

EDM Webinar

Explore the Future of Process Automation & Artificial Intelligence

AI-driven data & processes automation

A conversation with...



Andrew Hayden
Principal Product Marketing Manager
Precisely



Moderator



Mike Meriton
Co-Founder
EDM Council



Andrew Hayden
Principal Product
Marketing Manager
Precisely



Poll Question

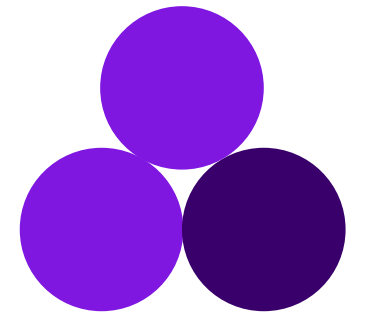
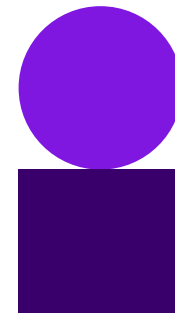
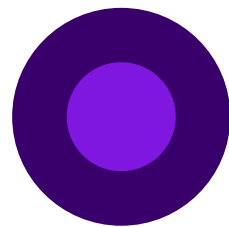
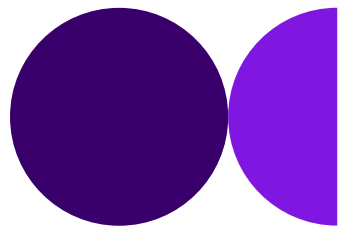
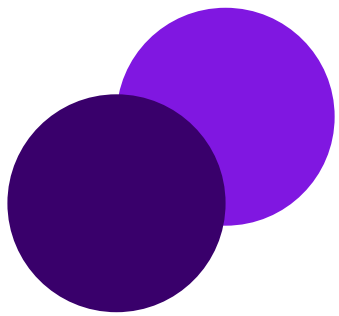
Where is your organization on your AI Journey?

- We've heard of it, but not sure where to start
- We are interested, but we need to clean up our systems and data before moving to the next step.
- We have a few small initiatives using available AI resources (ChatGPT, Gemini, etc.), but nothing directly uses our in-house data.
- We have established an internal team to evaluate the opportunities and risks associated with AI
- We are leading the wave and using it widely in our organization

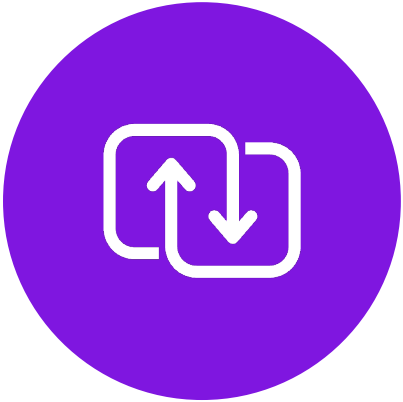
Agenda

- Automation, data, and digital transformation
- Challenges with master data
- Web-based Interfaces: Challenges and options
- Artificial intelligence in automation
- Key takeaways
- Questions
- About Precisely
- About EDM

Automation, data, and digital transformation



Industry needs:



Be more agile



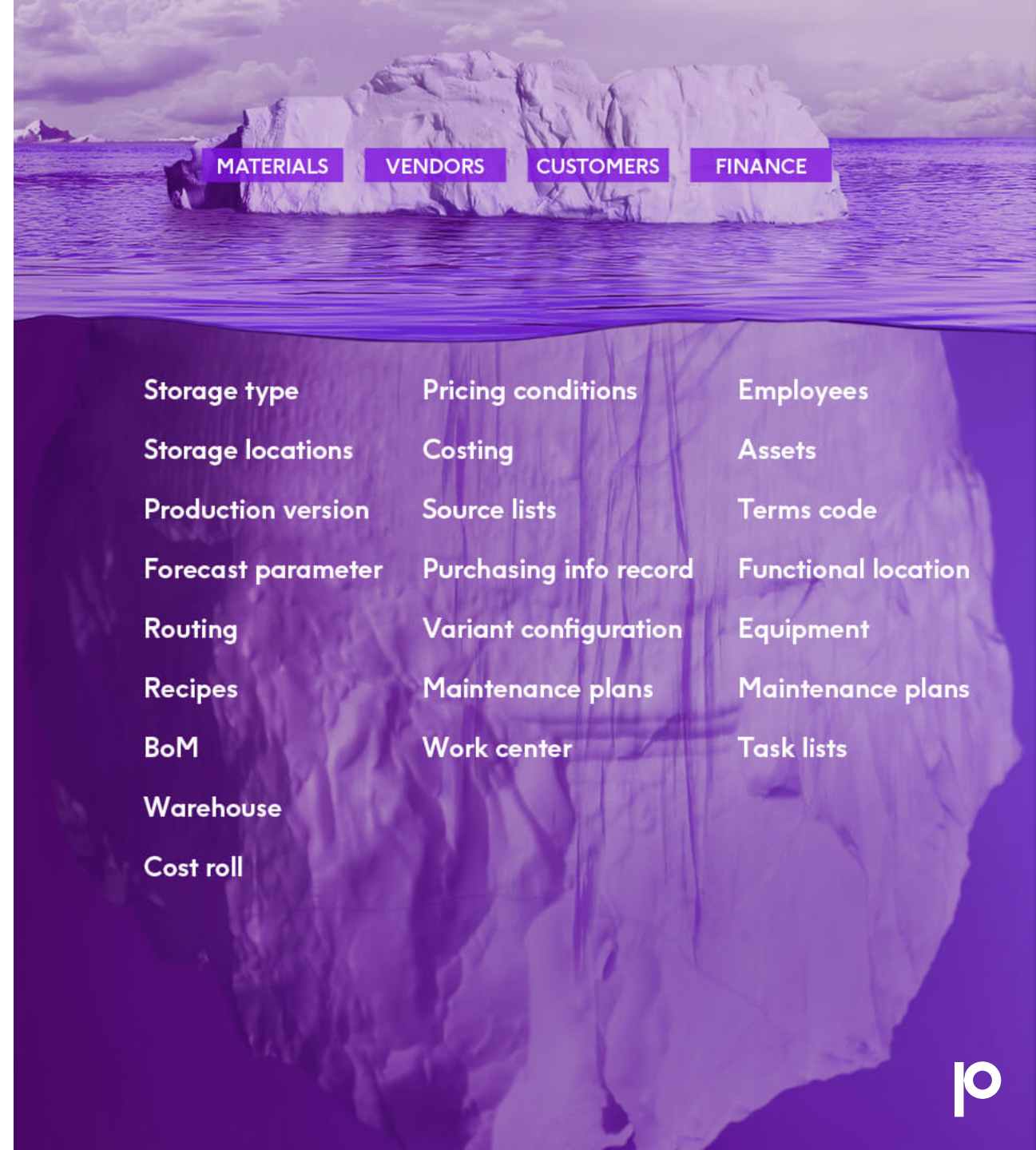
Go faster



Improve the quality and integrity of your most important data



The complexity of master data



MATERIALS

VENDORS

CUSTOMERS

FINANCE

Storage type

Pricing conditions

Employees

Storage locations

Costing

Assets

Production version

Source lists

Terms code

Forecast parameter

Purchasing info record

Functional location

Routing

Variant configuration

Equipment

Recipes

Maintenance plans

Maintenance plans

BoM

Work center

Task lists

Warehouse

Cost roll

Complexity is multidimensional

Data complexity

- Complexity of master data records
- High-volume data processes
- Challenges data complexity creates for manual data entry and management processes

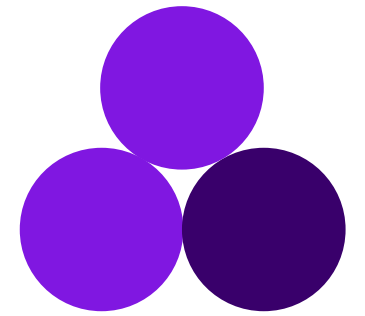
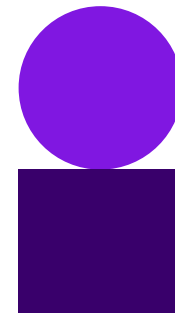
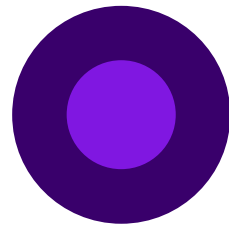
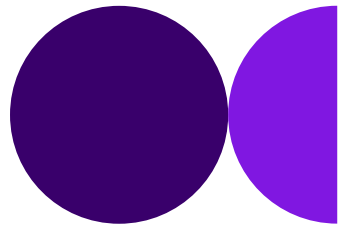
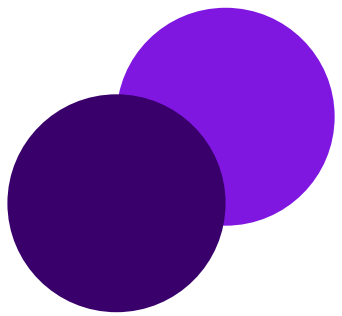
Process complexity

- Complex, data-intensive business processes involving multiple constituents are a challenge to automate
- Process governance and tracking
- Human-in-the-loop processes pose unique challenges for automation

Organizational complexity

- Multi-departmental processes
- Competing business priorities
- Short-term gains vs strategic initiatives

Customer Master Data



Customer Master: Lifeblood of Customer Relationships

Connects multiple business
use cases and activities



Customer Master = Infinite Data Options

General Data

- Think of it as the customer's identity card within the system. Examples of general data include:
 - Customer name and contact details (address, phone, email)
 - Language preference
 - Tax identification number

Company Code Data

- Company code data allows for tailored financial management for each unit interacting with the customer. Examples of company code data include:
 - Payment terms and methods
 - Reconciliation account numbers
 - Dunning procedures (late payment collection process)

Sales Area Data

- This section allows for optimized sales and order processing based on the chosen channel. Examples of sales area data include:
 - Order processing details (pricing, discounts)
 - Shipping information (delivery points, incoterms)
 - Billing specifics (responsible sales office)

Additional Data (Optional)

- This category provides flexibility to capture information crucial to their business processes. Examples of additional data include:
 - Customer industry classification
 - Preferred communication channels (email, phone)
 - Purchase history and buying behavior

Customer Data Record Challenges

Data Complexity &
Redundancy

Data Creation &
Management
Processes

Data Quality &
Consistency

Data Integration
Challenges

Operational Red Flags

Inconsistent or
inaccurate customer
data can lead to:

Order Fulfillment Errors

Wrong products shipped, incorrect
billing, and customer dissatisfaction

Shipping Delays

Missing address data or inaccurate prices
being charged, cost time and money

Inventory Mismanagement

Incorrect orders, ship dates, and missed
shipments lead to wasted resources and
lost sales opportunities

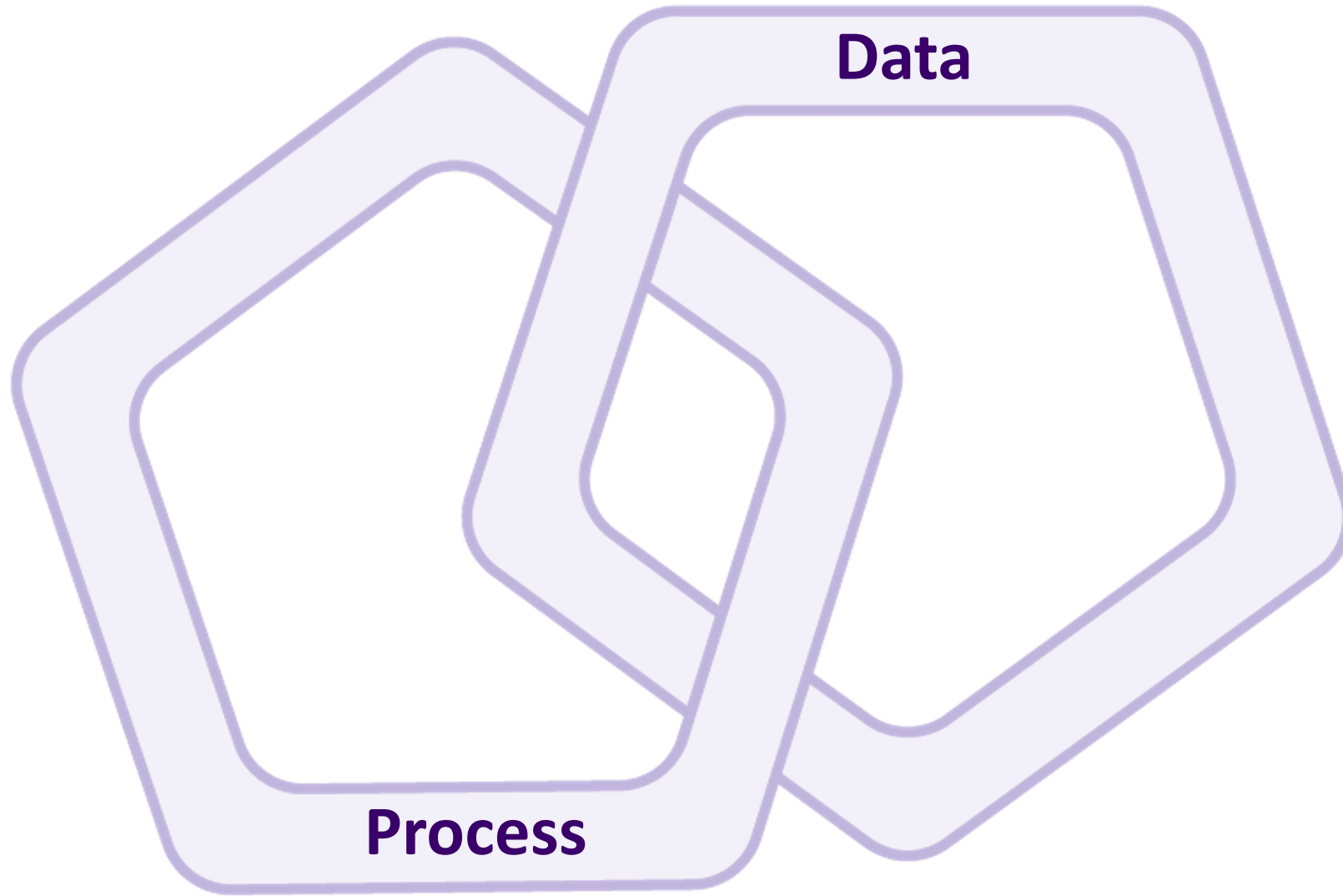
Financial Reporting Inaccuracies

Misleading profitability calculations and
income issues

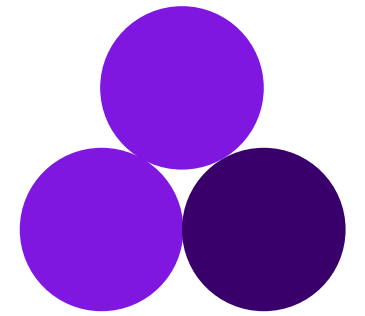
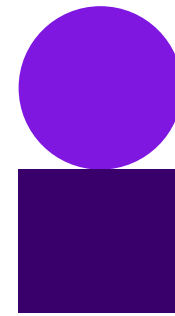
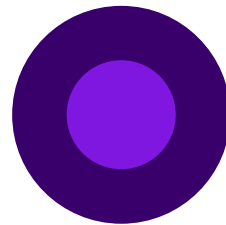
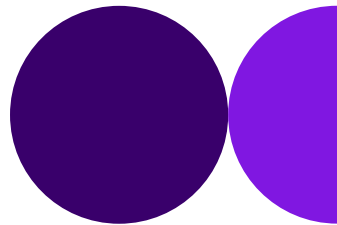
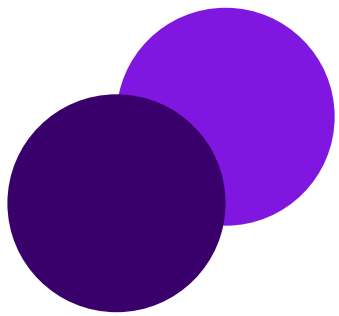
Technology is a means to an end: Data is the currency of digital transformation

HfS Research Blog

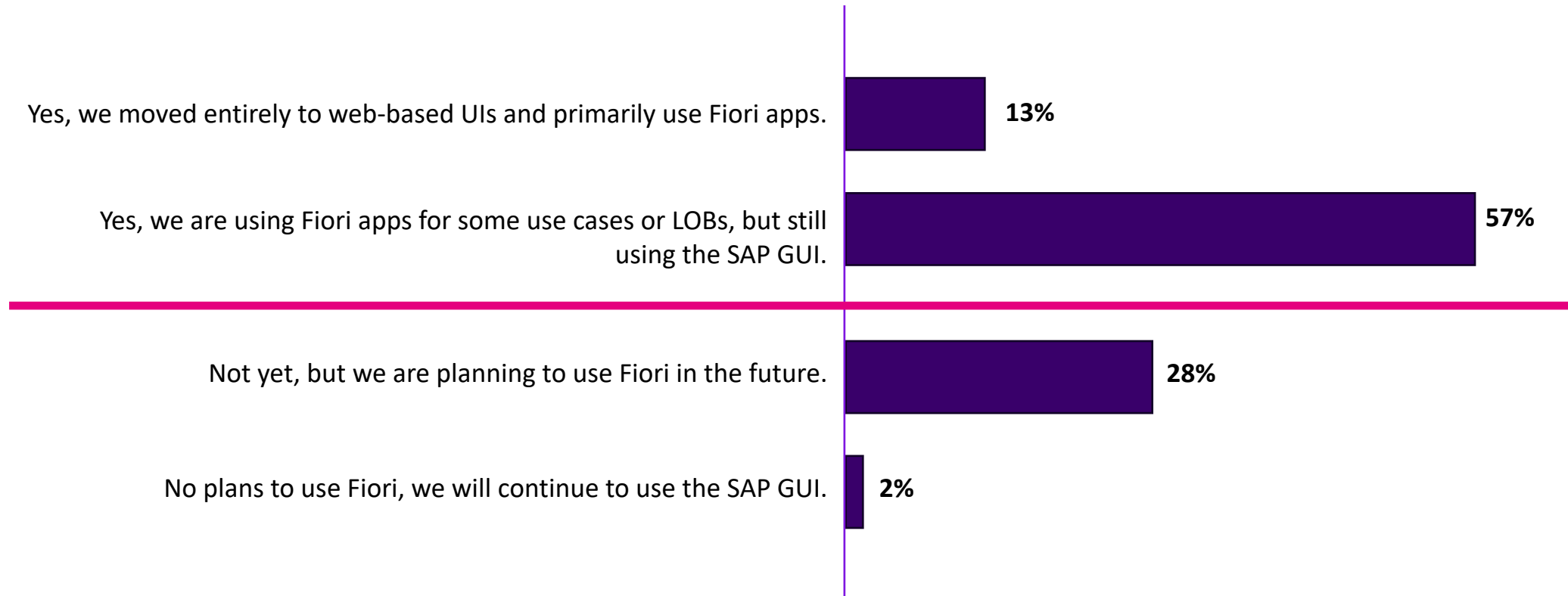
Interdependence of process and data



Web-based Interfaces: Challenges and options



ASUG survey results for Fiori use



Industry challenges with “Modern” user interfaces

- **Unchanged from old to new**
 - Manual data entry
 - Slow
 - Complex processes
 - Error-prone
- **Certain complex processes are only available as online apps**
 - Example: Commodity Codes in SAP S/4HANA
- **Launchpad sites can mask the true nature of app**
 - Intermix legacy and modern apps

The screenshot displays the SAP S/4HANA 'Post General Journal Entries' interface. The top navigation bar includes the SAP logo and the title 'Post General Journal Entries'. Below this, there are tabs for 'HEADER', 'ATTACHMENTS', 'NOTES', and 'BALANCES'. The main form area contains several input fields for header data:

- *Journal Entry Date: 07/09/2022
- *Posting Date: 07/09/2022
- Period: 00
- *Journal Entry Type: SA
- *Company Code: 1710
- *Transaction Currency: USD
- Ledger Group: (empty)
- Reference: (empty)
- Intercompany Transac: (empty)
- Partner Bus. Area: (empty)
- Header Text: (empty)
- Exchange Rate: (empty)
- Translation Date: (empty)

Below the header fields, there is a section for 'Line Items (2)'. This section contains a table with two rows of journal entry data:

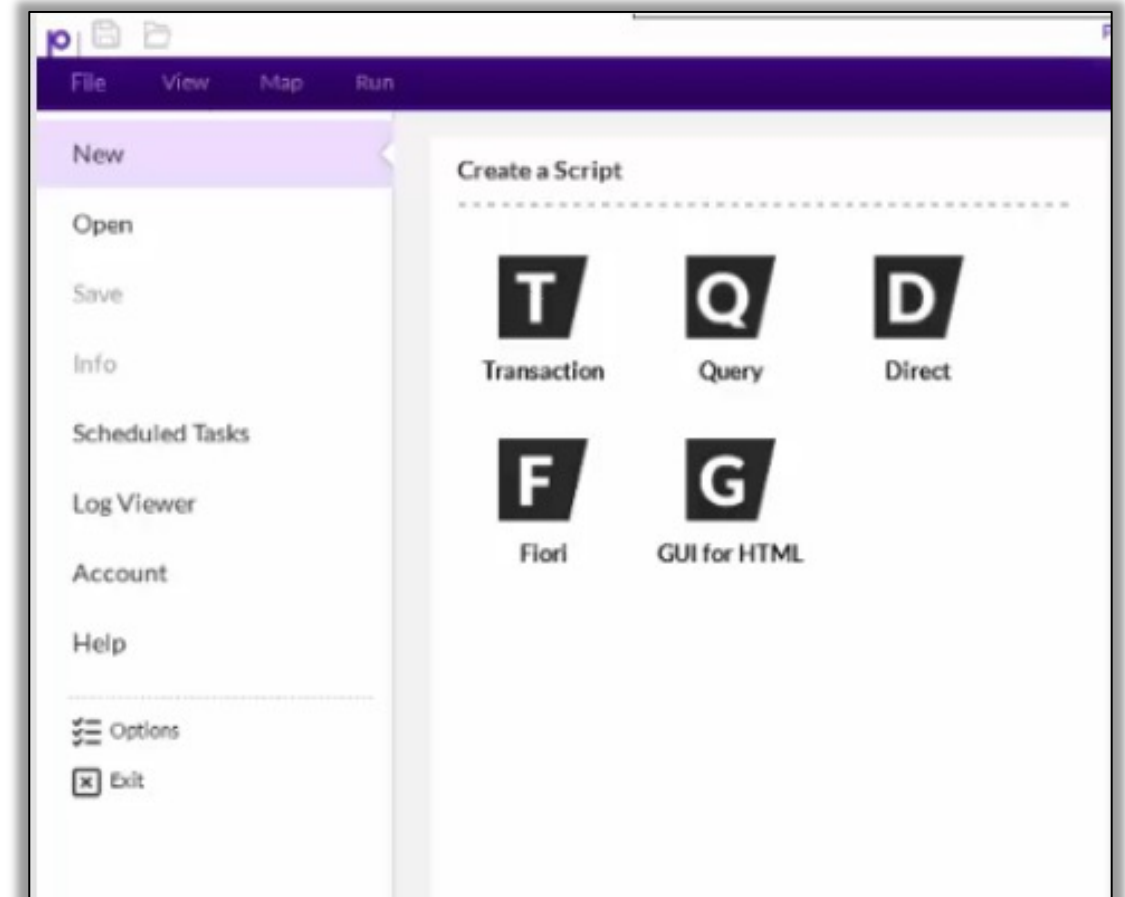
	Company Code	*G/L Account	*Debit		*Credit
> 1	1710	66000000	100.00	USD	0.00
> 2	1710	65000000	0.00	USD	100.00

The bottom right corner of the table area shows 'Total Debit:'.

Unified Automation Tools

Use multi-interface app automation for

- **Repetitive tasks**
- **Higher volume**
- **Complexity** – Eliminate multiple steps
 - Find object, open, edit, click tab, scroll down, drill down, etc.
- **Simplified development environments**
- **Meet the needs of business teams**
 - Efficiency, accuracy, consistency, and performance
 - No surface automation – determines API call(s) for you
 - Provide true citizen development of automation solutions

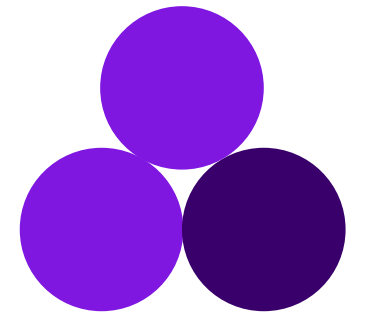
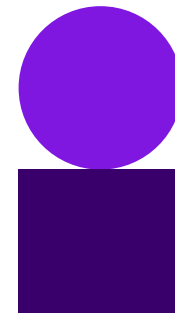
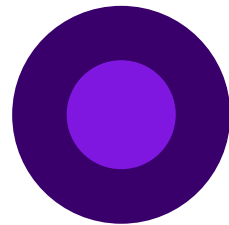
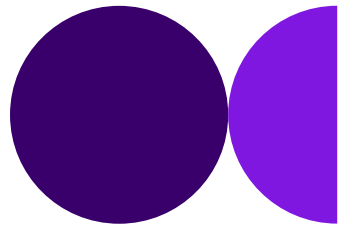
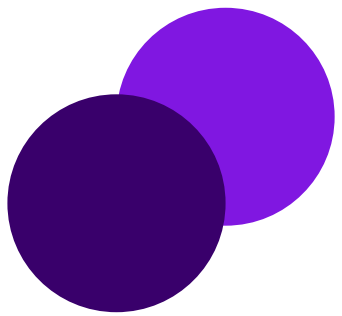


Poll Question

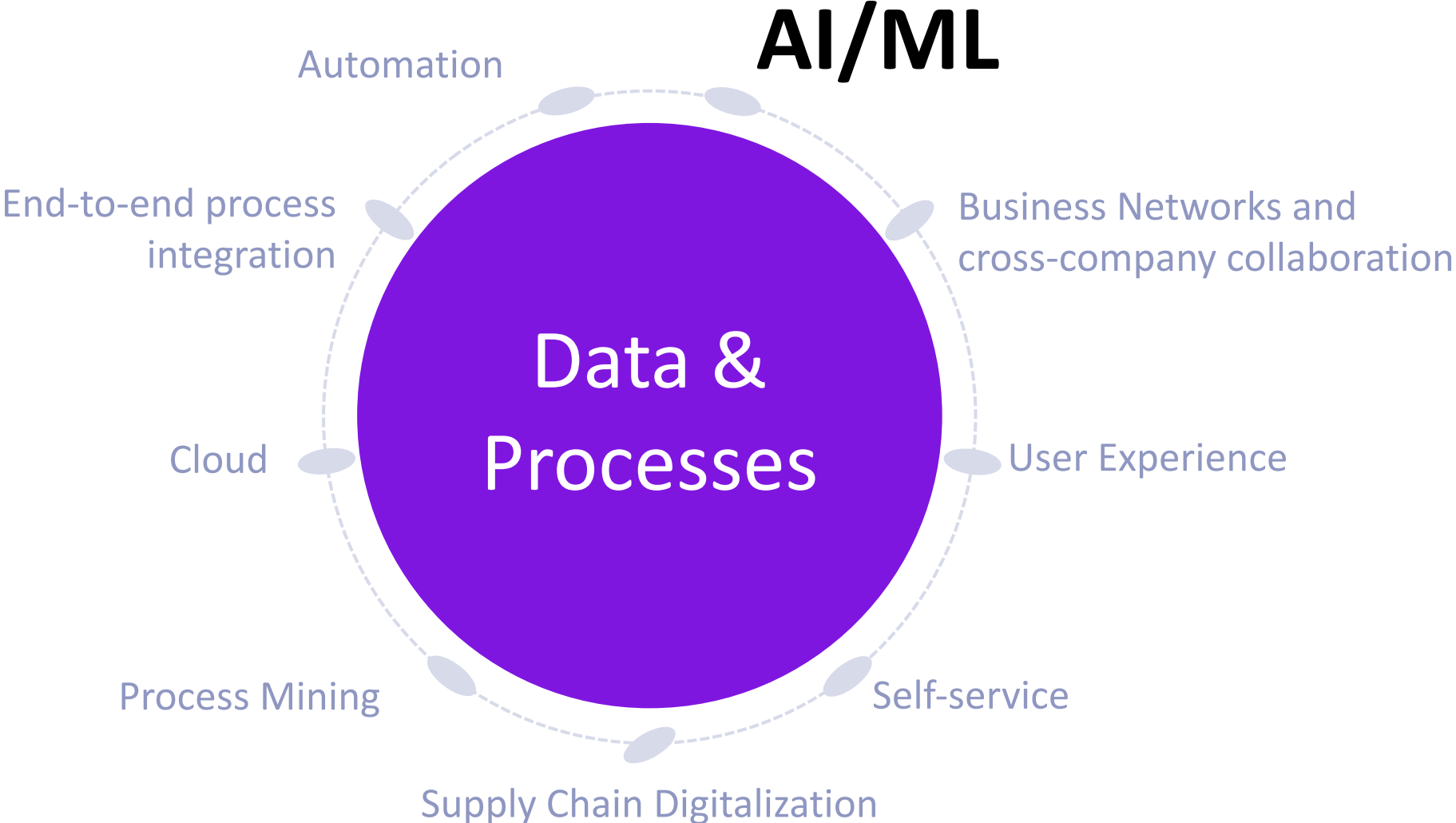
What do you believe is the biggest impact AI will have on your organization?

- Help make our employees more efficient
- Provide better, faster reporting and analysis
- Eliminate manual and tedious tasks
- Replace several employees across various parts of the company - accounting, analytics, marketing, etc.
- Help us better understand customer behavior

Artificial Intelligence



Digital Transformation Journey



AI comes in various flavors

	Generative AI	Predictive AI
Goal	Create new content	Make accurate predictions
Algorithms	Complex algorithms and deep learning based on LLMs	Statistical algorithms based on machine learning and observations
Output	New content such as text, images, music, etc.	Predictions such as the likelihood of a field value or routing destination

Material Master Creation

To improve data quality, companies typically set out to define 100s of data validation rules

NORTHWEST HOLDINGS

MATERIAL CHANGE REQUEST INFORMATION

Request ID: MC00078 | Requester: Sigrid Kok | Date Requested: 09/28/2023

MATERIAL SEARCH

MATERIAL INFORMATION

BASIC DATA

Material Number *	Material Description *	Base Unit of Measure *	Material Group
MS1005	Inspection Machine Medium	-- Select -- <small>Required</small>	0001
Old Material Number	Product Hierarchy	Gross Weight	Net Weight
MS1005OLD	00149001100004	70	65
Weight Unit	Volume	Volume Unit	Size Dimensions
L	S	FTS	SX214

Basic Data Long Text


[Validate Basic Data](#)

SAP Message


Err: Fill in all required entry fields

Embed your business rules to improve data quality

Challenges in establishing business rules



Heavy reliance on
SMEs and tacit
knowledge



Gaining cross-
functional
alignment is time
consuming

What if you could eliminate the need for many of these rules by using **Artificial Intelligence**?

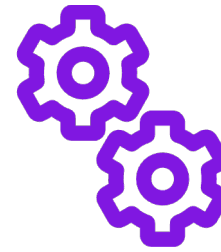
Master Data Creation with AI



New material
creation request



User enters
minimum
number of input
fields



AI predicts output
fields based on
delivered input
fields



AI output fields are
used to pre-
populate and
validate form fields

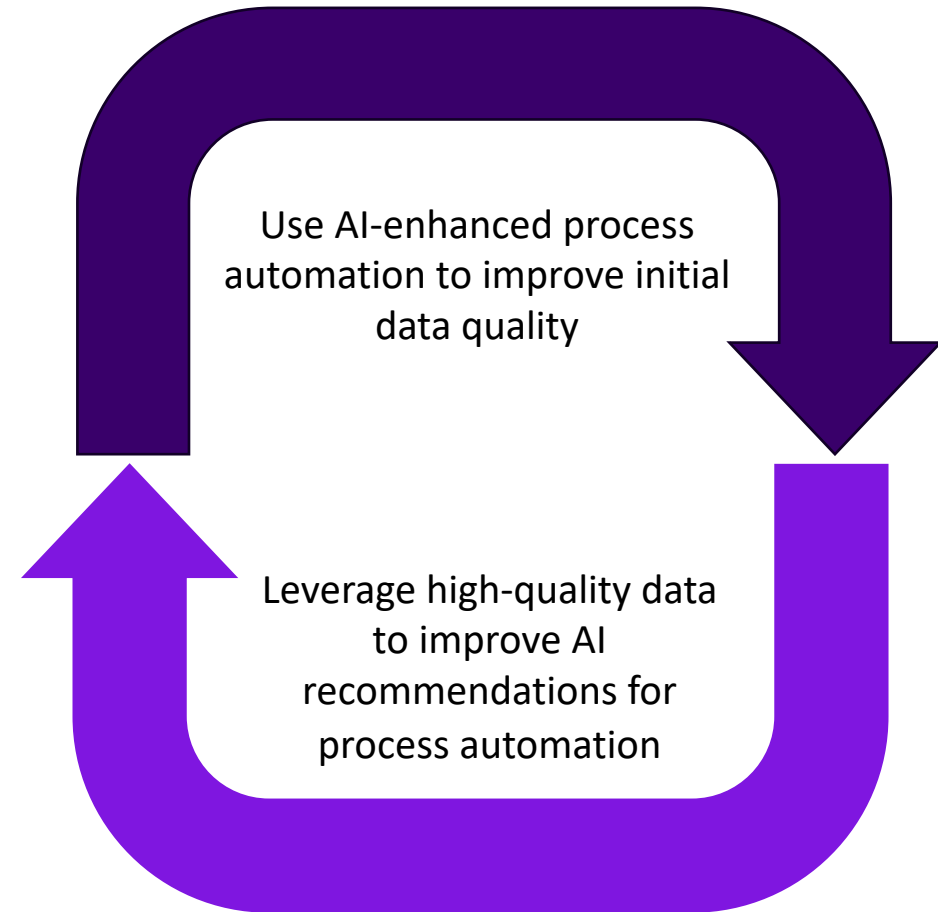
AI Recommendation Output

The screenshot displays the 'precisely Evolve' interface for material M16. The top navigation bar includes the 'precisely Evolve' logo, a user profile 'E Evolve AI demo', and another user profile 'T Testadmin3'. A left sidebar contains navigation icons. The main content area is a grid of 16 material attributes, each with a predicted value and a 100.00% confidence level. The predicted values are: M16, AIMPMP300, x, Z002, 0003, 144, FERT, 2, 0, 50000006, NULL, M0001M003, A07, X0, 0, 40, NULL, 1, EX, 2000, 1116, 56, and 1. The 'x' and '1116' values are highlighted in blue, while all others are in green. A mouse cursor is visible over the 'NULL' value for 'Material pricing grp'.

Attribute	Predicted Value	Confidence
Material Group	M16	100.00%
Material Group	AIMPMP300	100.00%
Procurement type	x	71.43% (X), 28.57% (F)
MRP group	Z002	100.00%
Prod Sched Profile	0003	100.00%
Material group 2	144	100.00%
Purchasing value key	2	100.00%
Minimum Lot Size	0	100.00%
ConfigurableMaterial	50000006	100.00%
Volume rebate group	NULL	100.00%
Product Hierarchy	M0001M003	100.00%
MRP Type	X0	100.00%
Maximum Lot Size	0	100.00%
Planning strategy group	40	100.00%
Material pricing grp	NULL	100.00%
Variable Purchase Order Unit	1	100.00%
Lot size	EX	100.00%
Prod stor location	2000	100.00%
Storage loc for EP	1116	71.43% (1116), 28.57% (2000)
Material group 1	56	100.00%
Loading Group	1	100.00%

AI-driven data and process improvement loop

- Artificial intelligence relies on the highest quality data possible to deliver accurate and consistent results
- Process automation can significantly improve initial data quality and integrity
- AI-enhanced process automation, driven by high-quality data drives higher process efficiency and even better data quality
- Higher data quality delivered by AI-enhanced process automation increasingly improves data integrity and process efficiency



Use Cases

How automation is helping enterprises optimize customer and vendor management

97%

Reduction in time to create a customer

- Agility and speed
- Increases competitive advantage

90%

Reduction in cost to process materials changes

- Lower costs
- Maintain current staffing levels
- Faster ROI

87%

Reduction in time needed to qualify vendors and materials

- Speed
- Process visibility
- Improved productivity

50%-75%

Reduction in time to market

- Agility and speed
- Increases competitive advantage

AI-driven data and process strategic value

Higher-quality data and well-governed processes support digital transformation and data integrity.

Increased efficiency & cost savings

Enhanced customer experience

Improved decision making

Competitive advantage

Questions?

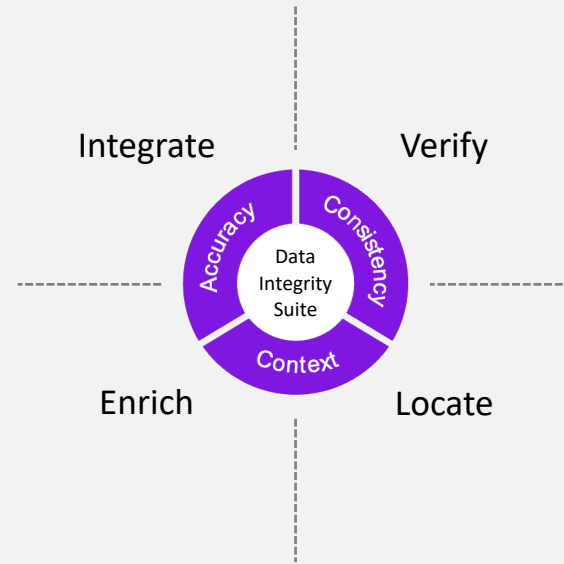
precisely

EDM Webinar 



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Brands you trust, trust us



Data leaders partner with us



12,000

customers

Customers in more than
100 countries

99

of the Fortune 100

2,500
employees

Let's continue the conversation...



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Join EDM Council and our membership community of companies...



The screenshot shows the EDM Council website homepage. At the top, there is a navigation bar with links for Membership, Frameworks, Training, Engage, Innovation, About, Sign in, and Join now. The main heading reads "Global Advocates for Data & Analytics Management". Below this, a sub-heading states "The leading global trade association providing best practices, standards and education to data and business professionals in our data-driven world." A "What we do" button is visible. On the right side, there is a "TODAY'S HIGHLIGHTS" section with three news items: "Bank of Valletta becomes the newest member to join the EDM Council", "EDM Council welcomes Webber Wentzel as its newest member", and "Lion Group joins EDM Council as its newest member". At the bottom of the screenshot, there is a banner with the text "Join a vibrant community of 25,000+ business leaders, CDOs, and data and analytics professionals across all industries." and a row of logos for Bank of England, NOVARTIS, HSBC, AWS, Schneider Electric, Microsoft, Google, and AEGON. Two buttons are present: "Explore membership" and "See all 350+ member organizations".



350+ Member Firms

Cross-industry,
including Regulators



25,000+

Professionals



Worldwide

Americas, Europe,
Africa, Asia, Australia

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