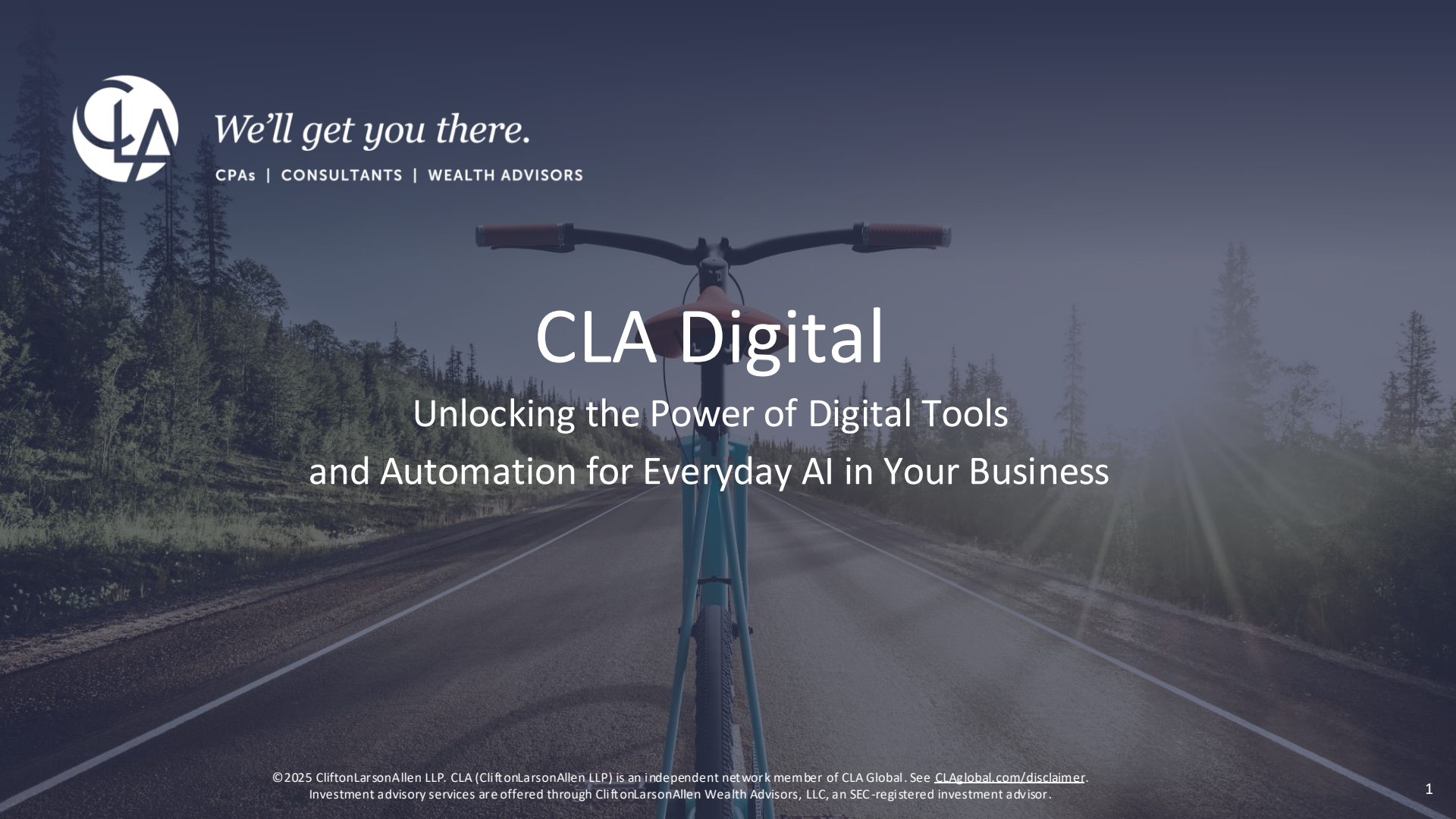

CLA Digital

Unlocking the Power of Digital Tools and Automation for Everyday AI in Your Business

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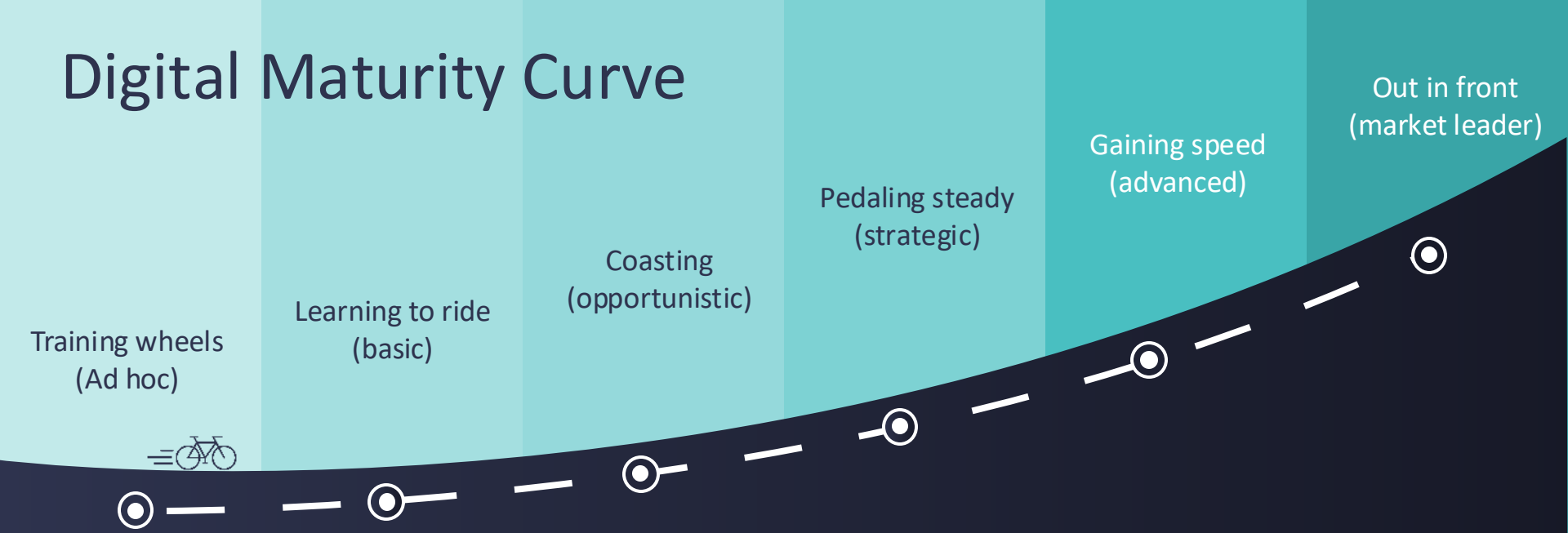
Digital Maturity Curve



We are all in this together

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Digital Topics We Will Cover Today…

Cyber security

Evaluating and implementing cyber security improvements for businesses.

Software integration

Inhouse products and resale solutions allow businesses to leverage off-the-shelf value.

AI and automation

Every business relies on data insights to make accurate informed decisions.

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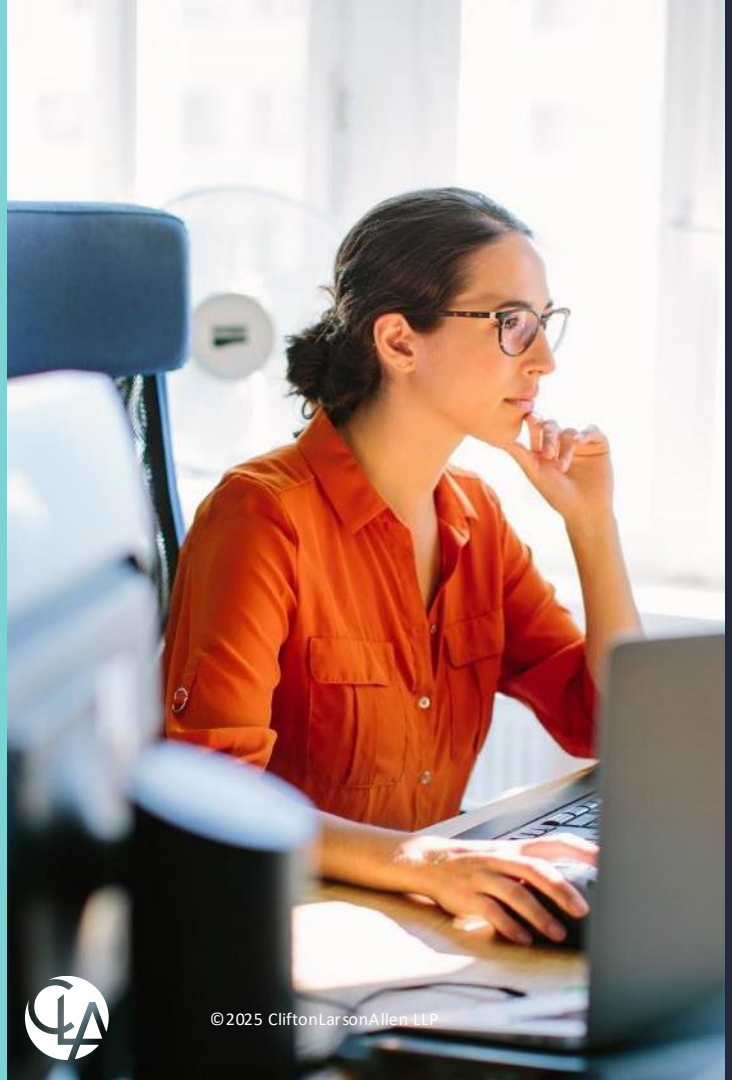

Some Cybersecurity Stats….

$4.88 million – Average cost of data breach in 2024 (IBM cost of a data breach report)

32% of breaches involved ransomware/extortion (Verizon DBIR)

68% increase of breaches involved a third-party (Verizon DBIR)

$5.37m ---> $4.38m – Drop in cost of a ransomware attack when law enforcement is involved (IBM cost of a data breach report)

- Do you know the contact information for your local law enforcement/FBI office?

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Who Are the Attackers?

- Cybercriminal, bad actors, threat actors, attackers – All the same!
- Nation States – aka APTs. Well funded and resourced, motivated by financial gain, geopolitical causes, economic disruption, espionage
- Organized Crime – Target businesses or individuals; motivated purely by financial gain
- Hacktivists – Ideology and social causes motivates this group. The hacktivist group Anonymous is the most famous example.
- Insider Threat Actors – Employees who misuse their access to compromise data security either out of curiosity, ignorance, revenge, or financial gain
- Hacker – Curiosity-seeking and skilled individual looking to increase their visibility and street cred on the dark web

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What Is the Impact of AI on Cybersecurity?

Threats

- Gen-AI
- Inadvertent data leaks by insiders
- Advanced malware development
- Attack automation – more efficient targeted attacks
- Deep fakes and voice cloning

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CLA Cybersecurity Services Overview

	Technical testing	Governance, risk, and compliance	Specialty assessments
Client pain points	• Concerned about the security of their network or infrastructure • Have experienced a recent breach or security event • Want to test the capability of their current IT provider	• Want to understand their level of cyber operational maturity • Have industry or regulatory compliance needs • Need support building out their cyber program	• Acquiring and integrating new organizations • Struggling to discuss/measure cyber risks with executive leadership and board members • Don't know where to start
CLA services	• Penetration testing • Vulnerability assessments • Application security review • Physical security assessments • Breach/incident response • Social engineering testing • Cloud security assessments	• Security maturity assessment • Control framework assessment • Governance documentation creation • Compliance attestation or validation	• M&A tech/security assessments • Incident response tabletops • Ransomware readiness testing • Security analytics and board reporting • Cyber readiness assessment

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Software Integration

Connect multiple key data sources for integrated reporting

Reduce the time taken to complete important business metrics

Generate accurate financial forecasting based on business metrics

Accurate and timely business insights

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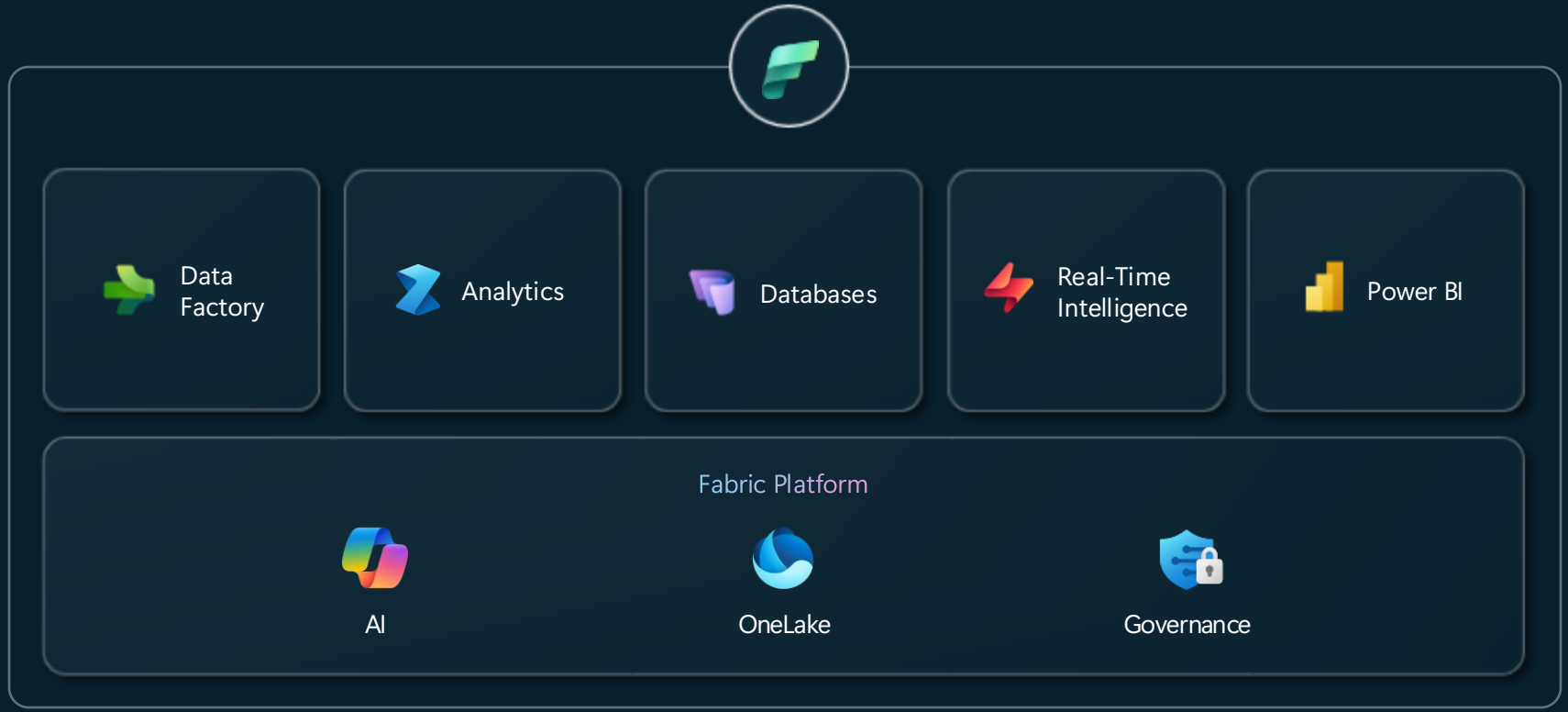
Microsoft Fabric

The unified data platform for AI transformation



Catania Oils Used Real-Time Data to Empower Decision-Making

The challenge

Catania had automated and modern systems — but they didn't speak to each other natively. To meet customers' growing needs, Catania needed to boost its technology and data integration.

How CLA helped

CLA's digital team helped lay the foundation for accurate data analysis and real-time decision-making with a streamlined approach and clear view of performance metrics.

Results achieved

Reduced manual processes and increased confidence in its data put Catania in control of its future while poised for scaled growth and continuous improvement.

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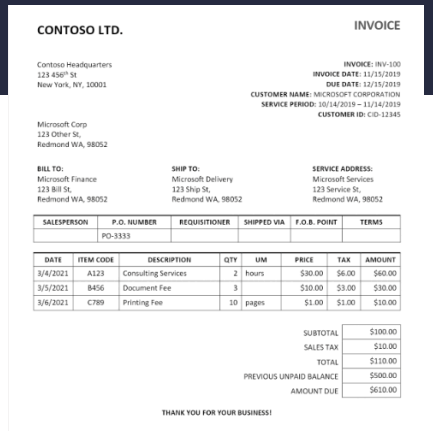
AI Adoption is Becoming a Part of Everyday Business

"For companies embracing the technology, 92% of employees say AI is having a positive impact on their work."

MIT Technology Review
Generative AI is empowering the digital workforce | MIT Technology Review
July 25, 2023



CONTOSO LTD.

INVOICE

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

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

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

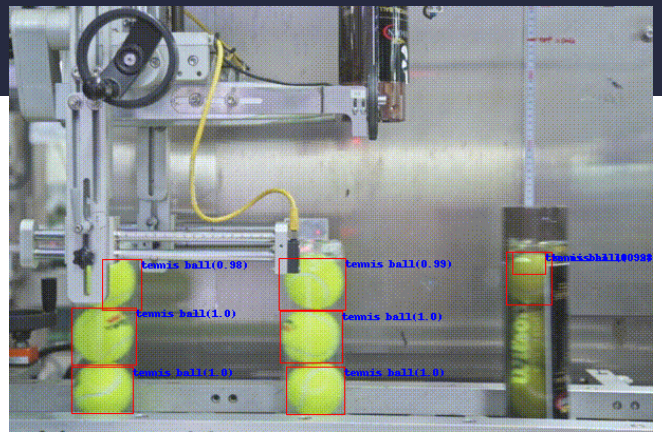
SERVICE ADDRESS:
Microsoft Services
123 Service St,
Redmond WA, 98052

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!



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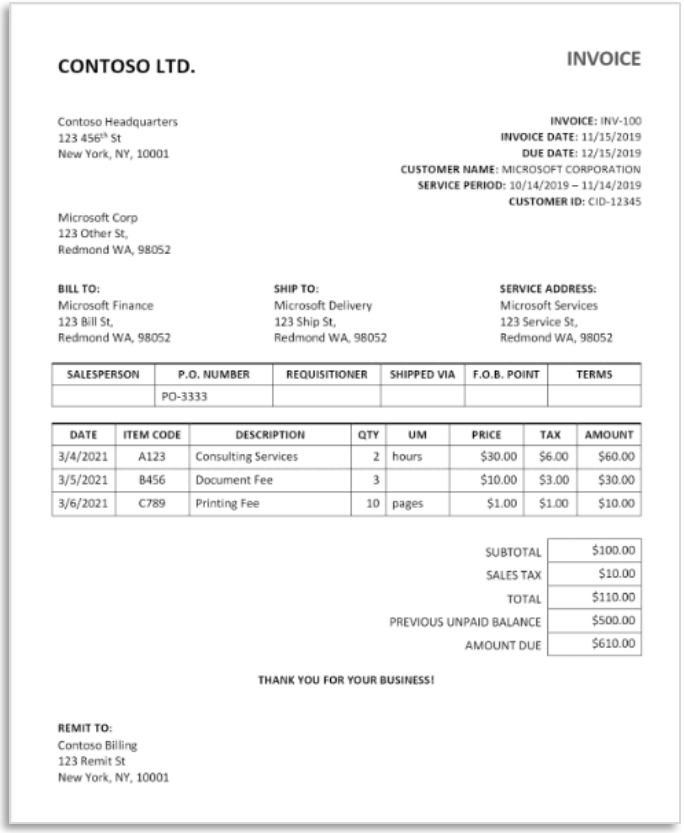
AP AI Automation



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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%

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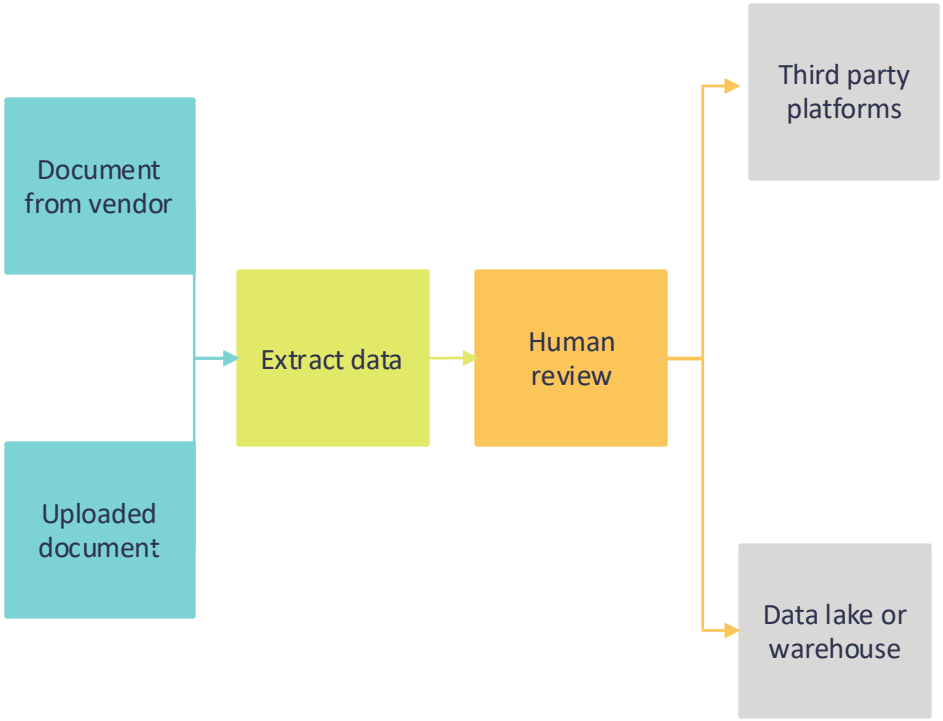
Document Automation



- Reduce manual data entry from documents such as invoices, BOL, Scale Tickets, Field Data, Shop floor documents etc.
- Minimize error associated with manual processing
- Integrate with existing workflow and enterprise systems

Reduction in manual invoice processing time

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Distributor Saves About $100,000, Reduces Errors With CLA Accounts Payable AI

The challenge

Black & Company's accounts payable process was outdated, relying on employees to manually match printed paper invoices to receipts.

How CLA helped

CLA digital team demonstrated CLA Accounts Payable AI. CLA ran three Black & Co. invoices through the tool, which read them with 98% accuracy.

Results achieved

CLA Accounts Payable AI has been handling more than 2,000 invoices monthly for Black & Co. Significant time has been saved and the number of errors has been reduced.

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Understanding Generative AI/Large Language Models

- Generative AI creates new content using existing data patterns.
- It leverages deep learning models for enhanced creativity.
- Users can prompt the exact output they would like to see.
- Businesses use generative AI for personalized marketing strategies, improve internal processes, and automating manual task.
- Ethical considerations are crucial in its deployment.

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Public(ChatGPT) vs. Private Large Language Models

- Public LLMs offer accessibility but may lack data privacy.
- Private LLMs confirm confidentiality but require investment.
- Public models can be vulnerable to security breaches.
- Private models provide tailored solutions for specific needs.
- Choosing the right model involves balancing cost and security.

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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

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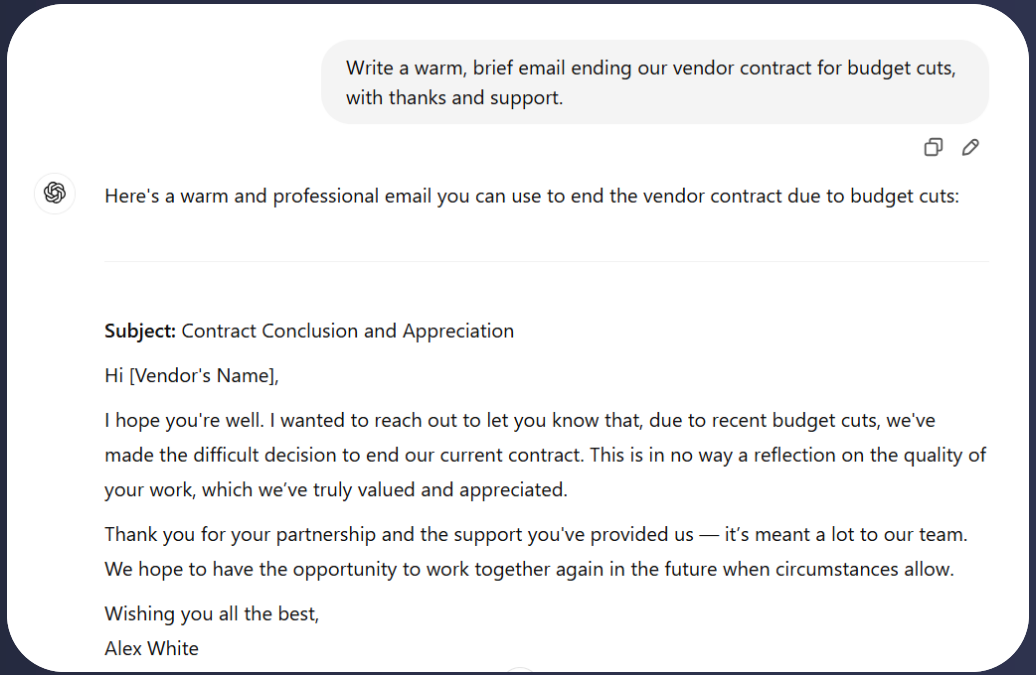
Assistant

- GenAI Copilot
- Long-tail tasks
  - Saves **4-20** hours/month
  - Daily users save **2x** the hours of occasional users
  - Users with brief training outperform those who don’t by **10-15%**
- Usage varies by functional area



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Agent

- Assistant + Reasoning + Tools
- Example:
  - UPS's ORION agent network: traffic, weather, package volume
  - Saves 100M miles and $300–400M annually
  - Picture the same agent re-routing seed deliveries when a levee breach closes Highway 61, or re-sequencing milk pickups to protect the cold-chain.
- *"Morning—overnight report shows pellet output down 6 % vs. plan and we blew past the diesel budget again.*
  - *Tell me why (equipment, shift, ingredient mix).*
  - *Flag the top three risks that could halt production this week.*
  - *Re-forecast the next 60 days using current corn and soy futures plus bin-level inventory.*
  - *Give me two slides with actions, owners, and due dates for today's 4 PM board update. Draft in my inbox by 11 AM. Thanks!"*

AI AGENT

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Top Use Cases for LLM in Manufacturing

- Enhancing production line efficiency through predictive maintenance and sensors
- Streamlining supply chain management with real-time analytics.
- Customer Service Automation
- GenAI Models for maintenance logs and identify root cause failures.
- Improving inventory management through demand forecasting.

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Let Us Help Build Your Digital Roadmap

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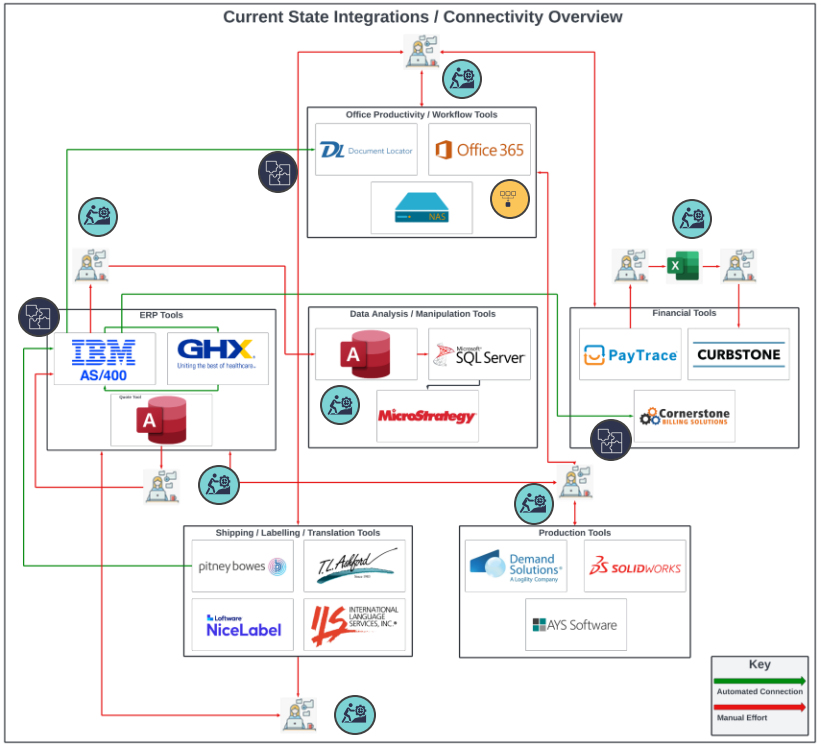
Digital Current State Overview

CLA has documented the current state systems diagram and outlined the associated key observations below:



Limited Systems Integrations

- Several core systems have existing integrations in place facilitating streamlined workflows
  - Still opportunity to enhance integrations to support optimal workflows
  - Optimizing ERP platform will reduce much complexity & cost

Manual Effort & Data Manipulation Required

- Numerous observed points of required manual data extraction / manipulation that can potentially be automated / streamlined
- Credit card solutions require manual exports from 1 system & upload to another

Office Productivity Platforms Represent Consolidation Opportunity

- Office 365 represents opportunity to consolidate document storage, workflow management, internal file sharing / collaboration & knowledge management repository & analytics solutions into single platform

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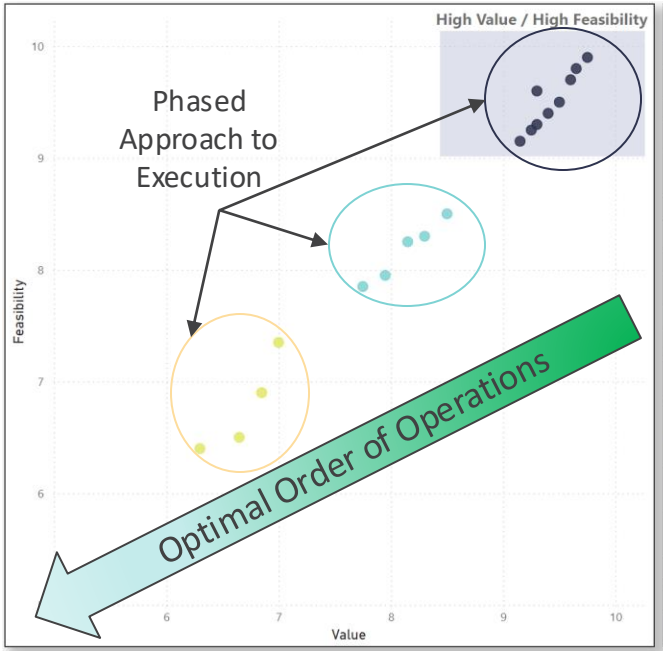
Use-Case Prioritization Matrix

Having identified and aligned the core digital opportunities for the client, CLA has developed the following matrix to prioritize use-cases that will enable the organization to execute a tactical roadmap to support its digital journey.



Use-Case Name	Value	Feasibility
KPI Identification	High	High
KPI Consolidation	High	High
KPI Segmentation	High	High
Data Calendar	High	High
Prioritize Dashboard Needs by Function & Deployment to the Organization	High	High
Migrate Access DB to Supported Version	High	High
Conduct ERP Evaluation & Selection Exercise	High	High
Implement Microsoft CoPilot	High	High
SQL Server Health & Performance Scan	High	High
Implement Modern ERP Platform	Medium	Medium
SharePoint Build Out	Medium	Medium
Consolidate Duplicative Use-Case Systems to Reduce Complexity	Medium	Medium
Develop Power Automate Flows to Support Workflow Automation Across the Organization	Medium	Medium
Document SOPs as They Relate to Core Systems Use	Medium	Medium
Design, Build & Deploy Production Data Warehouse Solution	Low	Low
Consolidated BI / Reporting Development	Low	Low
Self-Service Analytics	Low	Low
Ad-Hoc Reporting	Low	Low

Phase 1
Data Strategy, Quick Wins

Phase 2
Systems Optimization

Phase 3
Enterprise Analytics

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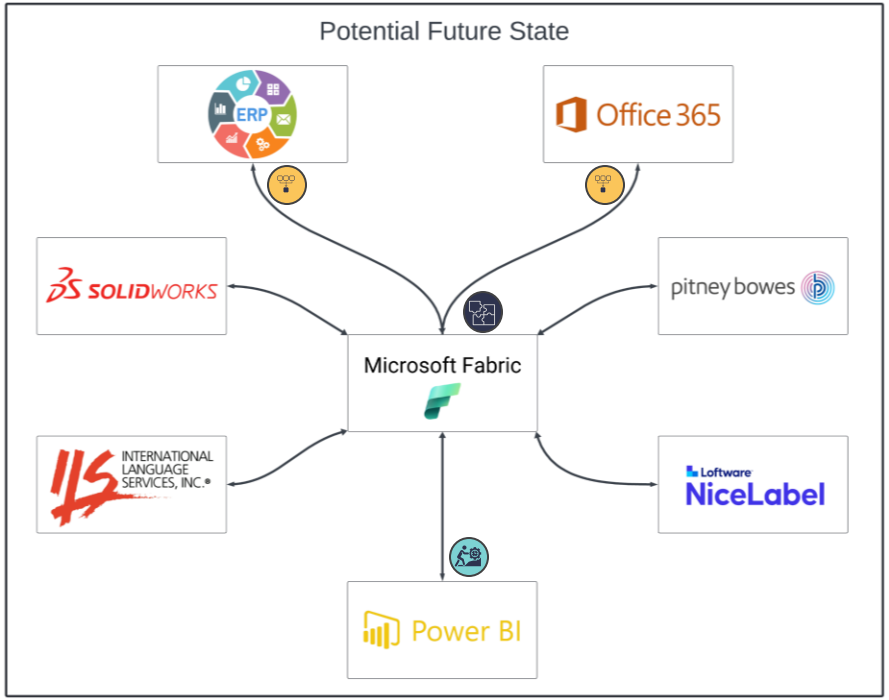
Potential Future State Diagram

Once the identified tactical use cases have been implemented, the organization will be able to realize the future state systems & architecture diagram detailed below:



Scalable Systems Integration & Connectivity

- Centralized data repository provides opportunity for far wider systems integration, multi-directional data transfer, conditional workflow driven logic and broader automation support to facilitate efficiency

Automated Insights & Operational Reporting

- Scheduled refresh capabilities will provide access to more timely insights while minimizing effort required to derive insights
- Custom tailored reports / visuals will support specific teams, departments and organizational functions with KPIs needed to drive performance

Numerous Redundant Systems Eliminated

- Fewer core platforms required to operate effectively day-to-day
- Potential elimination of: DMAS, PayTrace, Curbstone, CornerStone, TL Ashford, Demand Solutions, AYS Software, Access

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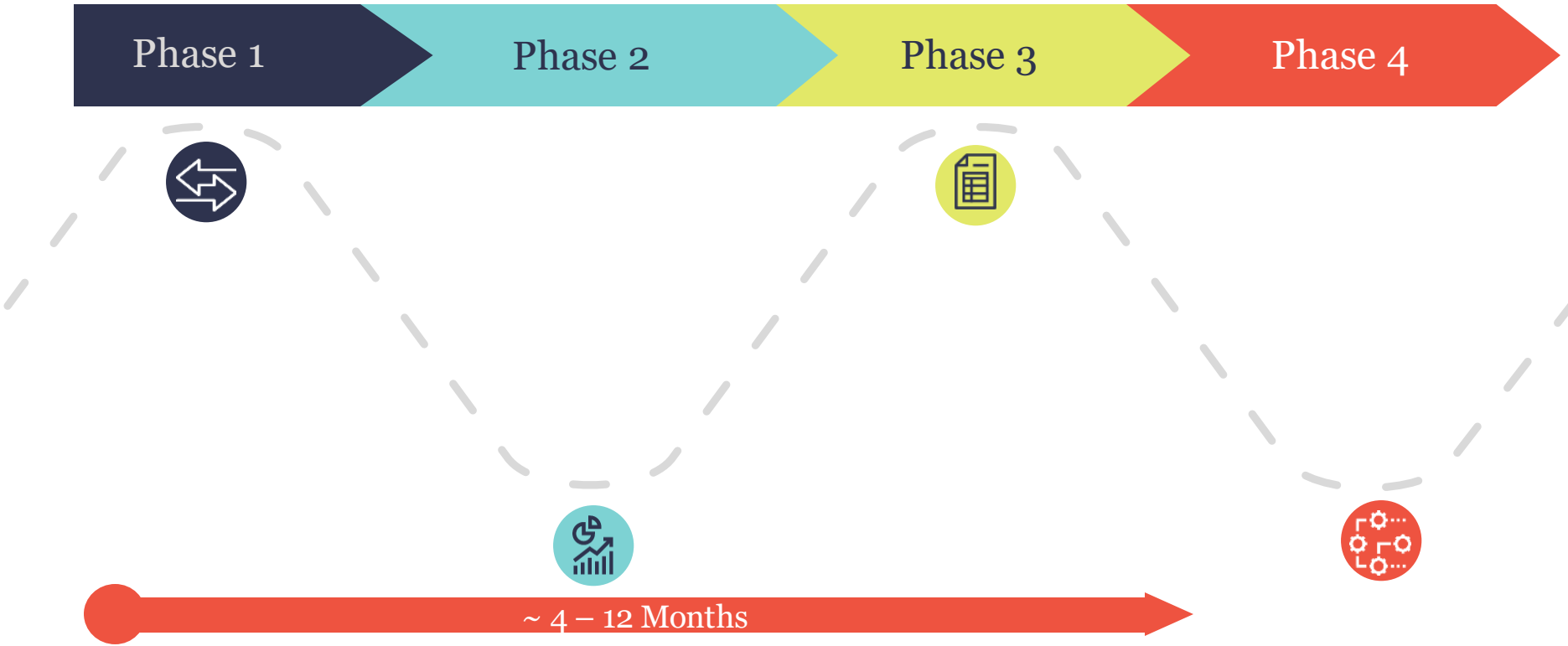
Roadmap and Go-Forward Plan



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Thank you!

Craig Ritsema
Digital Growth Director
craig.ritsema@CLAconnect.com
248-421-2724

Please feel free to stop by our booth #123 to talk further!

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