



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Unlocking Potential in Associations

Foundational Steps to Digital Transformation with AI

December 12, 2024



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What is Digital?



Platforms

Your technology ecosystem. The “tech stack” that the organization operates off. The idea is that you adopt, integrate, and optimize digital platforms to enhance operational efficiency and achieve strategic objectives.



Data/AI and Automations

The information, insights, and technology enhanced processes that sit in between and inside of the platforms. We should leverage advanced analytics, artificial intelligence, and automated processes to drive data-driven decision-making and operational efficiency.



Cybersecurity

Protecting digital systems, networks, and data from unauthorized access and attacks. A combination of technologies, processes, and policies to safeguard sensitive information. Effective cybersecurity measures are essential to mitigate risks.



Getting us all on the same page about what is available to help advance our mission.



Polling Question



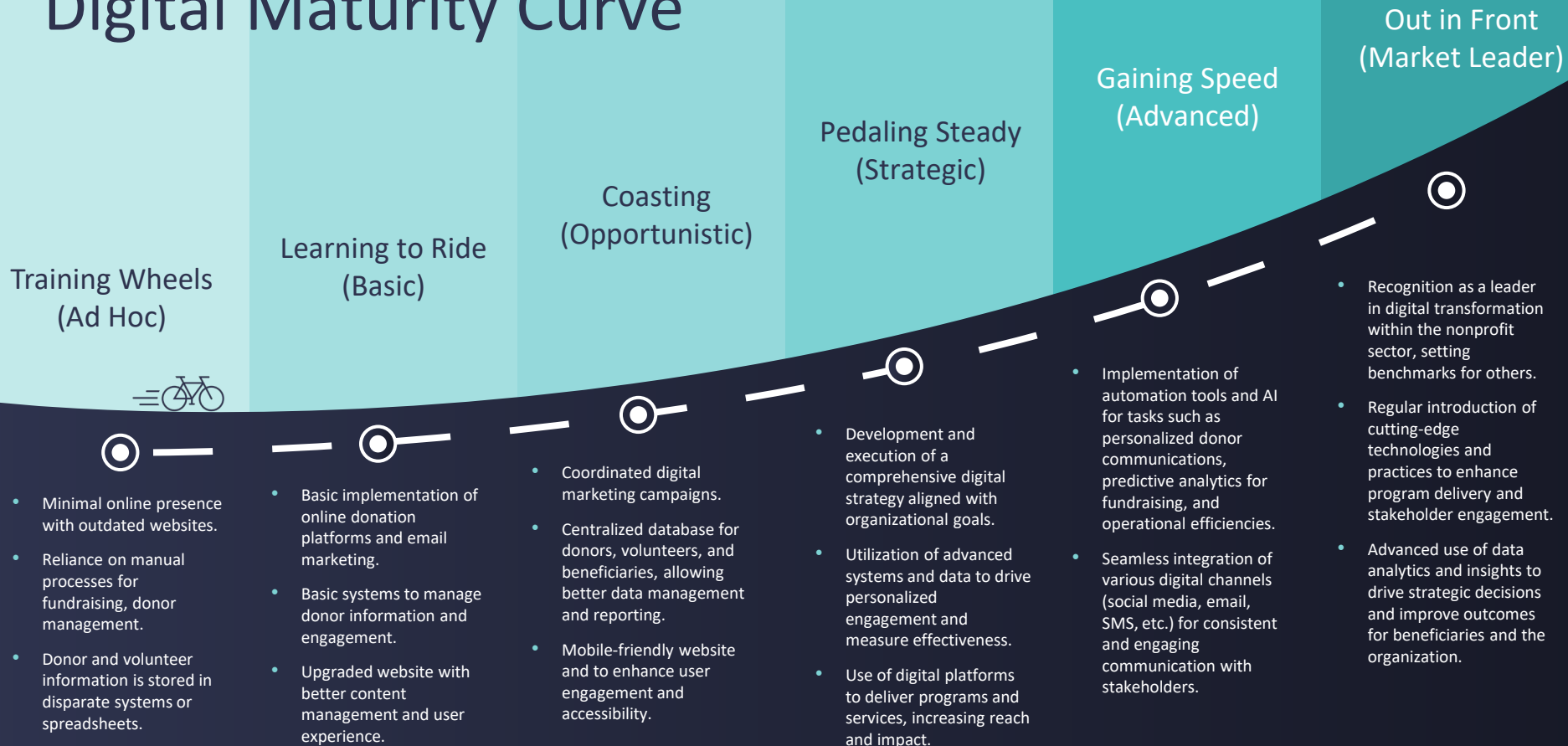
What area of your association do you think AI will have the *highest value*?

- a. Operational efficiency
- b. Impact measurement
- c. Member engagement and retention
- d. Other

Digital Maturity Curve



Digital Maturity Curve



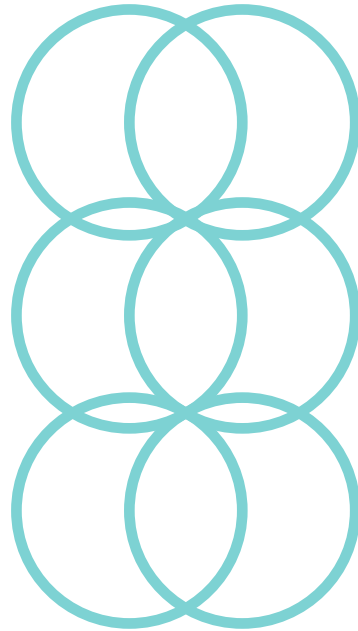
Benefits Gained from Using AI

Efficiency

- Automate repetitive tasks to save time
- Streamline workflows for faster processes

Accuracy

- Reduce human errors in data entry and analysis
- Confirm consistent and reliable outputs



Capabilities

- Enhance with data-driven insights
- Implement innovative solutions to meet member needs

Employee Satisfaction

- Reallocate workload by automating mundane tasks
- Upskill and enable staff to focus on higher-value activities



Misconceptions

Talent, Automation, and AI



Replace human
jobs



Solution vs.
tool



Fully
autonomous



Large scale and
complex
implementations



AP Automation

CONTOSO LTD. **INVOICE**

Contoso Headquarters
123 456th St
New York, NY, 10001

Microsoft Corp
123 Other St,
Redmond WA, 98052

BILL TO:
Microsoft Finance
123 Bill St,
Redmond WA, 98052

SHIP TO:
Microsoft Delivery
123 Ship St,
Redmond WA, 98052

SERVICE ADDRESS:
Microsoft Services
123 Service St,
Redmond WA, 98052

INVOICE: INV-100
INVOICE DATE: 11/15/2019
DUE DATE: 12/15/2019
CUSTOMER NAME: MICROSOFT CORPORATION
SERVICE PERIOD: 10/14/2019 – 11/14/2019
CUSTOMER ID: CID-12345

| SALESPERSON | P.O. NUMBER | REQUISITIONER | SHIPPED VIA | F.O.B. POINT | TERMS |
|-------------|-------------|---------------|-------------|--------------|-------|
| | PO-3333 | | | | |

| DATE | ITEM CODE | DESCRIPTION | QTY | UM | PRICE | TAX | AMOUNT |
|----------|-----------|---------------------|-----|-------|---------|--------|---------|
| 3/4/2021 | A123 | Consulting Services | 2 | hours | \$30.00 | \$6.00 | \$60.00 |
| 3/5/2021 | B456 | Document Fee | 3 | | \$10.00 | \$3.00 | \$30.00 |
| 3/6/2021 | C789 | Printing Fee | 10 | pages | \$1.00 | \$1.00 | \$10.00 |

| | |
|-------------------------|----------|
| SUBTOTAL | \$100.00 |
| SALES TAX | \$10.00 |
| TOTAL | \$110.00 |
| PREVIOUS UNPAID BALANCE | \$500.00 |
| AMOUNT DUE | \$610.00 |

THANK YOU FOR YOUR BUSINESS!

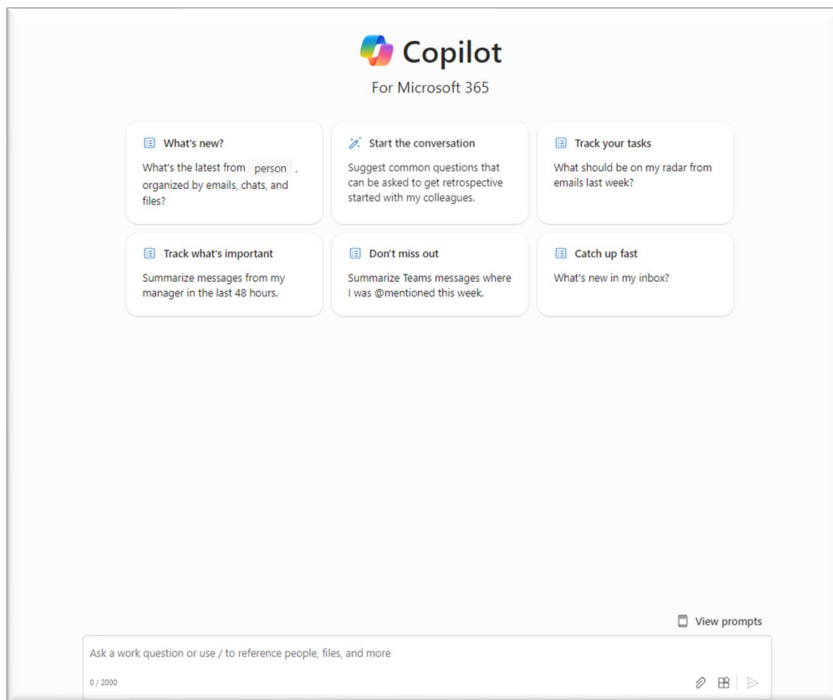
REMIT TO:
Contoso Billing
123 Remit St
New York, NY, 10001

- Reduce manual data entry from documents such as invoices
- Minimize error associated with manual processing
- Integrate with existing workflow and enterprise systems including accounting systems

Reduction in manual invoice processing time by up to 90%



Microsoft 365 Copilot

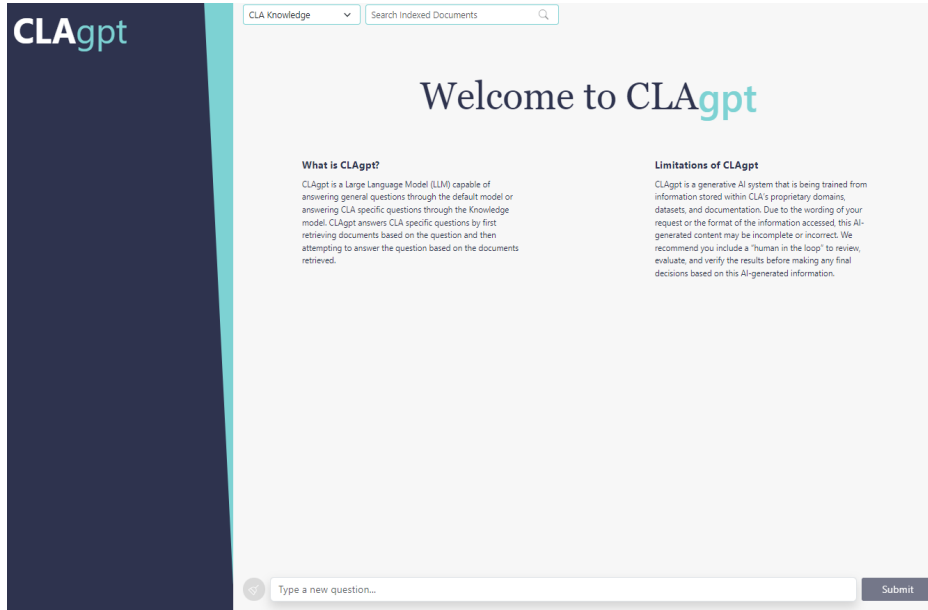


- AI-powered assistant integrated into Microsoft 365 applications
- Helps automate tasks, provide insights, and enhance productivity
- Available in applications like Word, Excel, Outlook, Teams and more

Customizable through Copilot Studio within Microsoft's ecosystem



Large Language Models - GPT



- Enhancing human potential and productivity
- Powerful and intuitive search for accurate and timely data retrieval
- Efficiency driving personal assistance

Generative AI is transforming the daily work experience





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