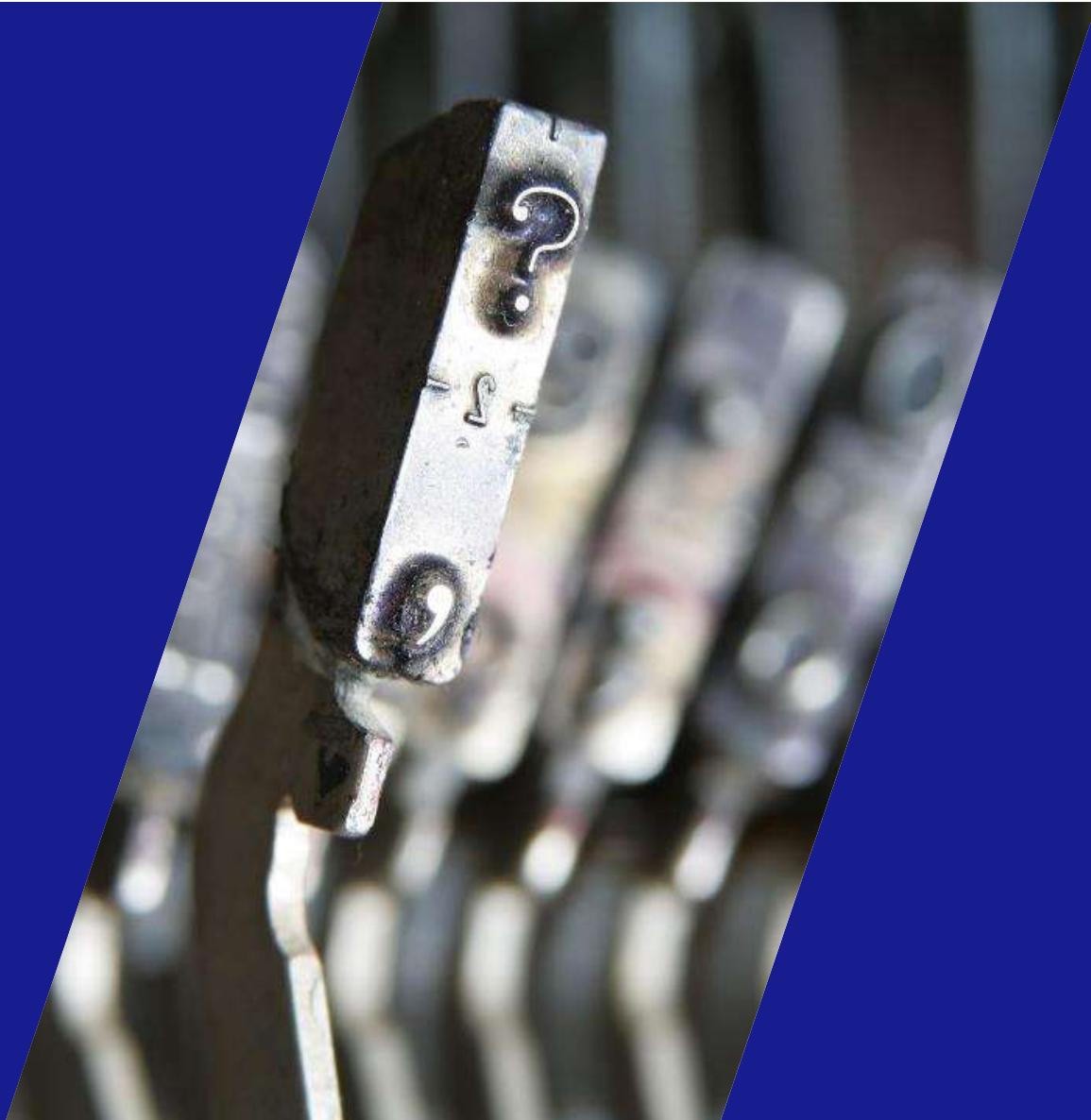


Call to Action

- 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

08

Questions & Answers





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