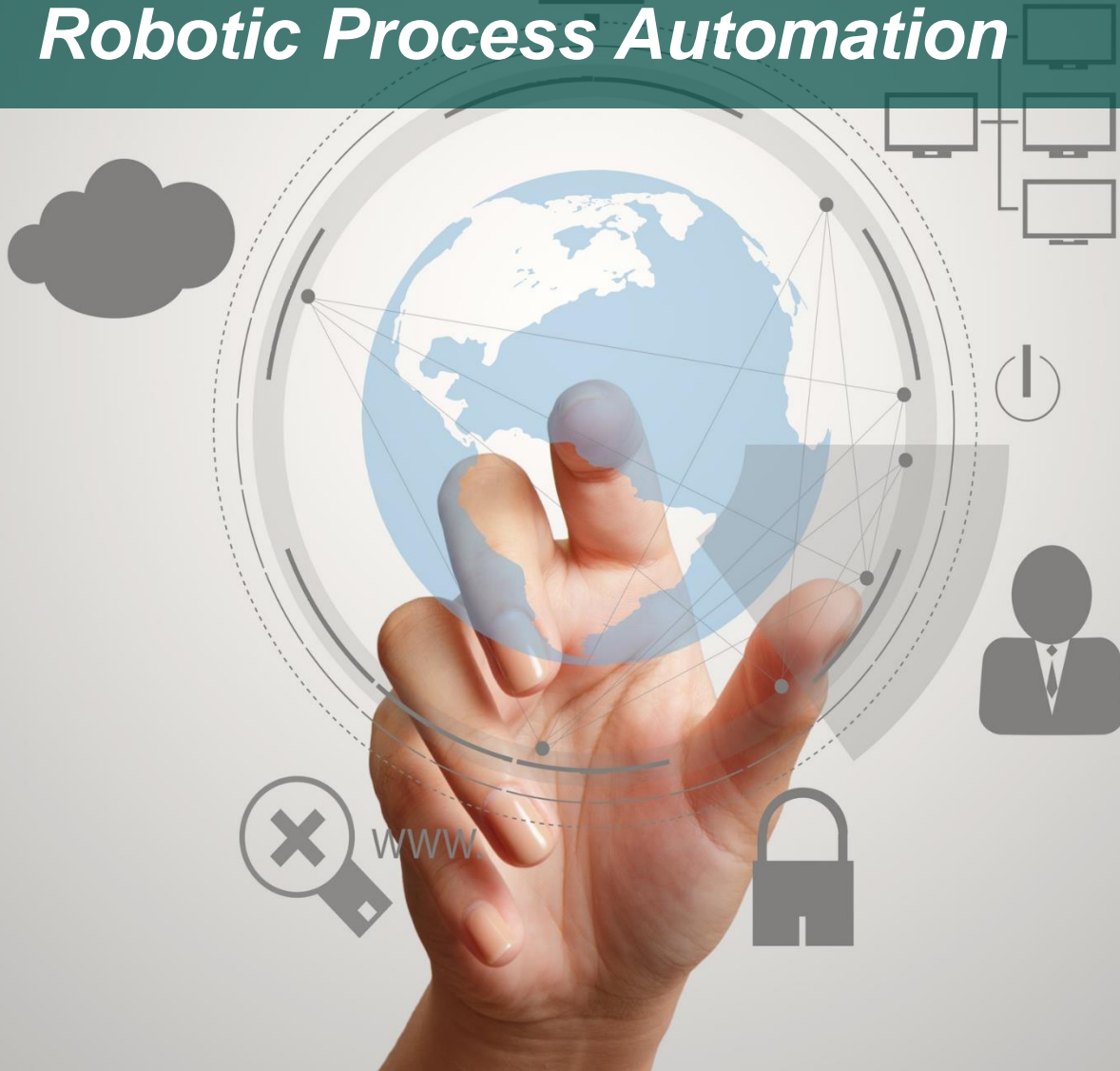


Middle Market Digital Transformation Best Practices *Robotic Process Automation*



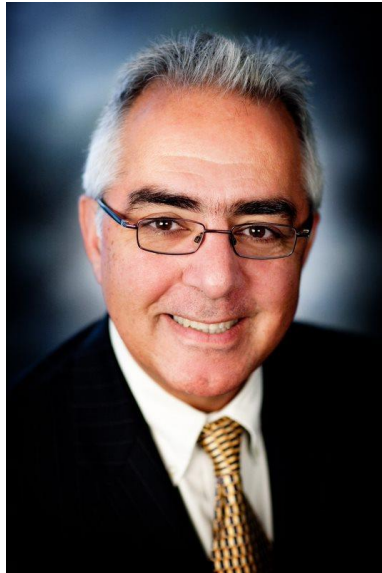
Sassan S. Hejazi
J.T. Hardy

www.kmco.com

**Kreischer
Miller**

PEOPLE | IDEAS | SOLUTIONS

On the call



Kreischer
Miller

PEOPLE | IDEAS | SOLUTIONS

Digital Transformation Journey

- Digital transformation is an effort by management to leverage the latest information technology capabilities.
 - This is done by improving and integrating business processes within the organization and with outside parties such as suppliers and customers.
- This journey is an evolutionary process, its pace is dictated by management and driven by several factors such as capabilities, resources, competitive forces and client demands.
- Digital transformation leverages latest IT tools and capabilities to improve and redefine how work is being performed, especially given today's challenges.



PEOPLE | IDEAS | SOLUTIONS

Robotic Process Automation Defined

- Many organizations have developed a patchwork of applications, with data being entered in multiple places and requests travelling via various tools ranging from manual reports and forms to emails and spreadsheets from one system to another in different ways.
- Robotic Process Automation, or as commonly referred to as RPA, democratizes automation through integration of all applications using a unified set of tools to eliminate non-value added activities while at the same time increase overall process efficiency, quality and scalability levels.
- RPA is a digital transformation realization tool enabling managers to achieve “hyper automation”, by having the ability to quickly identify business process improvement opportunities and use available tools to achieve high ROIs in a rapid and quantifiable fashion.



PEOPLE | IDEAS | SOLUTIONS

Robotic Process Automation Examples

- Accounting & Finance – Payables and receivables processes. Automated reconciliation and financial close activities.
- Operations – Customer and vendor management, inventory automation, cycle counts, order fulfillment, quality tracking, job/project setups, project budget monitoring.
- Sales & Marketing – Campaign and outreach email management, brochure and content sharing processes, CRM automation.
- H/R – Employee forms, onboarding and termination processes, benefits management support processes.
- Executive Management – Business analysis, monitoring and reporting. Risk management and regulatory compliance support.



PEOPLE | IDEAS | SOLUTIONS

Sampling of Market Leaders

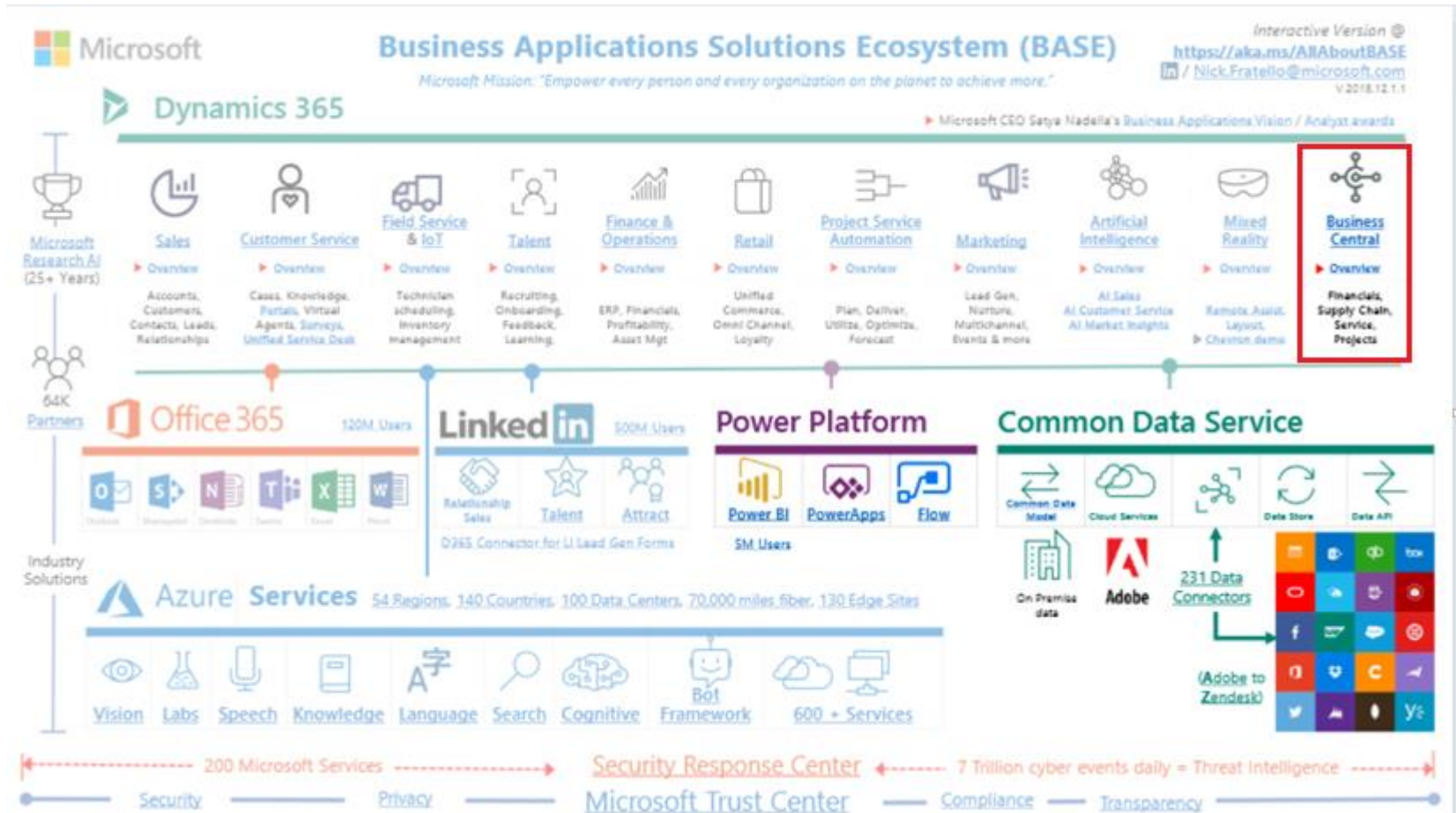


PEOPLE | IDEAS | SOLUTIONS

RPA Platform Case Study



Platform Case Study



Platform Case Study



Power Apps customer base in every industry



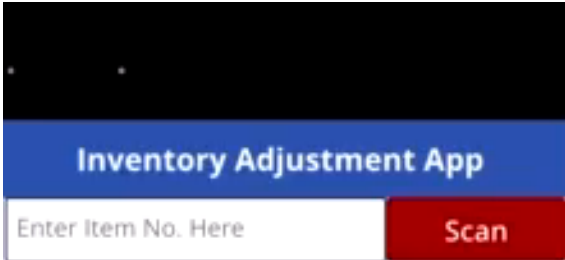
Use Case – Inventory Management

- Requirements
 - Show item availability by location
 - Ability to record item quantity counted
 - Post adjustments to the financial application

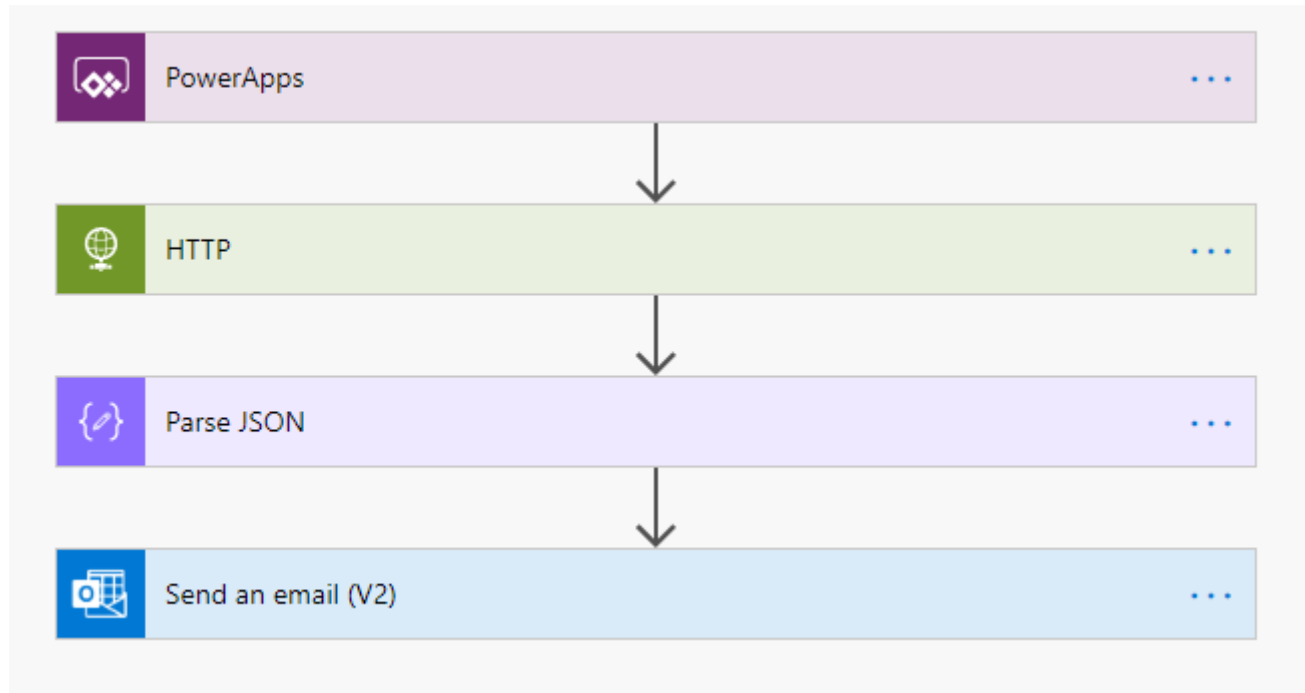


**Kreischer
Miller**

PEOPLE | IDEAS | SOLUTIONS



Use Case – Inventory Management



**Kreischer
Miller**

PEOPLE | IDEAS | SOLUTIONS

Use Case – Service Automation

<https://www.serviceautomation.org/>

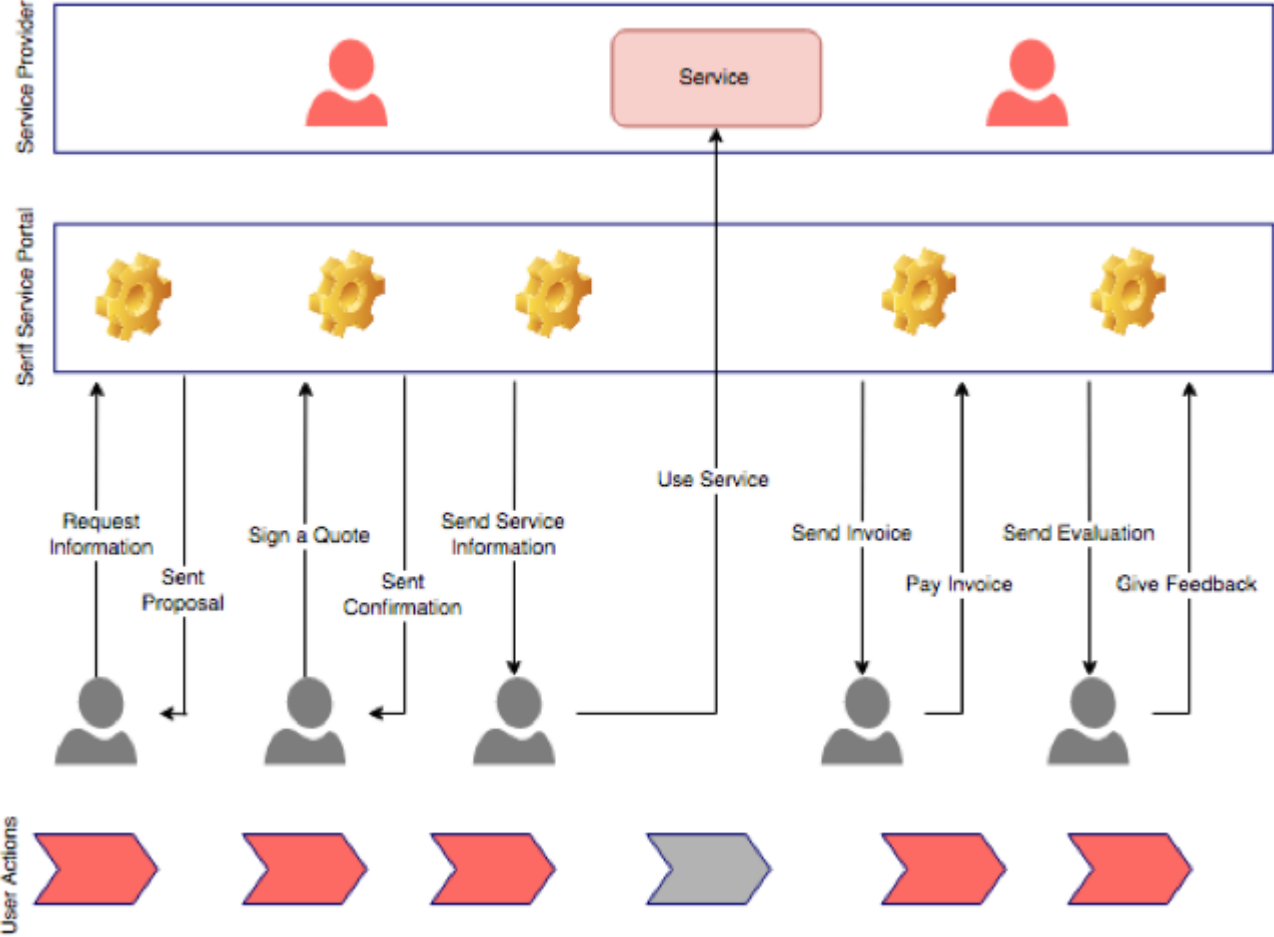
- Service Automation is the delivery of a service in a completely automated manner. Users of that service can decide when to use a specific service. All the arrangement to use that service is done through an app or portal (i.e. a self service solution).
- If the service is adequately designed, it means that you don't need to speak to anyone from the service provider.
- Key examples of companies who became very successful with Service Automation are [Uber](#) and [Netflix](#). They took a traditional service (getting from A to B or watching a TV series), and completely automated every step of that service experience.

**Kreischer
Miller**

PEOPLE | IDEAS | SOLUTIONS

Use Case – Service Automation

<https://www.serviceautomation.org/>



PEOPLE | IDEAS | SOLUTIONS

Use Case – Service Automation

- Examples
 - Support plans
 - Subscriptions
 - Ticketing
 - Appointments
 - Events
- Sign up, provisioning, invoicing



PEOPLE | IDEAS | SOLUTIONS

Kreischer Miller - Membership Sign Up

* Required

1. Name *

2. Subscription Level *

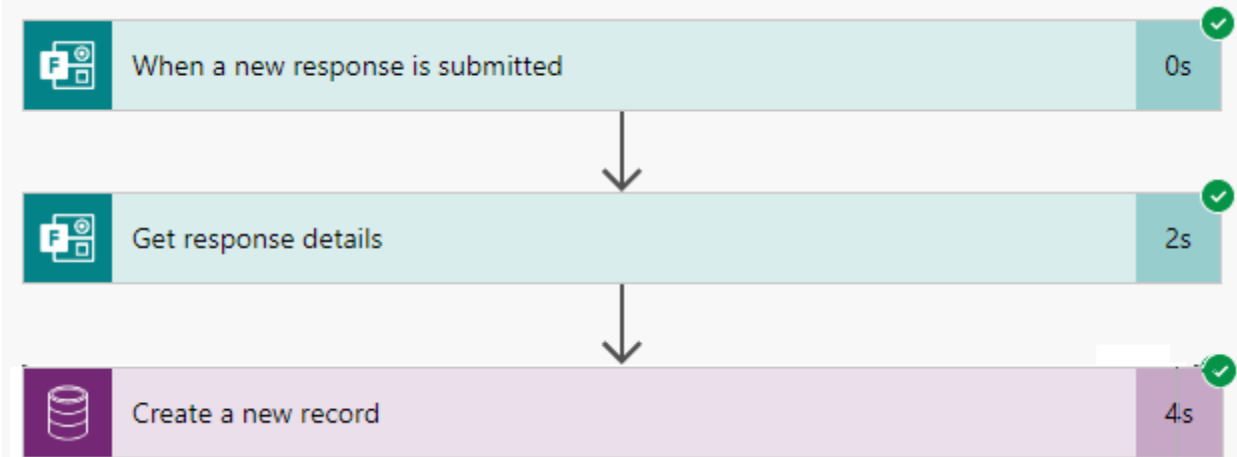
Gold

Platinum

3. Email Address *

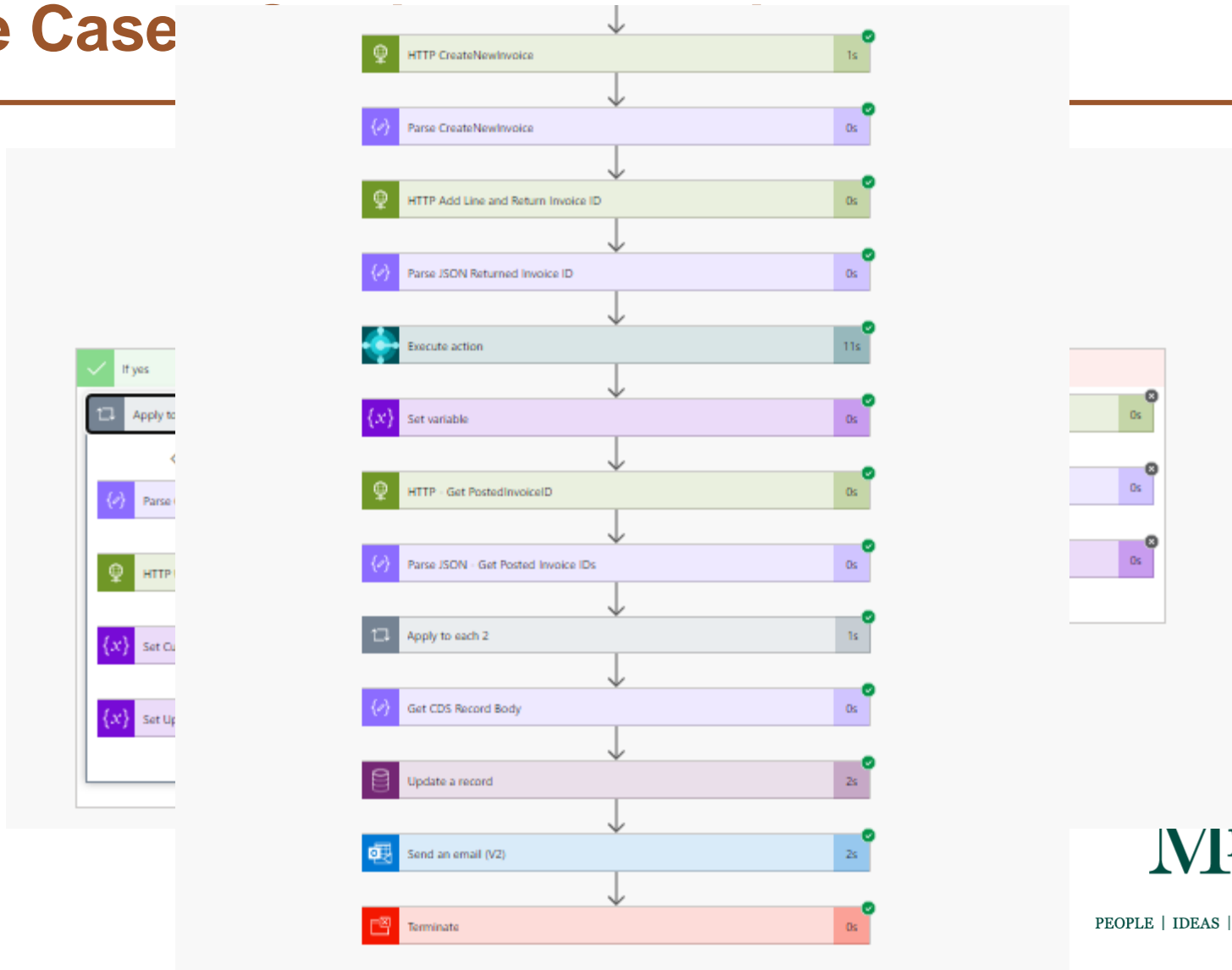
Submit

Use Case – Service Automation



PEOPLE | IDEAS | SOLUTIONS

Use Case



PEOPLE | IDEAS | SOLUTIONS

Use Case – Service Automation

Attachment Tools [EXTERNAL] CRONUS USA, Inc. - Invoice PS-INV103228 - Message (HTML)

File Message Acrobat Attachments Tell me what you want to do...

Open Quick Print Send To Save As Save All Remove Attachments Selection Copy Show Message

Actions Selection Message

Jean Thomas Hardy

[EXTERNAL] CRONUS USA, Inc. - Invoice PS-INV103228

Retention Policy KM 14 Months Permanently Delete (1 year, 2 months)

If there are problems with how this message is displayed, click here to view it in a web browser.

Sales Invoice PS-INV103228.pdf 74 KB

Document View

cronus

Your Invoice

Invoice No. PS-INV103228
Due Date 06/21/20
Total \$ 325.00

You can pay this invoice online. It's quick and easy.

Invoice PS-INV103228
May 21, 2020
Page 1 / 1

cronus

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Customer PO No. Due Date June 21, 2020 Payment Terms 1 Month/2% 8 days

Order No. Shipment Method Payment Method Bank Transfer

Shipping Agent Code Package Tracking No.

No.	Description	Shipment Date	Quantity	Unit Price Excl. Tax	Tax %	Line Amount Excl. Tax
PLATINUM	jhardy@kmco.com 5/21/2020 4:13:51 PM	05/21/20	1	325.00	0	325.00
Subtotal						325.00
Total Tax						0.00
Total \$ Incl. Tax						325.00

PayPal

Pay with PayPal (NOTE: This is a test invoice. Therefore, no actual money transfer will be made.)

Home Page Phone No. 0666-666-6666 Email

World Wide Bank IBAN GB 12 CPBK 08929965044991 SWIFT Code Giro No. 888-9999



PEOPLE | IDEAS | SOLUTIONS

Use Case – Service Automation

Power Apps CustomerSignUpManagement Customer Sign Ups > Sign Ups

Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel Import from Excel Create view

All CustomerSignUps

Search for records

SubscriptionName	ContactPerson	ContactEmail	Created On	SubscriptionLevel	SubscriptionStatus	InvoiceNumber
jhardy@kmco.com 5/21/2020 4:13:31 PM	Jean	jhardy@kmco.com	5/21/2020 12:13 PM	PLATINUM	Invoiced	PS-INV103228
shejazi@kmco.com 5/20/2020 3:59:33 PM	Sassan	shejazi@kmco.com	5/20/2020 11:59 AM	PLATINUM	Invoiced	PS-INV103227
mheckman@kmco.com 5/19/2020 1:23:55 PM	Martin Heckman	mheckman@kmco.com	5/19/2020 9:24 AM	GOLD	Invoiced	PS-INV103226
jhardy@kmco.com 5/19/2020 12:17:24 PM	Jean	jhardy@kmco.com	5/19/2020 8:17 AM	PLATINUM	Invoiced	PS-INV103224
jhardy@kmco.com 5/19/2020 1:57:29 AM	Thomas	jhardy@kmco.com	5/18/2020 9:57 PM	GOLD	Invoiced	PS-INV103223
jhardy@kmco.com 5/19/2020 1:10:32 AM	Jean	jhardy@kmco.com	5/18/2020 9:10 PM	PLATINUM	Invoiced	S-INV102260
jhardy@kmoc.com 5/18/2020 1:19:56 AM	Davis	jhardy@kmoc.com	5/17/2020 9:19 PM	GOLD	New	---
caleb@kmco.com 5/18/2020 1:07:56 AM	Caleb	caleb@kmco.com	5/17/2020 9:07 PM	PLATINUM	New	---
abe@kmco.com 5/18/2020 1:07:26 AM	Abe	abe@kmco.com	5/17/2020 9:07 PM	GOLD	New	---
julian@kmco.com 5/18/2020 12:58:50 AM	Julian	julian@kmco.com	5/17/2020 8:58 PM	GOLD	New	---
zachary@kmco.com 5/18/2020 12:54:14 AM	Zachary	zachary@kmco.com	5/17/2020 8:54 PM	PLATINUM	New	---
Julie Maintenance Plan	Julie Andrews	jhardy@kmco.com	5/17/2020 8:10 PM	GOLD	---	---

Solution Drivers/Challenges

- Recent Events – Realization that we need the ability to work from anywhere at anytime with ease.
- Industry Realities – Competitive pressures and customer expectations for product and service pricing and delivery capabilities.
- Managerial Priorities – Executive leadership’s view on priorities and allocation of needed resources, cost reductions and value maximization.
- Technology Development – Emergence of a wide variety tools offering opportunities for experimentation and achieving high ROI.



PEOPLE | IDEAS | SOLUTIONS

RPA Transformation Rewards

- Operational Agility – Ability to adjust and scale to changing conditions in a rapid response manner.
- Lowered Transaction Costs – Tightly integrated systems offer increased process efficiencies.
- Improved Decision Making – Data becomes more of a digital asset; easier to slice and dice and view/monitor by dashboards.
- Increased Customer Satisfaction – Customers appreciate high quality and quick response interaction processes.
- Improved Risk Posture – Reducing risks through leveraging automated mechanisms.



PEOPLE | IDEAS | SOLUTIONS

Getting Started with RPA

- Potential paths to leveraging RPA varies from one organization to another:
 - One size does not fit all!
 - Approach could differ from one organization to another
 - Industry and competitive dynamics considerations
- Conduct a “complimentary” discovery meeting/discussion of business realities, priorities, high level systems/processes to identify potential RPA enabled digital transformation solution opportunities.



PEOPLE | IDEAS | SOLUTIONS

Thank You for Attending!



Sassan S. Hejazi
Director, Technology Solutions Group
shejazi@kmco.com
215.734.0803



J.T. Hardy
Manager, Technology Solutions Group
jhardy@kmco.com
215.734.0876



























PEOPLE | IDEAS | SOLUTIONS

Platform Case Study



Office 365 All Apps Tips and Tricks

- | | | | |
|---|--|--|---|
|  <p>Calendar
Schedule and share meeting and e...</p> |  <p>Delve
Get personal insights and relevant ...</p> |  <p>Dynamics 365
Break down the silos between you...</p> |  <p>Excel
Discover and connect to data, mo...</p> |
|  <p>Forms
Create surveys, quizzes, and polls ...</p> |  <p>MyAnalytics
Create better work habits with insi...</p> |  <p>OneDrive
Store, access, and share your files i...</p> |  <p>OneNote
Capture and organize your notes a...</p> |
|  <p>Outlook
Business-class email through a rich...</p> |  <p>People
Organize your contact info for all y...</p> |  <p>Planner
Create plans, organize and assign t...</p> |  <p>Power Apps
Build mobile and web apps with th...</p> |
|  <p>Power Automate
Create workflows between your ap...</p> |  <p>Power BI
Create actionable, dynamic, and e...</p> |  <p>PowerPoint
Design professional presentations.</p> |  <p>SharePoint
Share and manage content, knowl...</p> |
|  <p>Stream
Share videos of classes, meetings, ...</p> |  <p>Sway
Create and share interactive report...</p> |  <p>Tasks
Create and manage tasks in Outlo...</p> |  <p>Teams
The customizable, chat-based tea...</p> |
|  <p>To Do
Manage, prioritize, and complete t...</p> |  <p>Video
Share videos of classes, meetings, ...</p> |  <p>Whiteboard
Ideate and collaborate on a freefor...</p> |  <p>Word
Bring out your best writing.</p> |

Microsoft Strategic Position



FORRESTER RESEARCH

THE FORRESTER WAVE™

Low-Code Development Platforms For AD&D Professionals

Q1 2019

