



James A. Davis '04



Management Consultant
Fractional CIO & Technology Advisor









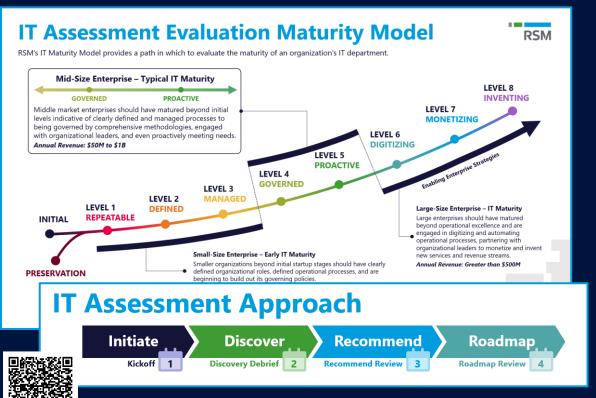
About Me



Basically, I do two things at RSM

Technology Advisory

Advise small and middle market clients in how to best align IT departments and technology to organizational needs



Learn more about IT Assessments

Fractional Chief Information Officer

<u>Lead</u> small and middle market clients in aligning IT departments and technology to organizational needs



About RSM



RSM International is a global network of independent assurance, tax and consulting firms.



First-choice advisor to middle market leaders globally

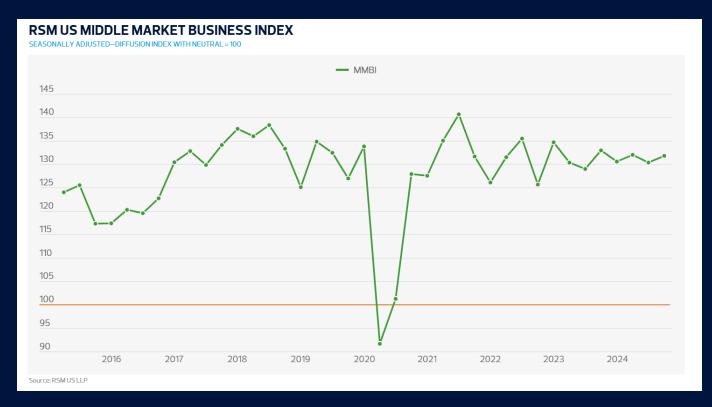
Focus on Middle Market



The middle market is the backbone of the U.S. economy, accounting for one-third of total jobs and 40% of GDP.

Middle market organizations, which make up the "real economy," are too big to be small and too small to be big. They have distinct challenges and opportunities around resources, labor, technology, innovation, regulation and more.

With proprietary research such as the RSM US Middle Market Business Index, economic insights including The Real Economy, a growing team of analysts dedicated to following trends important to your industry, and a policy arm on the ground in Washington, D.C., RSM does the legwork to keep your organization ahead of issues that affect your bottom line.







RSM US Middle Market Business Index

The Real Economy





First-choice advisor to middle market leaders globally

Focus on Middle Market Artificial Intelligence





RSM Middle Market Al Survey 2024: U.S. and Canada

78%

of middle market executives reported either formally or informally using Al. 77%

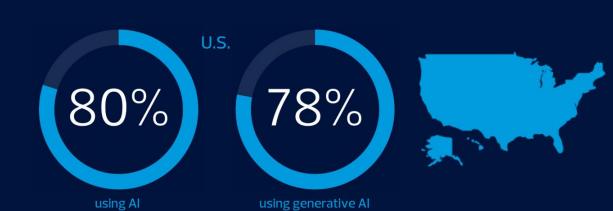
of respondents are formally or informally using generative AI within their operations.

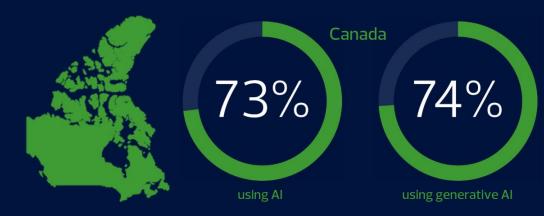
85%

of respondents either somewhat or completely agreed that generative Al has had more of a positive impact than anticipated. 54%

of executives who use generative AI said it has been harder to implement than suggested. 67%

report they need outside help to get the most out of their generative Al solutions.







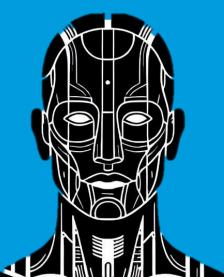


"Companies in the United States are increasing their budgets for generative AI solutions at a quicker pace than Canadian organizations, which influences the speed of implementation and integration. But the majority of companies in both countries appear poised to continue making significant operational improvements with emerging generative AI innovations."





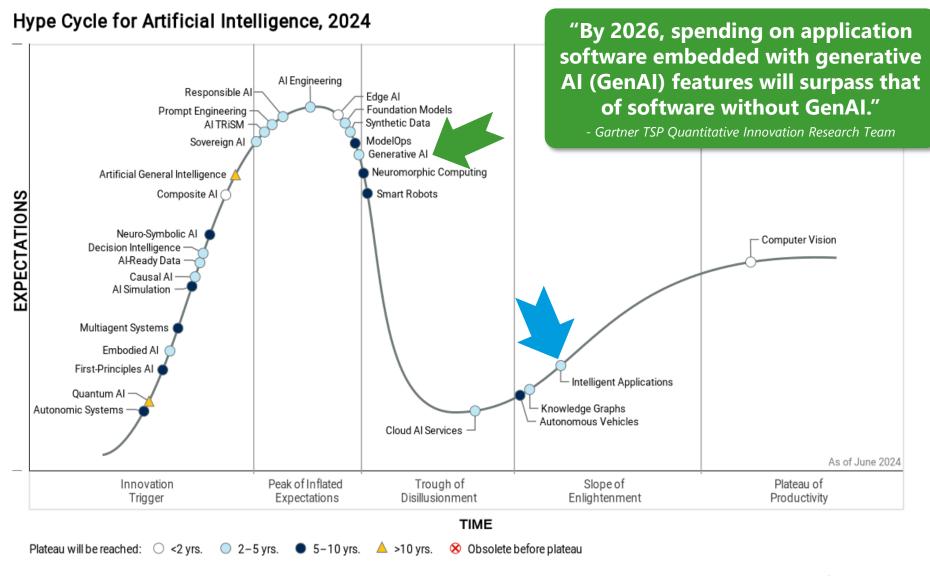
Al Powered





Mid-Market IT's Adoption of Al





Intelligent Applications

"utilize learned adaptation to respond autonomously to people and machines. While applications can behave intelligently, intelligent applications are inherently smart/proactive."

"Applications will change from supporting business process execution into intelligent applications that work on behalf of employees."

can generate new derived versions of content, strategies, designs and methods by learning from large repositories of original source content. Generative AI has profound business impacts, including on content discovery, creation, authenticity and regulations; automation of human work; and customer and employee experiences."

Gartner.



01 To Be More Efficient

Al Powers IT Departments:





Automation of Routine Tasks

Traditional IT Services

IT Service Desk

- Interacting with employees
- Triaging employee needs
- Gathering additional information
- Summarizing conversations
- Researching known solutions
- Orchestrating approval processes
- Updating employees on progress
- Provisioning permissions and privileges
- Training and educating employees
- On-call after hours support

Al Solutions



Conversational Al Chatbots or Agents



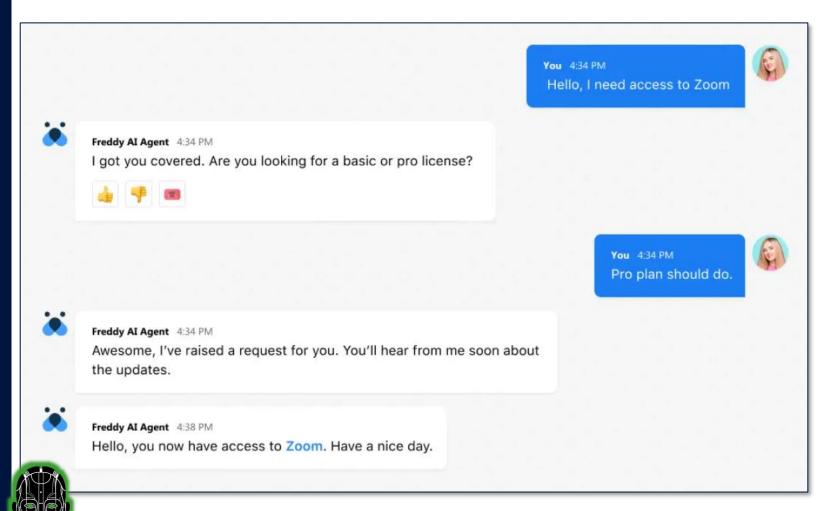


Automation of Routine Tasks

Assigning Application Permissions

IT Tool Highlight





Your employees have better things to do than wait

Freddy Al Agent delivers accurate answers and instant service, while agents focus on critical problems.

Freddy AI Agent makes it trustworthy, conversational, and convenient on collaboration channels like MS Teams and Slack.

With built-in Al agents, your employees and agents can get more done.





Automation of Routine Tasks

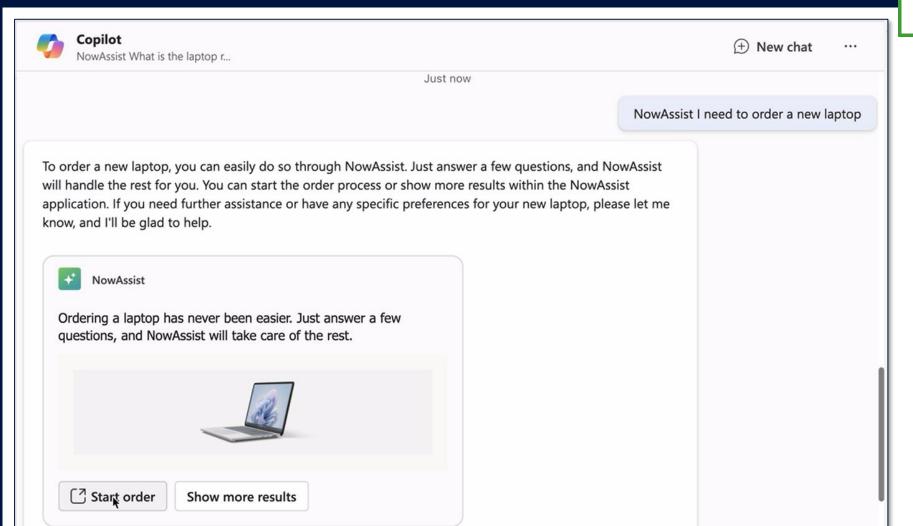
Ordering Equipment



servicenow.



Copilot



ServiceNow's Now Assist

Thanks to an ever-expanding strategic alliance, ServiceNow and Microsoft have combined their industry-leading capabilities to enhance workforce choice and flexibility.

The integration of Now Assist from ServiceNow and Copilot from Microsoft brings the power of these two GenAl assistants into one seamless solution.

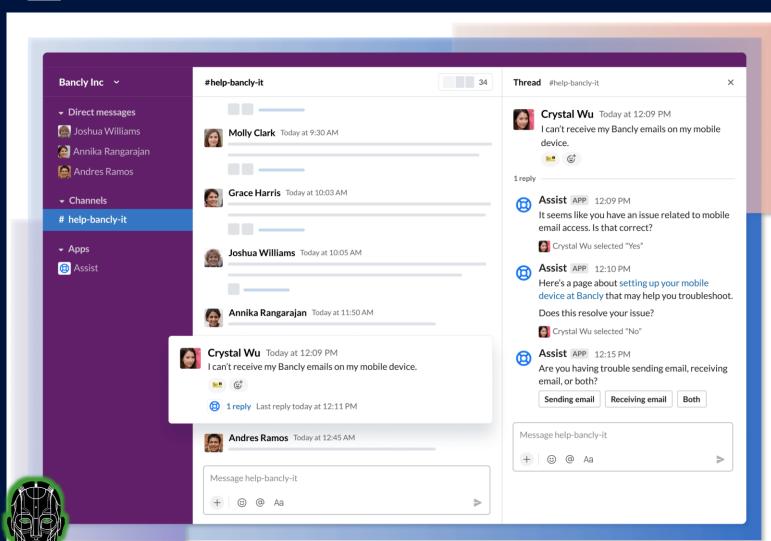




Automation of Routine Tasks

Real-Time Triaging of User Issues

IT Tool Highlight



Jira Service Management

Free up agent time to focus on the work that matters

Deflect repetitive requests and allow your team to focus on more important work. Create custom intents or tap into the power of your existing knowledge base to instantly automate Tier 1 support workflows.

For complex issues that need a human touch, route tickets to the right team with pre-gathered context.





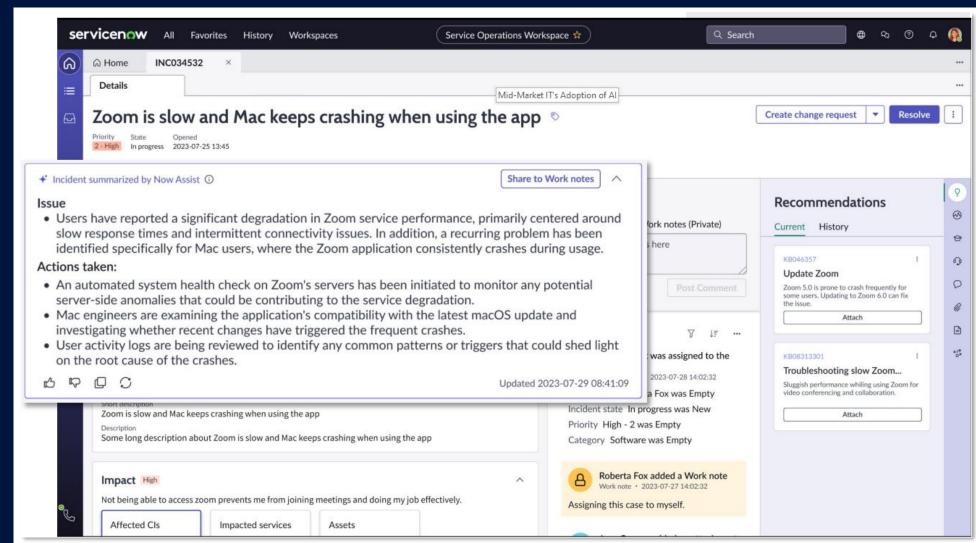
Automation of Routine Tasks

Incident & Actions Summarization



servicenow.

IT Tool Highlight



ServiceNow's Now **Assist** for ITSM provides context and streamlines work allowing IT staff to spend more time resolving complex issues.







Minimization of Human Error

Al Solutions Traditional IT Services IT Service Desk • Drafting support responses • Recommending likely solutions **Conversational Al Chatbots or Agents Communication & Collaboration** • Drafting departmental communications • Drafting collaborative emails



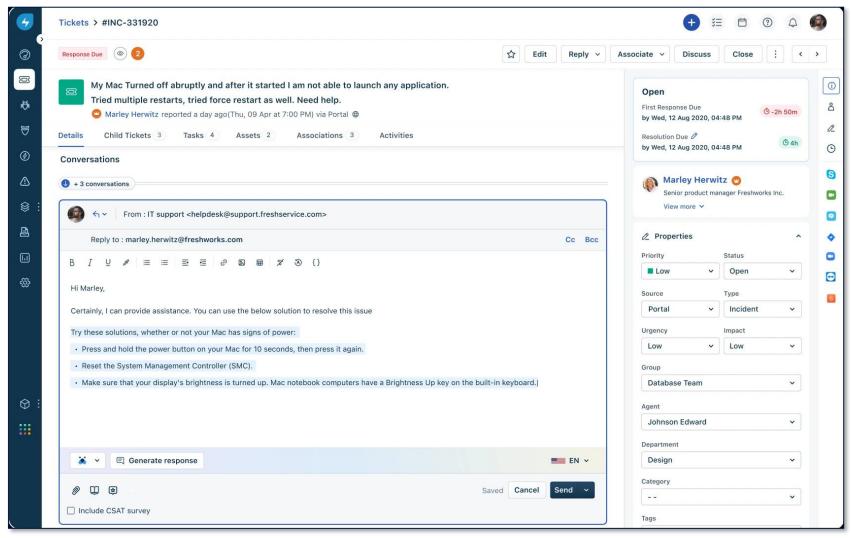


Minimization of Human Error

Support Response Drafting







Focus where you're needed. Freddy AI Copilot does the rest.

Hello, productivity. Freddy Al Copilot makes it easy for agents to standardize services, draft articles, improve messages, automate responses, and optimize processes.

With Freddy AI to help, agents can focus on service excellence.





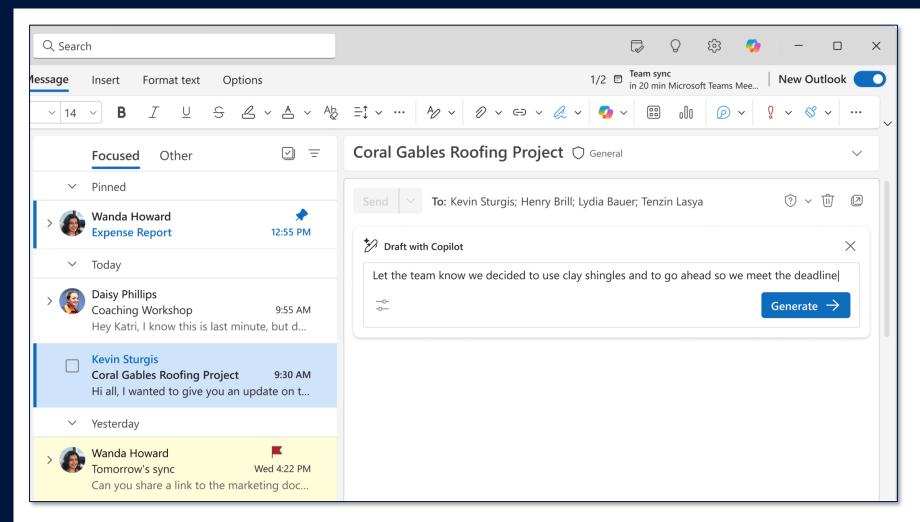


Minimization of Human Error

Email Communication Drafting







Start Emails Quickly

Save time and eliminate common grammatical mistakes preparing emails with Copilot for Outlook

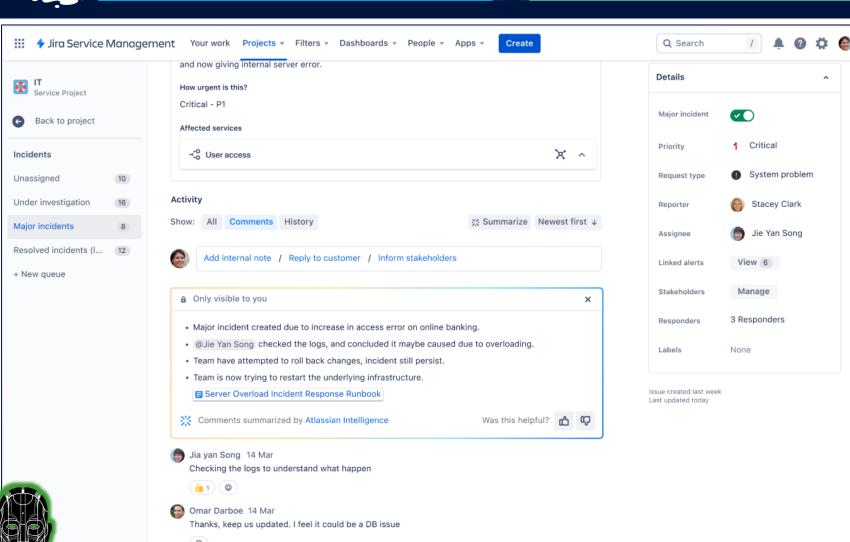




Minimization of Human Error

Next Step Recommendation

IT Tool Highlight



→ Jira Service Management

Triage and respond to requests faster

Accelerate agent workflows from triaging to resolution.

Get Al-powered recommendations to prioritize, assign, and take action on tickets.

Summarize ticket descriptions and comments to bring stakeholders up to speed, and transform your writing to ensure fast, clear communication.

Source: https://www.atlassian.com/software/jira/service-management/features/itsm/ai

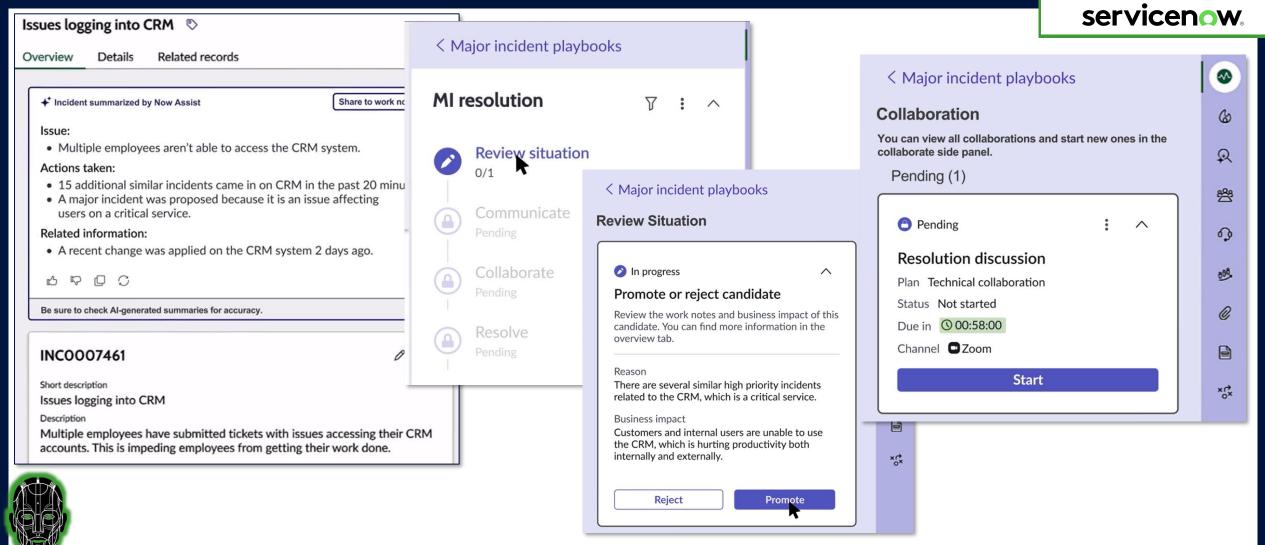




Minimization of Human Error

Guided Runbook Walkthroughs

IT Tool Highlight



Source: https://www.servicenow.com/now-platform/now-assist.html





Incident Detection Automation

Traditional IT Services

Incident Management

- Grouping similar alerts
- Recognizing incident in progress
- Communicating with and engaging incident response team

Al Solutions



Semantic Similarity Comparison within Natural Language Processing



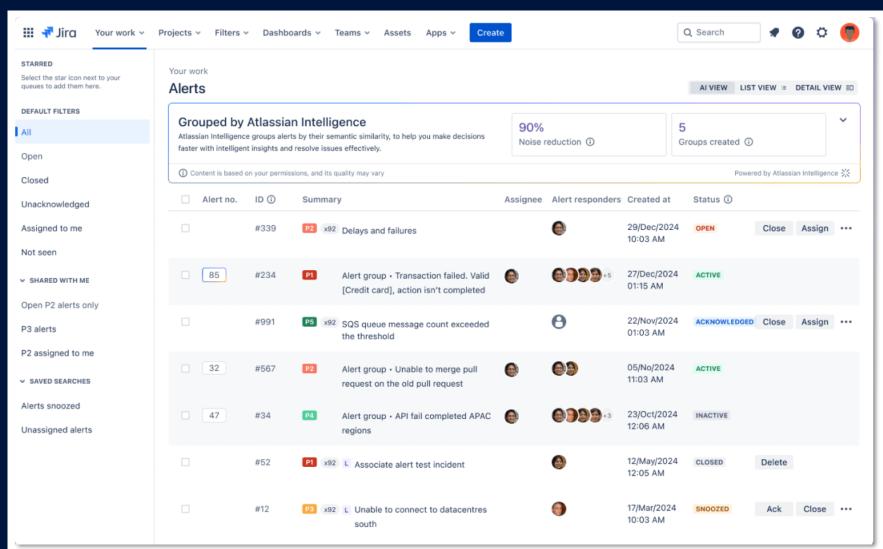




Incident Detection Automation

Alert Analysis & Aggregation

IT Tool Highlight



Jira Service Management

Detect, prevent, and resolve incidents faster

Accelerate incident management workflows with AlOps capabilities.

Cut through the noise to surface the alerts that matter, quickly loop in the right stakeholders, and automate action for fast resolution.



Source: https://www.atlassian.com/software/jira/service-management/features/itsm/ai





Traditional IT Services

Project Planning

- Building work breakdown structures of phases, tasks, and sub-tasks
- Sequencing tasks to optimize timelines
- Allocating personnel based on availability

Al Solutions



Machine Learning and Natural Language Processing



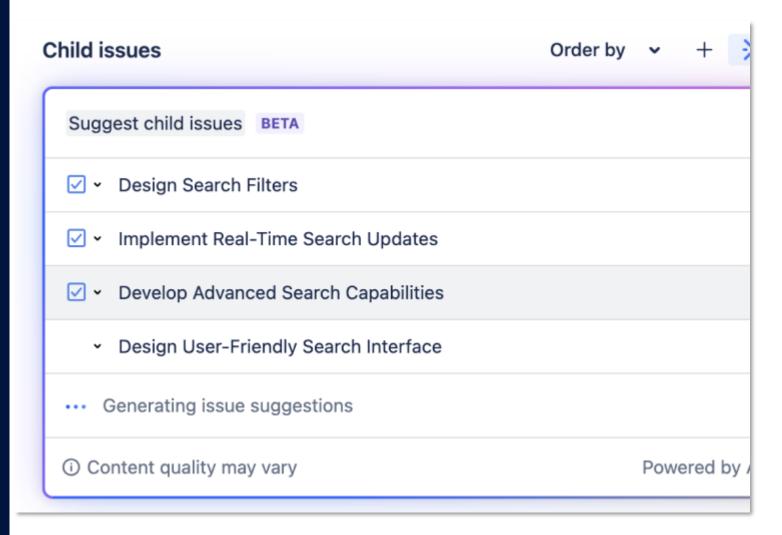


Plan Projects

Work Item & Subtask Recommendations

IT Tool Highlight





Move projects forward

Let Atlassian Intelligence recommend subtasks and relevant work items with a click.





Find Information & Answers

Traditional IT Services

Knowledge Management

- Find solutions and documentation
- Answer questions about IT systems
- Summarize information
- Streamline workflows and human tasks

Technical Training & Research

- Step-by-step technical instruction
- Apprenticing and teaching

AI Solutions



Natural Language Processing



Al Vision





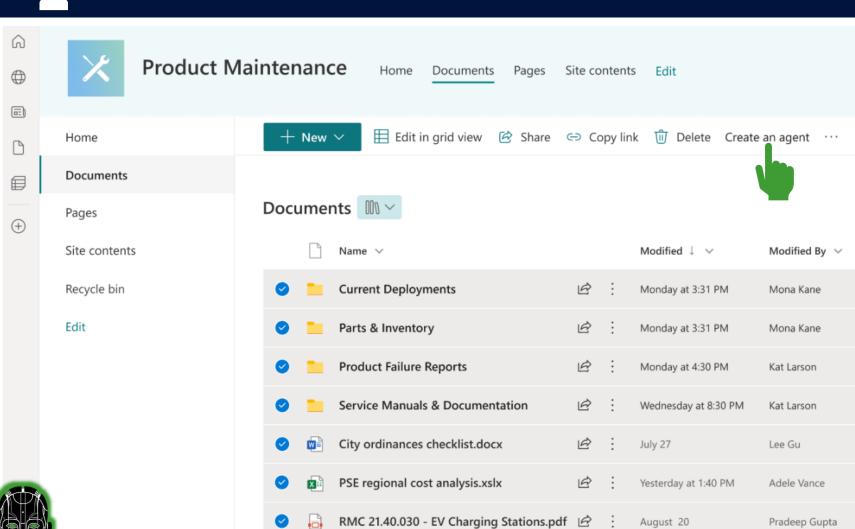


Find Information & Answers

Information Analysis & Curation

IT Tool Highlight

SharePoint



Find Answers with SharePoint Agents

Every SharePoint site comes with a "ready-made-agent", automatically scoped to the content on that site.

Copilot

Site visitors can chat with this agent to understand content on this site, ask specific questions, and analyze documents.

Source: https://www.atlassian.com/platform/artificial-intelligence



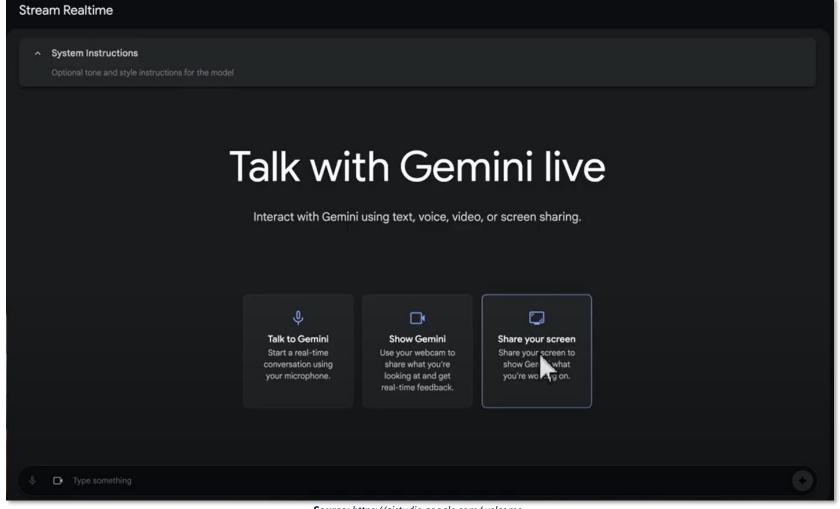


Find Information & Answers

Step-By-Step Technical Training

IT Tool Highlight

Google Al Studio





Source: https://aistudio.google.com/welcome



01 To Be More Efficient

Al Powers IT Departments:

02 To Be More Secure





Secure IT Systems

Traditional IT Services

Threat Detection & Response

- Reviewing system alerts and event logs
- Eliminating false positives
- Recognizing cyber attacks
- Investigating and stopping attacks

Threat Prevention

- · Malware detection and removal
- Identifying and blocking phishing websites
- Vulnerability prediction





Advanced Machine Learning Trained on Vast Amounts of Security Data





Secure IT Systems

Threat Detection / Prevention





Featured Threat Prevention Engines

Engine Name	Security value	Method	Technology
DeepTunnel	DNS Tunneling	Al	Deep Learning
Ditto - Detect Malware & phishing (DeepPDF)	Detect Malware according to PDF layout	Al	Machine Learning
Brand spoofing detection	Detect Phishing websites using image similarity	Al	Machine Learning
Mobile Zero-Phishing detection engine	Mobile Zero-Phishing detection engine	Al	Machine Learning
Zero-Phishing	Detection of zero-day Phishing websites based on page content	Al	Machine Learning
Memdive	Dynamically extract the hidden malicious payloads out of process memory	Al	
ThreatCloud graph	Deciphers complex attack patterns	Al	
TEX – Exploitable content Disarm and reconstruction	Remove Active Content from Documents	Traditional	Traditional
IPFS	Scans the URL and detects suspicious IPFS patterns	Traditional	Traditional





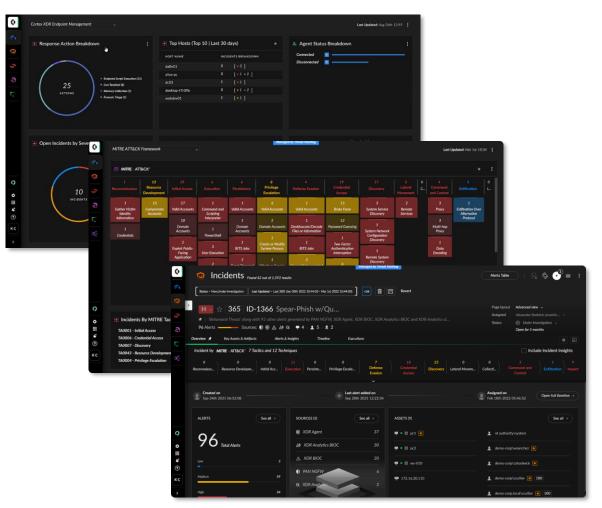
Secure IT Systems

Threat Detection / Prevention

IT Tool Highlight











Secure IT Systems

Al Tooled Managed Services





Industry Leader CrowdStrike offers 2 Managed Services

CrowdStrike Falcon Complete Next-Gen MDR

A fully managed detection and response (MDR) service offering 24/7 expert management and monitoring of the CrowdStike Falcon platform.

CrowdStrike Falcon Cloud Detection and Response (CDR)

An integrated, comprehensive cloud protection solution that brings effective and comprehensive CDR including cloud native application protection platform capabilities





01 To Be More Efficient

Al Powers IT Departments:

02 To Be More Secure

03 To be More Innovative





Contextually Evaluate & Generate Code

Traditional IT Services

Software Development & Testing

- Code Generation & Debugging
- Comment & Commit Message Generation
- Peer Code Reviews
- Quality Assurance Testing

Data Analysis & Analytics

- Analyzing Data
- Report Generation
- Analytical Dashboard Generation
- KPI Trending and Analysis

AI Solutions



Natural Language Processing



Generative Al







Contextually Evaluate & Generate Code

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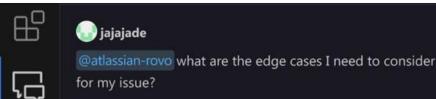
Code Analysis / Review











GitHub Copilot using @atlassian-rovo

4 sources >

Looks like you're working on STK-122, updating the color picker component in stackies-frontend.

Here are some edge cases to consider when updating this component:

- Invalid hex code (handle cases where the user enters an invalid hex like #GGG)
- Out-of-gamut colors (restrict to in-gamut colors or warn the user)
- Browser support (some older browsers don't support the latest CSS color methods)
- Default color (which color to default to on component load)

```
const DisabledColorBox = styled
         filter: grayscale(100%);
41
        border: 1px solid gray;
42
      const Button = styled.button`
        margin-top: 20px;
       function ColorPicker({ colors
         const [selectedColor, setSele
      color.disabled).color);
        const settings = {
54
           dots: true,
           infinite: false,
           speed: 500,
           slidesToShow: 3,
           slidesToScroll: 1,
           initialSlide: 0,
           centerMode: true,
           focusOnSelect: true,
           beforeChange: (current, nex
```

Bring context to code by integrating the GitHub Copilot extension with Atlassian.

Get instant code suggestions tailored to your team's design rules, Jira tasks, and more all within the IDE.







Contextually Evaluate & Generate Code

Code Generation

IT Tool Highlight



User

Can you write the code to download a dataset from S3 and read it using Pandas?



Sure, here's an example Python code to download a dataset from Amazon S3 and read it using Pandas: [1]

```
import os
import boto3
import pandas as pd
# Set up AWS credentials and S3 client
aws access key id = os.environ.get('AWS ACCESS KEY ID')
aws_secret_access_key = os.environ.get('AWS_SECRET_ACCESS_KEY')
s3 = boto3.client('s3',
                  aws access key id=aws access key id,
                  aws_secret_access_key=aws_secret_access_key)
# Specify the S3 bucket and file name
bucket name = 'XXXXXXXXXXXXXXXXXXXXX
file name = 'your-file-name.csv'
# Download the file from S3
s3.download_file(bucket_name, file_name, file name)
# Read the downloaded file into a Pandas DataFrame
df = pd.read_csv(file_name)
# Print the first few rows of the DataFrame
print(df.head())
```

Amazon Q Developer in SageMaker Studio is a generative Alpowered assistant built natively into the SageMaker JupyterLab experience. This assistant takes your natural language inputs and crafts a tailored execution plan for your ML development lifecycle by recommending the best tools for each task, providing step-by-step guidance, generating code to get started, and offering troubleshooting assistance when you encounter errors.

Here's how the code works:

- 1. First, we import the required libraries: os for accessing environment variables, boto3 for interacting with AWS services, and pandas for data manipulation
- We set up the AWS credentials by fetching the AWS_ACCESS_KEY_ID and AWS_SECRET_ACCESS_KEY from environment variables. It's recommended to use environment variables or a secure credentials store instead of hardcoding credentials in your code.
- 3. We create an S3 client using the boto3.client function and pass the AWS credentials.
- 4. We specify the S3 bucket name and the file name we want to download. [2]
- 5. We use the download_file method of the S3 client to download the file from the S3 bucket to the local file system.
- 6. We use pd. read_csv to read the downloaded file into a Pandas DataFrame
- 7. Finally, we print the first few rows of the DataFrame using the head() method.

Make sure to replace 'your-bucket-name' and 'your-file-name.csy' with the actual bucket name and file name of your dataset in S3.

Note: This code assumes that you have the necessary permissions to access the S3 bucket and download the file. If you encounter any issues, please check your AWS credentials permissions.





Contextually Evaluate & Generate Code

Analytics Generation

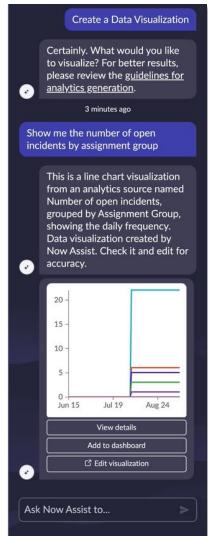
Workspaces :

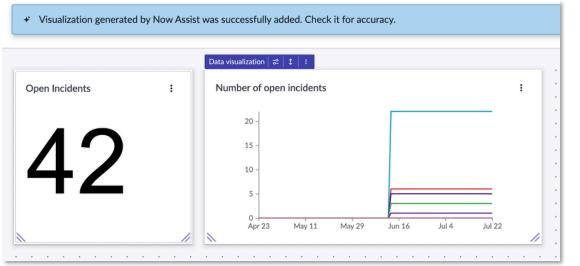
IT Tool Highlight

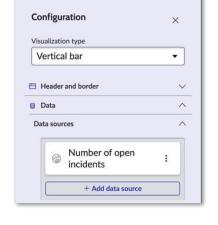


+ Add

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	Sorting
	Date range
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	Presentation
	Display settings
-	

Metric

Number of open

Assignment Group

Add alternative group by (0)

incidents

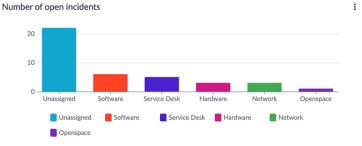
≈ Format values





IT Management Dashboard -

All Favorites



Platform Analy



01 To Be More Efficient

Al Powers IT Departments:

02 To Be More Secure

03 To be More Innovative





IT departments will be the HR department of Al Agents

Jensen Huang, Nvidia CEO



Thanks, and Gig 'Em, Aggies!





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THE POWER OF BEING UNDERSTOOD ASSURANCE | TAX | CONSULTING



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