Explore the Future of Process Automation & Artificial Intelligence

AI-driven data & processes automation

A conversation with…

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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

- Storage type
- Storage locations
- Production version
- Forecast parameter
- Routing
- Recipes
- BoM
- Warehouse
- Cost roll

- Pricing conditions
- Costing
- Source lists
- Purchasing info record
- Variant configuration
- Maintenance plans
- Work center

- Employees
- Assets
- Terms code
- Functional location
- Equipment
- Maintenance plans
- Task lists
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 Quality & Consistency
- Data Creation & Management Processes
- 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

- Yes, we moved entirely to web-based UIs and primarily use Fiori apps: 13%
- Yes, we are using Fiori apps for some use cases or LOBs, but still using the SAP GUI: 57%
- Not yet, but we are planning to use Fiori in the future: 28%
- No plans to use Fiori, we will continue to use the SAP GUI: 2%
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
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

- Data & Processes
- Automation
- End-to-end process integration
- Cloud
- Process Mining
- Business Networks and cross-company collaboration
- User Experience
- Self-service
- Supply Chain Digitalization
- AI/ML
- End-to-end process integration
- Process Mining

User Experience
Self-service
Supply Chain Digitalization
AI/ML
Business Networks and cross-company collaboration
End-to-end process integration
Process Mining
Cloud
Automation
Data & Processes
AI comes in various flavors

<table>
<thead>
<tr>
<th>Goal</th>
<th>Generative AI</th>
<th>Predictive AI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create new content</td>
<td>Make accurate predictions</td>
<td></td>
</tr>
<tr>
<td>Algorithms</td>
<td>Complex algorithms and deep learning based on LLMs</td>
<td>Statistical algorithms based on machine learning and observations</td>
</tr>
<tr>
<td>Output</td>
<td>New content such as text, images, music, etc.</td>
<td>Predictions such as the likelihood of a field value or routing destination</td>
</tr>
</tbody>
</table>
Material Master Creation

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

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

1. New material creation request
2. User enters minimum number of input fields
3. AI predicts output fields based on delivered input fields
4. AI output fields are used to pre-populate and validate form fields
AI Recommendation Output
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 AI-enhanced process automation to improve initial data quality

Leverage high-quality data to improve AI recommendations for process automation
Use Cases

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

Increased efficiency & cost savings

Enhanced customer experience

Improved decision making

Competitive advantage

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

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