TECH ENABLED TRANSFORMATION

THROUGH DATA STRATEGY, AUTOMATION, & AI

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MorganFranklin Consulting A Vaco Company | vaco

INTRODUCTIONS

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LEARNING OBJECTIVES

This session offers a foundational understanding of Data Strategy, Automation, and Artificial Intelligence (AI) and its transformative role in the business world, particularly within Finance and Accounting. Participants will explore the basics of data foundations and tech-enabled solutions, including key concepts and technologies that drive applications today:

AFTER COMPLETING THIS COURSE, YOU WILL UNDERSTAND:

- Identify key concepts and their applications in business.
- Recognize the potential of data and tech-enablement to transform finance and accounting operations.
- Understand the risks and limitations.
- Gain hands-on exposure with a guided demonstration.

AGENDA

- DATA FOUNDATIONS
- AUTOMATION & ARTIFICIAL INTELLIGENCE (AI) OVERVIEW
- FINANCE & ACCOUNTING APPLICATION
- RISKS & LIMITATIONS
- READINESS
- DEMONSTRATION
- Q&A

Data Foundations

DATA FOUNDATIONS

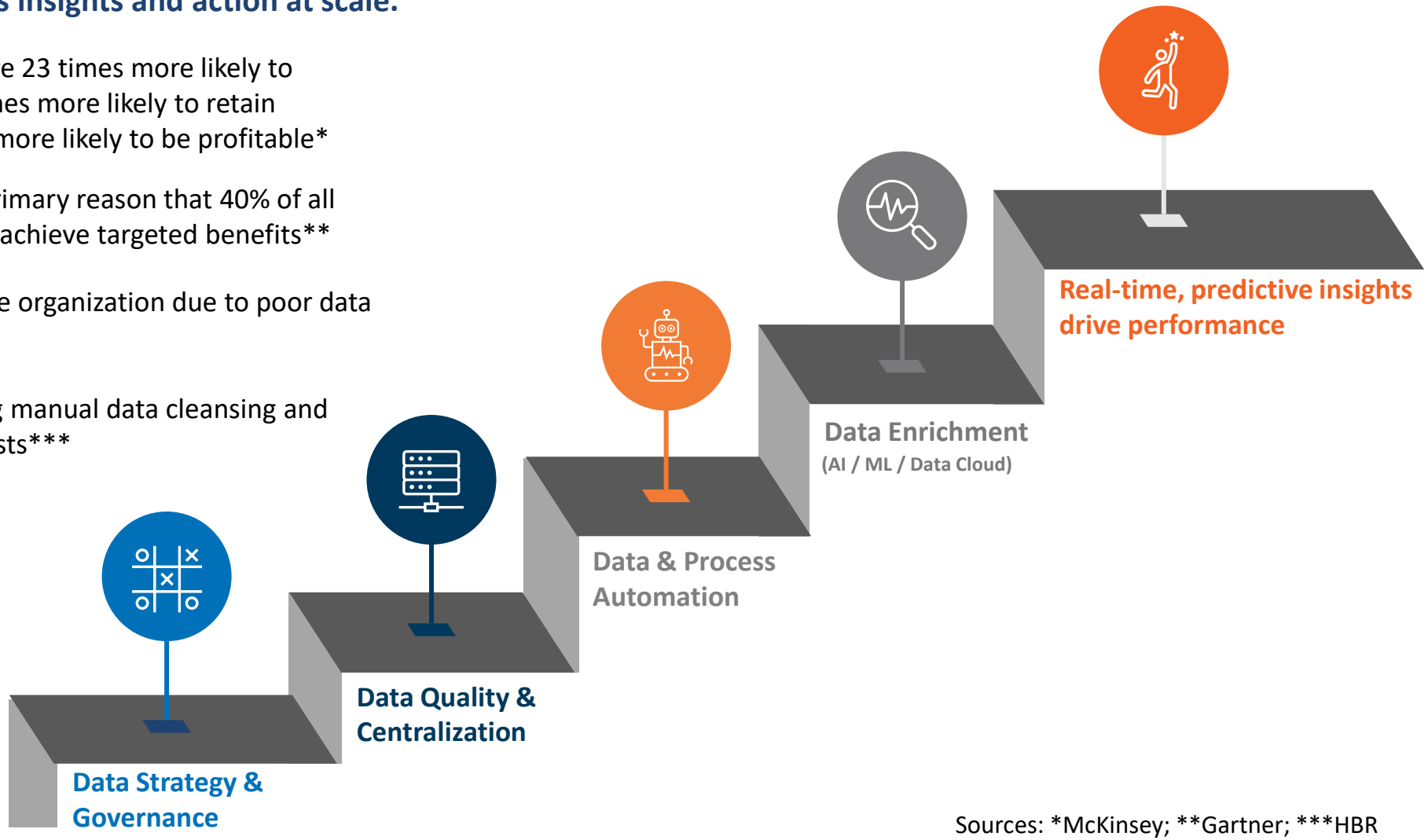
Establishing a strong foundation ensures reliable, high-quality data for deriving strategic insights, successful adoption of technology, and drives meaningful business insights and action at scale.

23x Data-driven companies are 23 times more likely to acquire customers, six times more likely to retain customers, and 19 times more likely to be profitable*

40% Poor data quality is the primary reason that 40% of all business initiatives fail to achieve targeted benefits**

$15M Yearly losses to an average organization due to poor data quality **

60% Time saved by eliminating manual data cleansing and organizing by data scientists***



Sources: *McKinsey; **Gartner; ***HBR

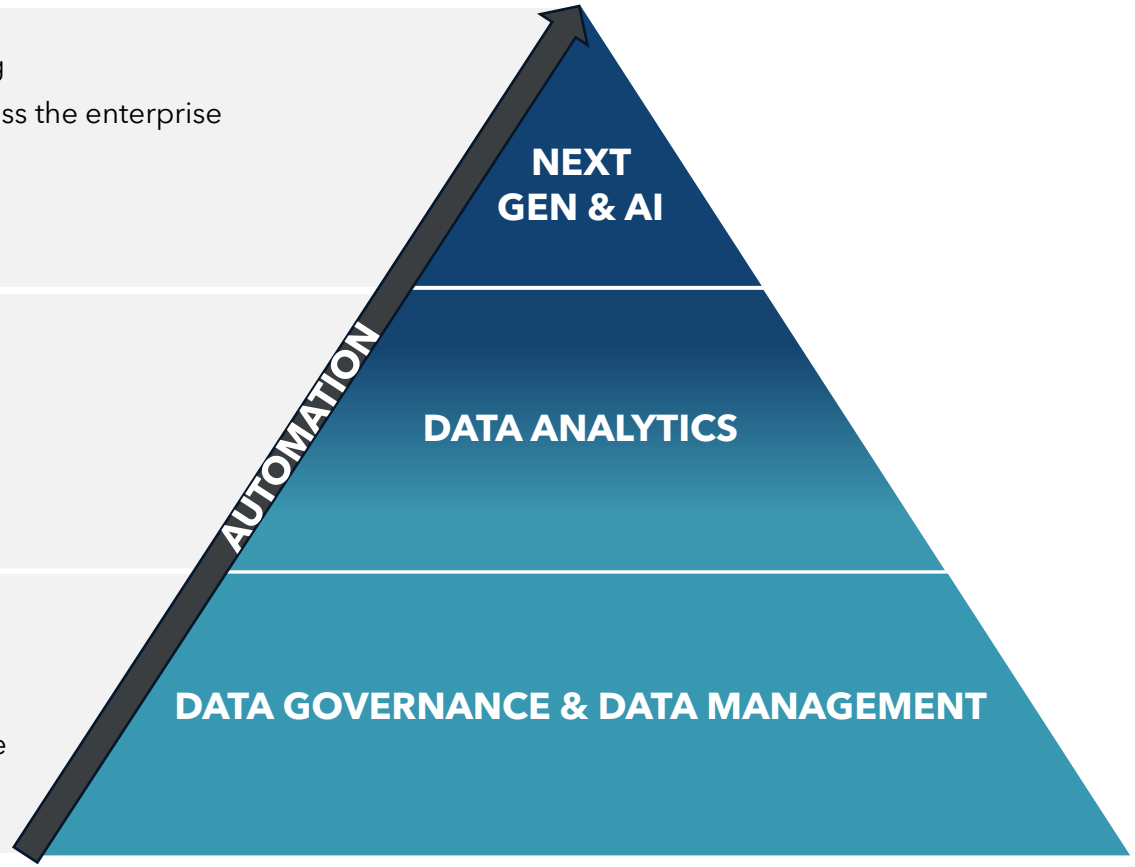
DATA MATURITY

Data Governance and Data Management are foundational across business processes and can enable higher-level functionality including improving reporting and analytics and incorporating Next Gen & AI to enhance efficiency and insights.

- Enhanced data insights and accuracy through AI and machine learning
- Automatic triggers of real-time actions and improved compliance across the enterprise
- Improved customer and supplier relationship management

- Analytics to view relevant data for business decisions
- Relevant metrics, OKRs, and KPIs to streamline business decisions
- Meaningful reports and analyses to drive the business

- Defined Critical Data Elements (CDEs) traced back to source systems through data lineage
- Data quality framework with cleansed master data
- Integrated disparate systems and siloed data to create a Single Source of Truth
- Data culture with data dictionary to standardize data literacy



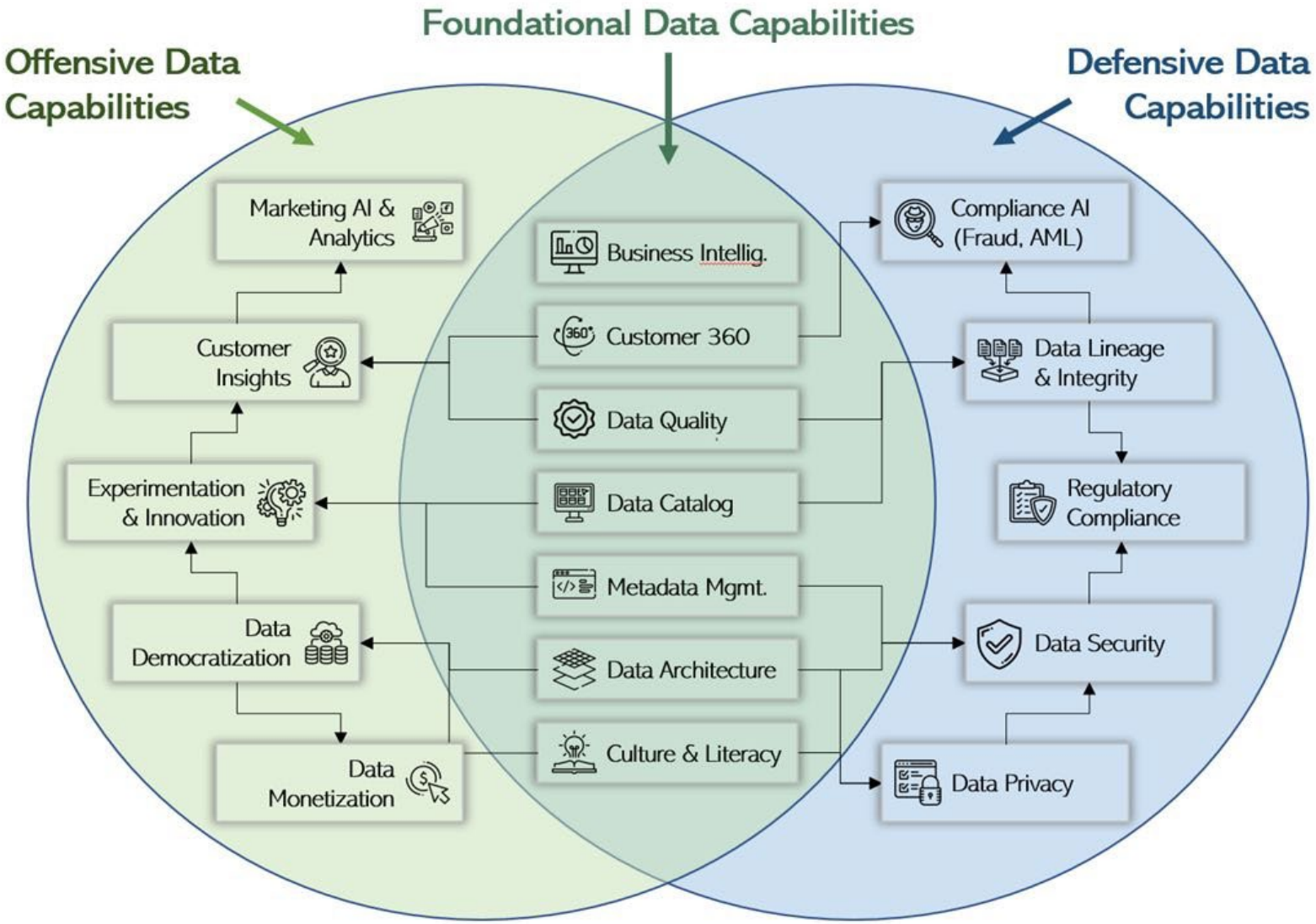
Focused End-to-End Finance Process Examples:

- **Record-to-Report**
- **Plan-to-Perform**
- **Procure-to-Pay**
- **Order-to-Cash**

INDUSTRY PERSPECTIVES

Common Problems	Key Capabilities	Business Outcomes
"I don't have an accurate, 360-view of the key data needed, nor do I know which definitions to use to make decisions."	**Governance & Master Data Management (MDM)**	**Empower teams to "speak the same language"** • Actively manage data lineage and critical data elements • Establish a scalable data environment and observability
"We have so many different systems, but data across them all is often inconsistent, missing, or incorrect."	**Enriched Data Quality**	**Timely, accurate, and conforming data – no rework** • Build and continuously monitor data quality dashboards • Data Quality Issue Resolution Framework
"Our data is saved in various Excel files and operational systems, so each team relies on their own different 'source of truth' for reporting purposes."	**Data Centralization (Data Warehouse)**	**Unify data – One Version of Truth** • Connect disparate source systems to target system • Drive reporting off data warehouse, not operational systems
"My team spends weeks manually wrangling data in Excel. It takes us so long to pull together data for our reports that we don't even have time to analyze and act on our findings."	**Process Optimization, Automation & AI**	**Less time wrangling, and more time analyzing** • Streamline and optimize highly manual processes for automation • Develop reusable assets
"We have 100+ reports, but don't even know which metrics are correct to use for decision making."	**Proactive Analytics & Insights (Metrics that Matter)**	**Drive your business with data** • Streamline reporting and real-time BI / visualization capabilities • Develop predictive analytics and insights
"I'm sure there are ways to help me get out of Excel and better use the data to work more efficiently, but what does that look like?"	**Data Literacy & Culture**	**Data Democratization** • Establish clear policy & procedures and roles & responsibilities • Self-service analytics, and citizen development

FOUNDATIONAL DATA CAPABILITIES



AUTOMATION & ARTIFICIAL INTELLIGENCE (AI) OVERVIEW

COMMON AUTOMATION & AI MYTHS

Automation & AI are coming to take my job

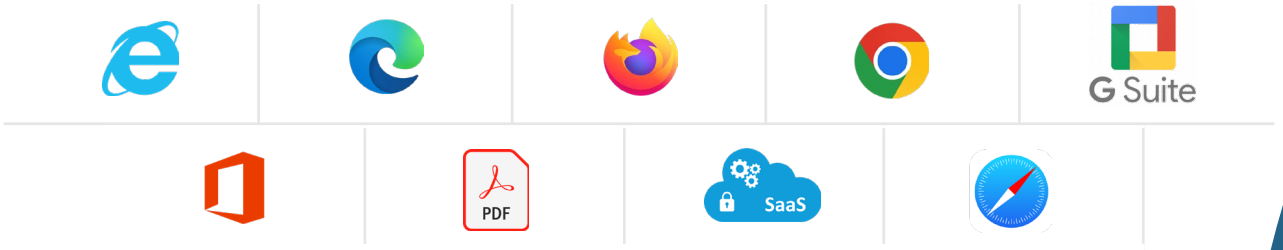
Automation & AI are a "Fix All" Silver Bullet

AI and robots are the same thing

AI won't affect my industry

TYPES OF AUTOMATION OVERVIEW

ARTIFICIAL INTELLIGENCE (AI) + PROCESS AUTOMATION = INTELLIGENT AUTOMATION



CONNECT TO SYSTEM APIs

CONNECT THROUGH USER INTERFACE

MAKE CALCULATIONS

COPY & PASTE DATA

LOG INTO APPLICATIONS

READ & WRITE TO WEBSITES, DATABASES, & FORMS

SCRAPE DATA FROM THE WEB

MOVE FILES & FOLDERS

OPEN EMAILS & ATTACHMENTS

EXTRACT CONTENT FROM DOCUMENTS, PDFS & FORMS

NAVIGATE BROWSER & APPLICATIONS

QUERY & CONSUME DATA FROM DATABASE

WHY USE AUTOMATION?

- Increased speed, accuracy, and throughput
- Improved compliance
- Available 24x7
- Work unattended during off hours
- Fewer human errors
- Replace repetitive manual work
- Free staff to spend more time on valued added activities
- Solution for one-time or long-term business problems

Automations work just like people, performing manual repetitive tasks using the same tools, applications, and data, only with less errors and no fatigue

PROCESS AUTOMATION OVERVIEW

WHAT ANALYTIC PROCESS AUTOMATION (APA) AUTOMATES BEST

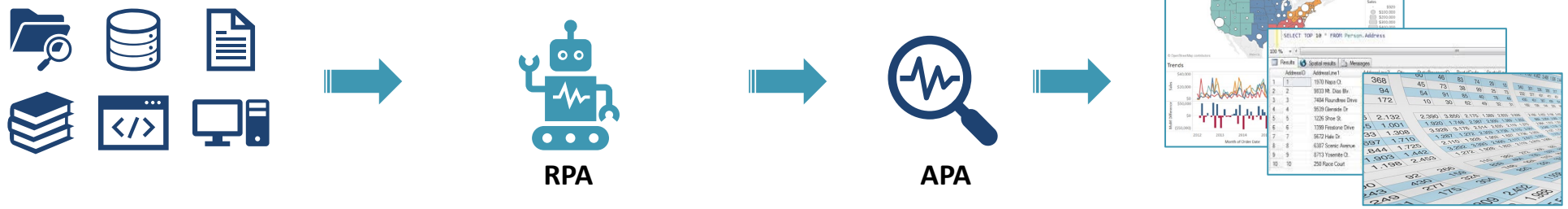
- Import / Export from structured data sources and desktops
- Data Transformations, Data Cleansing; Data Validation and Data Quality Checks
- Machine Learning and Data Modelling Processes
- Statistical and Geographical Analysis

WHAT ROBOTIC PROCESS AUTOMATION (RPA) AUTOMATES BEST

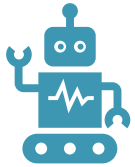
- Mimics Human Interaction in digital space
- User interface processes – Login/Logout to Systems, Export information, complete forms
- Mouse Clicks
- Move files and folders on desktops, complete forms
- Screen Scraping

APA + RPA

- Automate Entire End to End Business Process – Logging Into systems, moving files, conduct analysis/transformations and sending to a destination
- Designed to be used by the Business User and does not rely on development teams



PROCESS AUTOMATION TOGETHER ACCELERATING VALUE



RPA

Automating High Volume Tasks

- Bots Collect Data from Sources:
  - Screen Scraping
  - Green Screen
  - Unstructured Documents
- Front End System Login to automate data exports
- Validate and Cross-Reference Data
- Trigger Kickoff of Analytics Process

APA

Automating Analytic Processes and Outcomes

Data Quality & Preparation

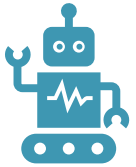
- All sources, 80+ input types, all data types
- Cleaning and Blending Data
- Data Quality Checks and Visual Profiling
- Perform Calculations and Transformations

Data Enrichment

- Geospatial Analytics
- NLP & OCR
- Descriptive Analytics
- Business insights

Data Science & Decisions

- Code-Free Data Science
- Regression Modelling
- Predictive Analytics
- Model Operations and Governance

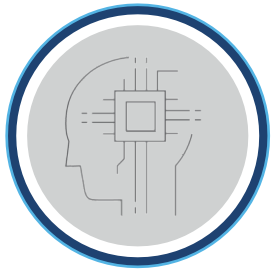


RPA

Automating Output Tasks

- Bots can pick up analytics data and write to websites, and input data mimicking human processes:
- Write Data to User Interfaces
- Write Data to forms and systems
- Used for "the last mile" of automation

FUTURE OF AI MARKET INSIGHTS



80% of the U.S. workforce could have at least 10% of their work tasks affected by the introduction of GPTs
-PEN & OpenAI

About **15% of all worker tasks in the US could be completed significantly faster**, at the same level of quality
- Wharton

By 2030, **70% of companies will have adopted at least one type of AI** technology
-McKinsey

Revenues from AI offerings are expected to generate $36 billion by 2028, opening up opportunities for financial leaders willing to incorporate emerging tools into their processes and operations.
- S&P Global Market

AI will have an estimated **$13-$15 Trillion impact on the global economy by 2030** (almost $5 trillion to US GDP)
-McKinsey

TYPES OF AI | OVERVIEW

AI systems can be placed into two groupings: General AI and Narrow AI. Together they evolve into Generative AI (GenAI).

NARROW AI + *GENERAL AI

Designed for specific tasks and operates within a limited domain.

Examples:

- **Voice Assistants (Siri, Alexa)**: These AI systems excel in voice recognition and provide assistance based on predefined commands.
- **Image Recognition Algorithms**: Algorithms that identify objects or patterns in images (e.g., facial recognition, object detection).
- **Recommendation Systems**: AI used by platforms like Netflix or Amazon to suggest personalized content.

Human-like cognitive abilities and can perform any intellectual task that a human can do

Examples:

- **Full Autonomy**: Imagine a single AI system that can drive car, compose music, diagnose diseases, and converse like a human.
- **AlphaZero by Google**: AlphaZero, developed by Google, can play complex board games (e.g., chess, Go) at a superhuman level.
- **IBM Watson**: Watson is an AI platform that can understand natural language, reason, and learn from data.

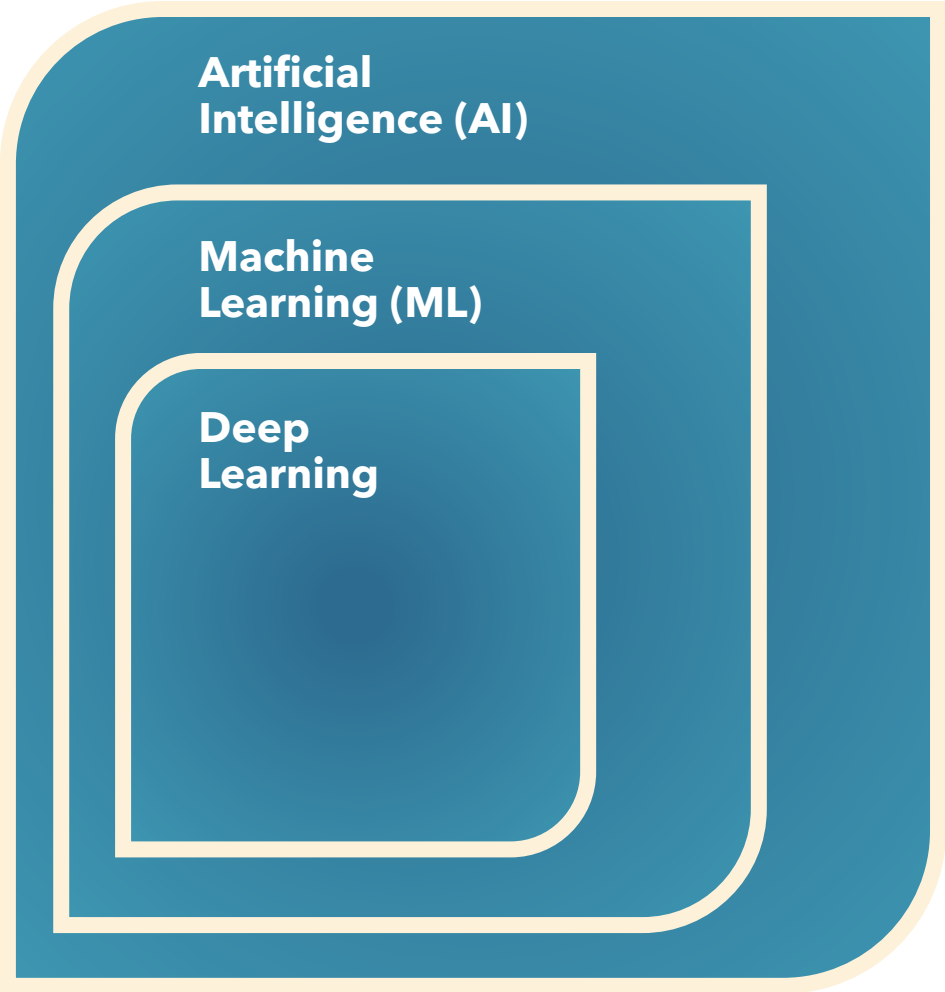
GENERATIVE AI (GenAI)

- ✓ **Creates new and unique data outputs using pattern recognition**
- ✓ **Mimics human creativity**
- ✓ **Acts as an additional layer of intelligence on top of the Traditional AI capabilities**

**Achieving General AI remains an open challenge. No system has reached this level yet. Requires a deep understanding of human cognition and consciousness.*

TYPES OF AI | OVERVIEW

Below is a very high-level overview of AI categories to level set on some of the technologies that this presentation will cover. AI technologies often build on each other & incorporate different techniques. These technologies often build upon each other, and GenAI (AI generated by neural networks) requires knowledge of both ML and DL techniques.



Artificial Intelligence (AI)

AI is the overarching field that enables computers and machines to simulate human intelligence and problem-solving capabilities.

Examples:

- Generative Pre-trained Transformers (GPT) responses
- Personalized Content Suggestions (e.g., Netflix, Amazon, etc.)
- Virtual Assistants (e.g., Siri, Google Assistant, and Alexa)

Machine Learning (ML)

AI technique that allows a computer to learn patterns from a training set of data to make predictions & identify patterns, without the need for rigid instructions or rules.

Examples:

- Email Filtering
- Fraud Detection
- Navigation & Route Planning

Deep Learning

DL is a subset of ML that uses neural networks with many layers (deep networks) for accurate pattern identification, similar to how the human brain functions. Deep learning can identify patterns more accurately than other ML techniques while requiring less processing power.

Examples:

- Customized search predictions based on previous history
- Image Classification (e.g., Facial Recognition)
- Natural Language Processing (NLP), reading natural language and understanding commands/requests

TRANSFORMATION MATURITY PATHS

These two paths represent distinct but interconnected journeys toward AI maturity, with one emphasizing the foundational role of a comprehensive data strategy and the other focusing on the evolution of automation capabilities. Organizations can choose or combine these paths based on their specific needs, industry dynamics, and strategic objectives.

DATA STRATEGY

1. Foundation Data Management
- Establish robust data infrastructure and basic governance.
- Cultivate awareness of data importance.

2. Data Integration and Advanced Analytics
- Integrate diverse data sources.
- Invest in analytics tools.

3. Predictive Modeling and Machine Learning
- Develop predictive modeling capabilities.
- Begin using machine learning for specific cases.

4. AI-Driven Decision-Making
- Integrate AI into decision-making.
- Establish AI governance frameworks.

5. Transformation and Innovation
- Innovate with AI-driven models.
- Foster a culture of continuous learning.

AUTOMATION STRATEGY

1. Basic Process Automation
- Implement basic RPA for routine tasks.
- Train employees on RPA benefits.

2. Cross-Functional Automation
- Expand RPA across departments.
- Establish an automation center of excellence.

3. Advanced RPA and Cognitive Automation
- Explore advanced RPA capabilities.
- Integrate RPA with AI technologies.

4. End-to-End Automation
- Extend automation to end-to-end processes.
- Implement intelligent automation solutions.

5. Transformation and Strategic Automation
- Align automation with strategic goals.
- Innovate with intelligent automation..

Finance & Accounting Application

FIT EVALUATION CRITERIA

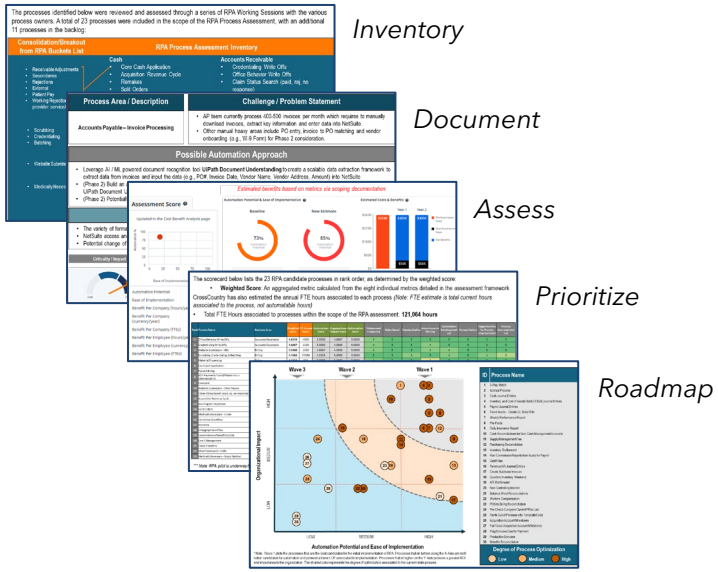
Optimal Process Characteristics

- Rules Based
- Manual / Repetitive
- Transactional
- High-Volume Data
- Frequent

Based on information gathered during process discovery, we apply the following framework to rank each process and, where applicable, capture specific metrics:

Criteria	Description
Volume and Frequency	▪ Monthly volume metrics and frequency with which cycles are executed
Rules-based	▪ Proportion of rules-based (e.g., do not require human judgement) process steps
Standardization	▪ Level of standardization within process tasks (e.g., whether tasks are identical each cycle)
Automation development level of effort	▪ Level of effort required to automate a portion, or all, of the process
Importance to the organization	▪ Criticality of final output to the organization ▪ FTE annual hours allotted to the process
Human Factors	▪ Process owner and corresponding team's level of interest and availability to complete improvement efforts
Opportunities for general process improvement	▪ Severity of pain points within the process which could be improved in ways other than automation (e.g., improved organization, controls, efficiency, etc.)
General process improvement level of effort	▪ Level of effort required to remediate existing pain points

Illustrative Examples:



Inventory

Document

Assess

Prioritize

Roadmap

CASE STUDY MONTH-END RECONCILIATION AUTOMATION

Input-Transform

alteryx

snowflake ORACLE NETSUITE

UiPath

PayPal stripe

Alteryx

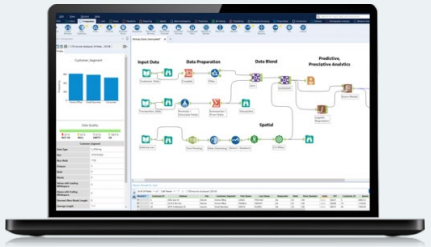
- Extracting month end data from Snowflake and NetSuite via API

UiPath

- Download transaction level data for each month end from PayPal and Stripe

Join-Transform-Output

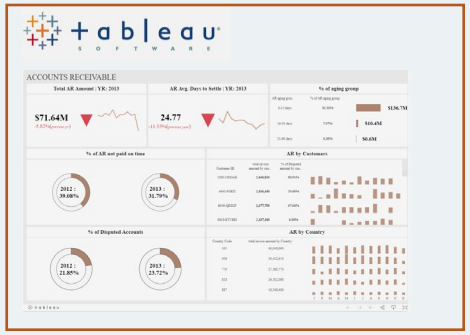
alteryx



- Combining and reconciling transaction data between PayPal, Stripe, and NetSuite.
- Flagging variances and mismatches for the user to investigate
- Creating journal entries to post for month end

Dashboard

tableau SOFTWARE



UiPath ORACLE NETSUITE

- Tableau dashboard to visualize reconciled output
- UiPath to post journal entries in NetSuite

GENAI WITHIN FINANCE & ACCOUNTING COMMON USE CASES

While some references to AI is primarily related to business rules, RPA, and process automation, there are general and Finance & Accounting use cases for GenAI that can be incorporated into business processes today.

General Use Cases

- Content generation
- Data analysis and visualization
- Translation & Summaries (not just among languages, but from complex to simple)
- Personalized recommendations
- Customer service
- Email drafting and summarization
- Coding assistance
- Document analysis
- Contract compliance

Potential Finance & Accounting Use Cases

- **Financial Reporting Commentary:** Beyond traditional financial metrics, CFOs are increasingly responsible for non-financial reporting (e.g., ESG – Environmental, Social, and Governance).
- **Budgeting and Forecasting:** GenAI can generate insights based on historical data, market trends, and business drivers.
- **Scenario Modeling:** GenAI can simulate different scenarios (e.g., market fluctuations, M&A) and provide commentary on potential outcomes.
- **Auditing:** Identifying abnormalities and potential issues
- **Tax Research & Compliance:** Tax tools can incorporate AI to return data from human-generated content (like SAP's Joule) and check compliance against tax codes

The **Thomson Reuters ChatGPT and Generative AI survey** conducted between May 3-15, 2023, found that 73% of 771 tax professionals acknowledge the tech can be used for tax, accounting, and audit work, yet only about half think that it should be. Only 11% currently use it on a wide scale, yet 51% expect to use it within the next six to 12 months

AI/ML PROCUREMENT CASE STUDIES

**Sample industry use case studies*

AI is transforming all aspects of business operations, including procurement. Many common procurement challenges are solved via AI/ML, providing desired outcomes and improving operational effectiveness.

Solution	Challenge	How AI/ML Solves It	Outcomes
Contract Compliance (Visibility and Risk Insights)	**Lack of** simple and complete **visibility** into all contractual agreements, obligations and clauses	AI can organize all MSA, SOW's, amendments, NDA's, etc. into a single data lake and extract over 150 clauses, data points and obligations, augmenting existing CLM systems	• Newfound visibility and ability to manage all contracts in a rapidly evolving regulatory landscape
Working Capital (Payment Terms Analysis)	Payments terms are **inconsistent** between documents and negotiated terms aren't being applied; supplier master data **isn't reconciled** to the prevailing agreement	Deep learning AI can ingest all documents and contextually extract data and dynamically match all terms against payments made to identify early payment transactions	• ~ 95% reduction in manual interventions • ~ 75% reduction in cost and time vs. traditional automation or manual efforts.
Purchase Price Verification (Contract to Actual)	Invoiced amounts at the line item/unit level **differ from the pricing agreed** in the contract; frequently an issue with high volume and complex services such as professional services	AI can perform line-item analysis of incoming invoices - AI can dynamically match all extracted line-item level prices against negotiated pricing including discounts to verify invoice prices.	• > 95% elimination of manual verifications in the A/P process • > 90% knowledge retention by the self learning AI models
Contract Summaries	Traditional Contract Management solutions are a simple digital file cabinet for completed contracts, and **users don't have time to read the document** to understand key aspects	AI can automatically extract contextual data from contracts and generate a summary of the contract into a pre-set template; which can be available to users. And users can link to the relevant clauses for details	• > 95% elimination of manual efforts to capture metadata • > Significantly improved access to contract content to manage execution

AI/ML FP&A CASE STUDIES

**Sample industry use case studies*

AI is transforming FP&A processes and reporting. Many FP&A problems can be solved through AI/ML, providing desired outcomes and improving cash and forecasting efficiencies.

Solution	Challenge	How AI/ML Solves It	Outcomes
Error and Fraud Detection	**Incorrect financial data or fraudulent transaction** are inputted into an ERP system, introducing financial risks and/or incorrect data reporting into monthly or quarterly board reporting	AI performs a scan on various data sources like payment history and IP addresses to see anomalies. AI can notify a company of fraudulent or incorrect transactions before they are approved	• 80% to 90% reduction in fraudulent or incorrect transactions
Forecasting and Predictive Analytics	Many **financial models are typically limited to internal data**, constraining the ability for a company to understand significant external factors (e.g., oil prices, geopolitical threats) on future financial performance	Use generative AI/ML modeling, companies can predict forecast trends based on various data inputs including historical trends and current market data to make better business decisions and investments	• Significant improvement in customer churn and sale forecasting • ~ 50% reduction in time vs. traditional analytics processes
Automated Cash Forecasting and Collection Management	**Inefficient payment collection strategy negatively impacts cash-flow inefficiency and forecasting**. Continued poor free case flow management can drive potential credit ratings downgrades	AI can improve the efficacy of the forecasting models and collection management by incorporating additional data sources (e.g., CRM, customer emails) to identify problematic customers proactively	• 15 Days to collect receivables with uncollectible balances at 0.70%.
Stress-testing Financial Models	Traditional financial modeling solutions are typically run on a quarterly basis, and **users don't apply a variety of different market scenarios** to understand financial risks (e.g., 2023 high inflation)	AI such as generative adversarial networks can simulate hypothetical, yet plausible, scenarios that are based on complex interdependencies learned from training data without the data limitations of normal financial models	• 20% to 30% improved coverage of various historical financial scenarios • Ability to capture various cross-asset dependence patterns on financial models

Risks & Limitations

AI RISKS LIMITATIONS

Most AI technologies learn to recognize patterns from training data, whether that is a limitless and growing library or a defined dataset. Because of this the AI will be limited by the limits of the training data. Below are limitations that arise based on the structure of the technology.

Limitation	Description
 **Truth is Perceived by Popularity, Not Objectivity**	• **AI will assume data that is consistently present in the model to be true** and has not other way of validating the information. If the training data set includes opinions or other inaccuracies, these flaws will be carried forward into the output. In some instances, AI may also jump to conclusions that are not present in the data.
 **Inability to Detect Bias and Ethical Considerations**	• **AI models, including GPT, can inherit biases from their training data, leading to biased outputs**. Addressing ethical concerns and minimizing bias is an ongoing challenge, especially with larger training data sets.
 **Lack of Real Understanding**	GPT models don't truly understand the content they generate. They rely on patterns learned from data, lacking true context or comprehension. This manifests in the following ways: • **Sensitivity to Input Phrasing:** The output of GPT models can be highly sensitive to minor changes in input phrasing. E.g., sophisticated input language may return results compiled from sources which use sophisticated language etc., impacting reliability and leading to variable responses. • **Limited Creativity and Originality:** While proficient at generating text based on learned patterns, GPT models may struggle to exhibit genuine creativity or produce original content. • **Inability to Reason:** GPT models lack the ability to reason logically. They may not effectively evaluate cause-and-effect relationships or draw conclusions based on complex information. • **Contextual Inconsistencies:** GPT models may struggle to maintain consistent context throughout longer narratives, resulting in contradictory or nonsensical information.

AI RISKS SPECIFIC RISKS & MITIGATION STRATEGIES

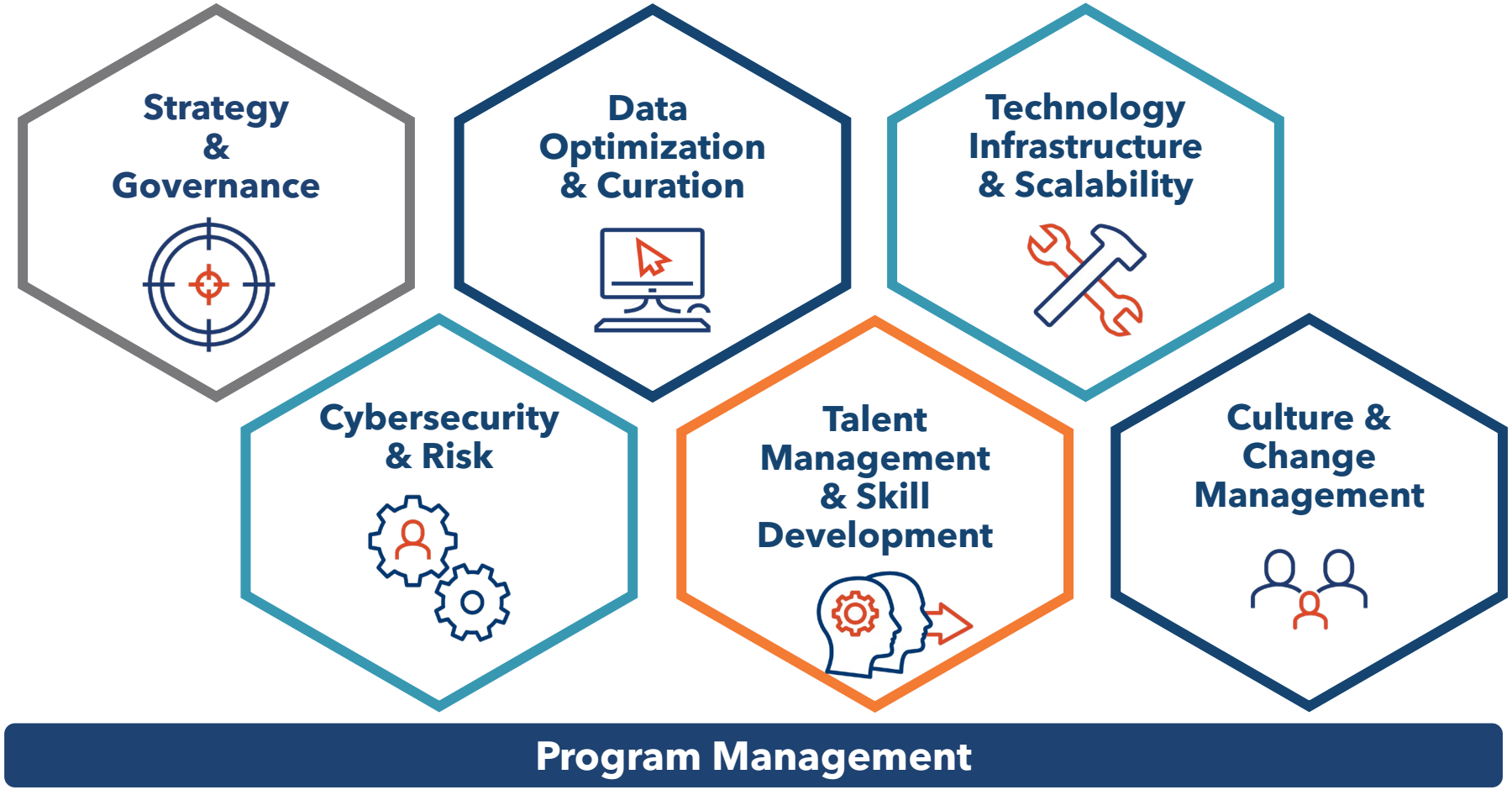
Any discussion of the benefits of AI would be incomplete without a fair assessment of accompanying risks. Below is a non-exhaustive list of potential risks and high-level mitigation strategies.

Risk	Risk Description	Risk Mitigations
Exposed Data	• In most free and standard subscription GPT platforms, all data entered is exposed to the model for training purposes. When working with proprietary data this is a significant concern. Some platforms offer paid packages that do not expose data and maintain privacy. Each situation needs to be evaluated based on security requirements & the risk & reward of using these technologies.	• Utilize protected enterprise versions and create controls & educate users to prevent data sharing on unauthorized platforms.
Cyber Security Concerns	• Unintended information disclosure or privacy breaches can occur due to AI-generated content or from cyber security breaches. Robust security measures are crucial.	• Incorporate security for AI platforms into broader enterprise cyber security programs.
Hallucinations & Inaccuracies	• Generated content may contain inaccuracies or misinformation, often due to incorrect connections made in the data and lack of output validation.	• Do not rely on AI output without independent validation in instances where precision & accuracy are important.
Ethical Concerns	• Biased or incomplete training data can perpetuate or amplify biases in outputs, with potential ethical and legal consequences.	• Limit potentially biased content in training data sets and do not rely on AI output without independent validation.
Regulatory Compliance Challenges	• Keeping pace with evolving regulations regarding data protection and ethical AI use can be challenging. Non-compliance may lead to legal repercussions.	• Incorporate AI compliance into broader enterprise compliance & risk management programs.
Lack of Accountability	• Determining responsibility for errors or ethical concerns arising from AI-generated content can be difficult. Clear accountability & transparency are vital. The autonomous nature of GPT models can lead to unforeseen outcomes.	• Launch AI with clear guidelines around use cases and with instructions around validation and accountability.

READINESS

ARTIFICIAL INTELLIGENCE READINESS

These elements are critical and essential for organizations aiming to mature in AI implementation. **By strategically addressing these areas, businesses can enhance their AI readiness and drive successful AI initiatives.**



AI/ML & TECH ENABLEMENT CHECKLIST

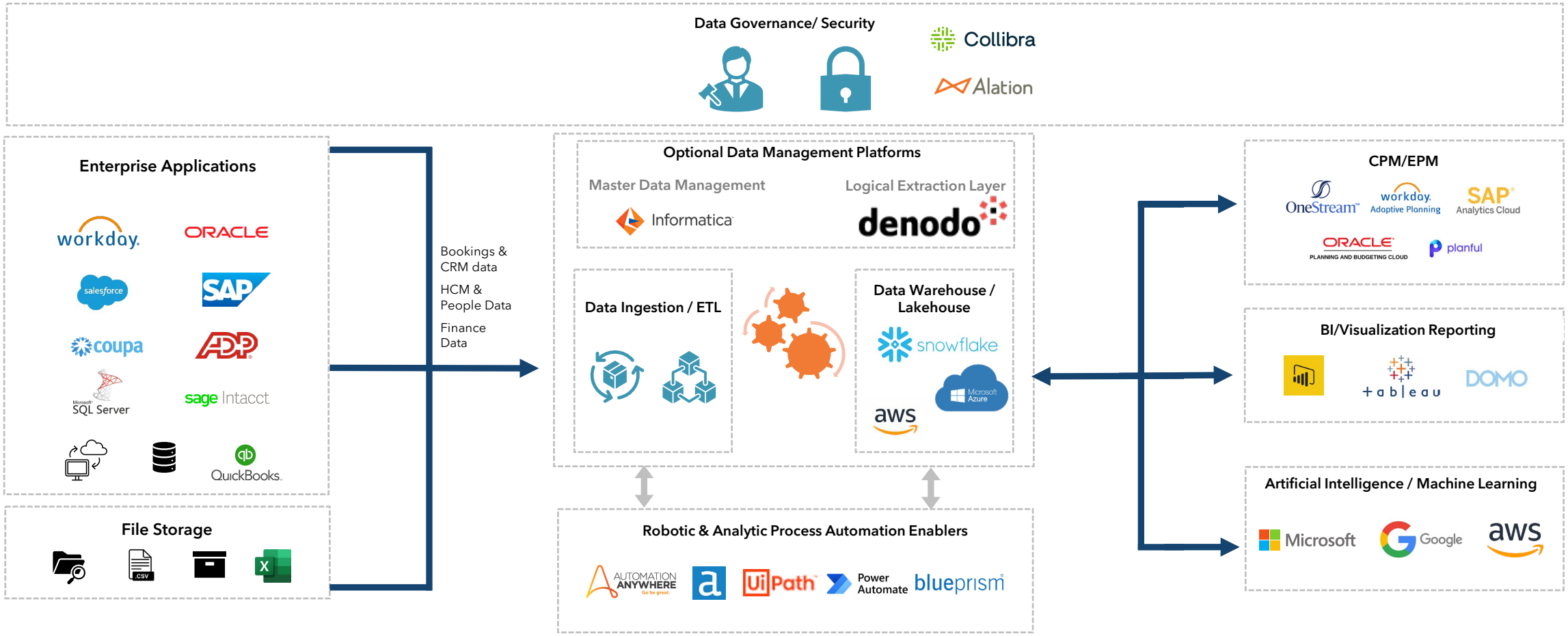
Priority Focus Area

When a company is ready to consider significant investment into moderate or even introductory AI capabilities, they need to assess their readiness and determine if they are positioned to successfully implement AI and obtain a positive ROI. Below is a checklist that can be used as a starting point.

Strategy & Governance	Digital Strategy		Defined AI strategy aligned with overall business objectives
			Identification of key use cases for AI implementation
	AI Governance		Executive commitment to AI integration
			Clear understanding of AI's potential impact on the business
	Budget & Resources		Allocated budget for AI initiatives
			Availability of skilled resources or plans for hiring/training
Data Optimization & Curation	Data Quality		Assess data quality and cleanliness
			Implement data cleansing and normalization processes
	Data Governance & Curation		Establish data governance policies
			Identify and assess Critical Data Elements (CDEs)
			Establish data catalog
			Map data lineage to identify data sources and consumers
Technology Infrastructure & Scalability	Technology Infrastructure		Assess current IT infrastructure for compatibility with AI
			Ensure scalability for increased computational demands
			Implement data warehouse for central data repository
	Integration with Existing Systems		Evaluate integration capabilities of AI solutions with existing business systems
			Evaluate integration abilities with planned future platforms
	Vendor Assessment		Assess vendor partnership needs for AI/ML adoption
			Recommend AI/ML solutions and vendor partnerships
Cybersecurity & Risk	Data Security		Implement robust data encryption and access controls
			Develop incident response plans for AI security breaches
	Model Security		Ensure the security of AI models & algorithms
			Implement measures to prevent adversarial attacks
	Risk Management		Create risk management plan to mitigate & manage risks
			Establish ethical Responsibility Framework
	Compliance		Understand and create compliance plans for relevant regulations (e.g., GDPR, HIPAA)
			Develop plan for adapting to evolving regulatory landscapes
Talent Mgt. & Skill Dev.	Talent Evaluation		Identify gaps between current skillsets within the organization and required skills for AI/ML implementation
			Develop plans for hiring AI/ML specialists to enhance skillsets
	Training Development		Advance training curriculum for existing employees
			Lead enterprise-wide data training initiatives
Culture & Change Management	Culture		Foster culture supporting AI/ML advancements and growth
			Adopt human-centric approach to individual & firmwide needs
	Change Management Strategy		Assess employee attitudes towards change and AI/ML adoption
			Develop strategy for managing organizational change associated with AI/ML adoption
	Change Management Implementation		Proactively mitigate challenges and harness new capabilities
			Effectively communicate progress throughout change management strategy implementation

CONCEPTUAL ARCHITECTURE

Conceptual architecture view (with representative technologies) of **centralizing and organizing incoming disparate data systems** with consistent standards, governance, and security.



Demonstration

Q&A