



AUTOMATED INSIGHTS
CONSULTING LLC

GTM Materials



The Team

Weston Prohaska, CPA



- BS/MS - Accounting
- Two years in Tax with KPMG
- Three years as a data analytics and automation consultant
- Will help you understand what effective and efficient analytics look like from the ground up

David Salinas



- BS - Business Analytics and Information Systems
- Six years of developing data analytics solutions utilizing Power BI, Tableau, Alteryx, Python, and Data Factory
- Experience Managing analytics group at a fortune 500 company

Tyler Simpson, MBA



- MBA - Finance and Business Analytics
- BS/MS - Mechanical Engineering
- Certified Data Scientist
- Five years of modeling and automation with Python and Excel
- CFA Level II Candidate



THE IMPORTANCE OF DATA TRANSFORMATION, ANALYTICS, AND AUTOMATION

Predictive, insightful, enterprise-level data visualized in a way people can understand



Real-time results and predictive forecasts



Integrated and trustworthy data



Easily identified areas of opportunity



Cross-functional alignment and visibility to gain competitive edge

Reporting & Analytics Framework

The real challenges to enhanced reporting are often “below the water-line”

Reporting

- Financial Reporting
- Operational KPIs

Enhanced Reporting Characteristics:

- Automated & Accurate
- Real Time
- Prescriptive (Action focused)
- Visual/Integrated Dashboarding
- Predictive vs. Historical

1

Planning & Analytics
Budgeting & Forecasting

2

Financial Consolidation



GL #1

GL #2

GL #3

3

Data Consolidation



IT

Salesforce

HR

Inventory

Marketing

4

Day-to-day transactional and financial data, systems, & processes

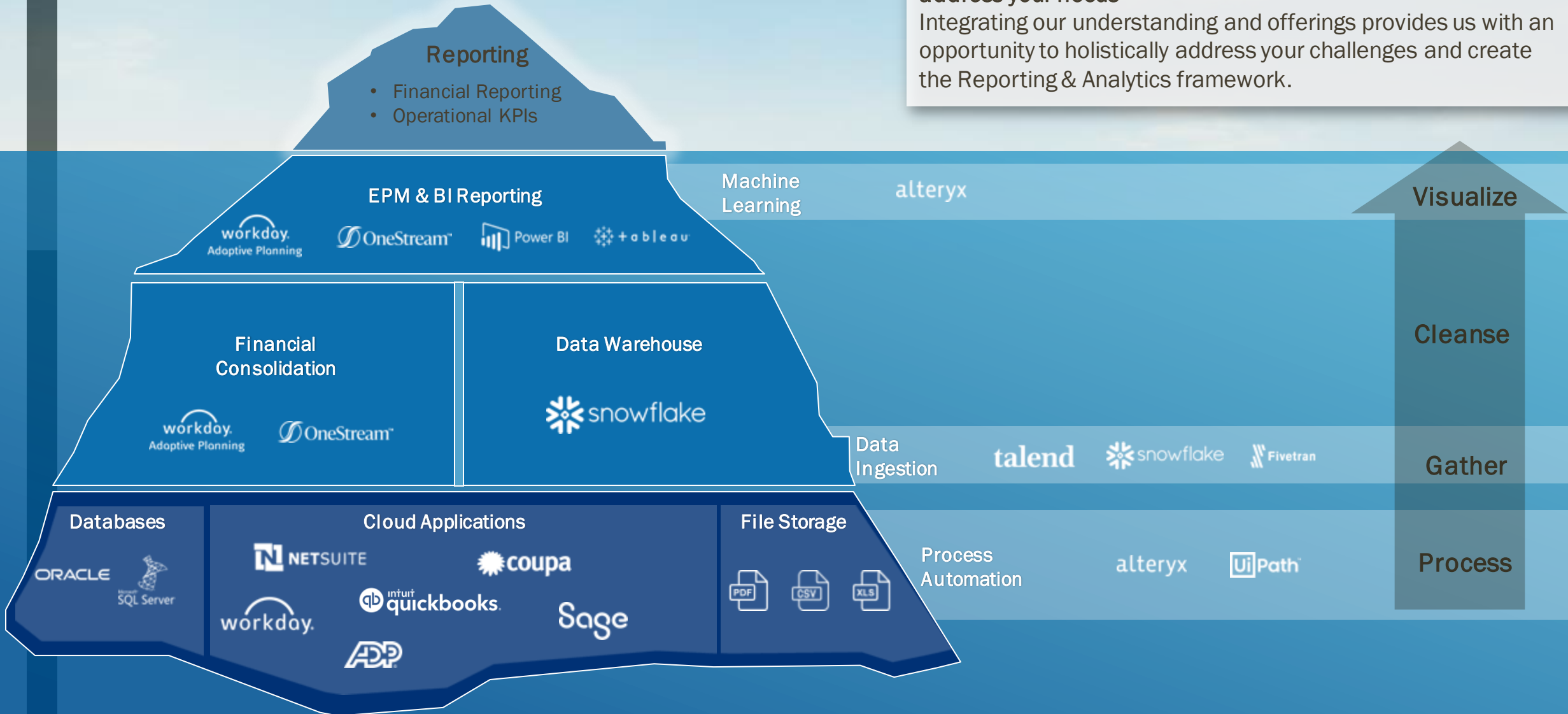
R&A Common Challenges

- Increasing investor and **high-level expectations** around “enterprise insights” and non-financial data
- Uneven, **unreliable data** that is not commonly defined, governed or “clean”
- **Inaccurate forecasts** limiting the ability to produce trend lines and advise on strategic decisions
- Siloes between CIO/IT and Finance, leading to **data ownership** questions
- Need to digitally **upskill internal talent** with data engineering and dashboarding capabilities

Reporting & Analytics Framework

The real challenges to enhanced reporting are often “below the water-line”

Bringing the best of data & financial expertise together to address your needs
 Integrating our understanding and offerings provides us with an opportunity to holistically address your challenges and create the Reporting & Analytics framework.





CAPABILITIES

289.33

289.33

Data Transformation & Analytics

We aim to design, build, and deploy leading data, analytics, and automation programs that generate rapid ROI across the enterprise

Data Strategy

- Data Management
- Enriched Data Quality
- Data Centralization
- Data Process Optimization
- Proactive Analytics and Insights “Metrics That Matter”
- Data Literacy and Culture

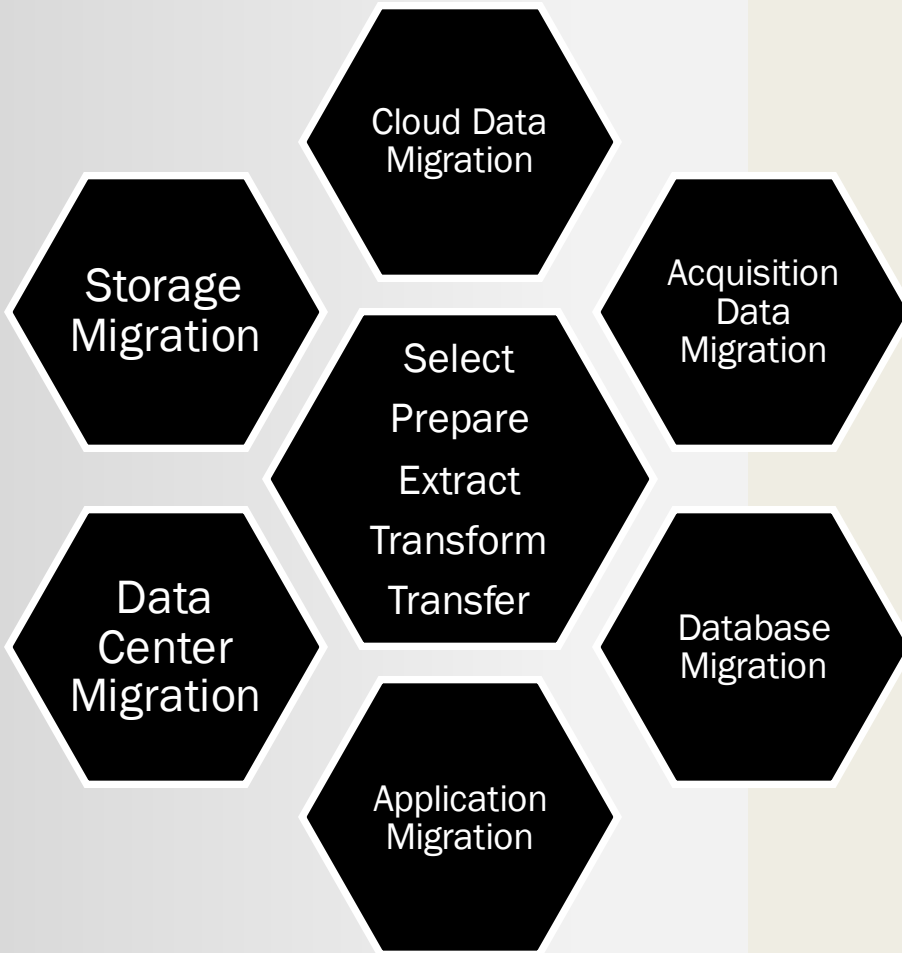
Data Migration

- Cloud Warehouse Migration
- Data & Document Retention
- Cleansing & Transformation
- Data Pipeline Automation
- Validation and Accuracy Testing

Automation Programs

- Analytics Process Automation
- Automation Strategy
- Automaton Governance
- Automation Upskilling
- Automation Operations

Data Migration

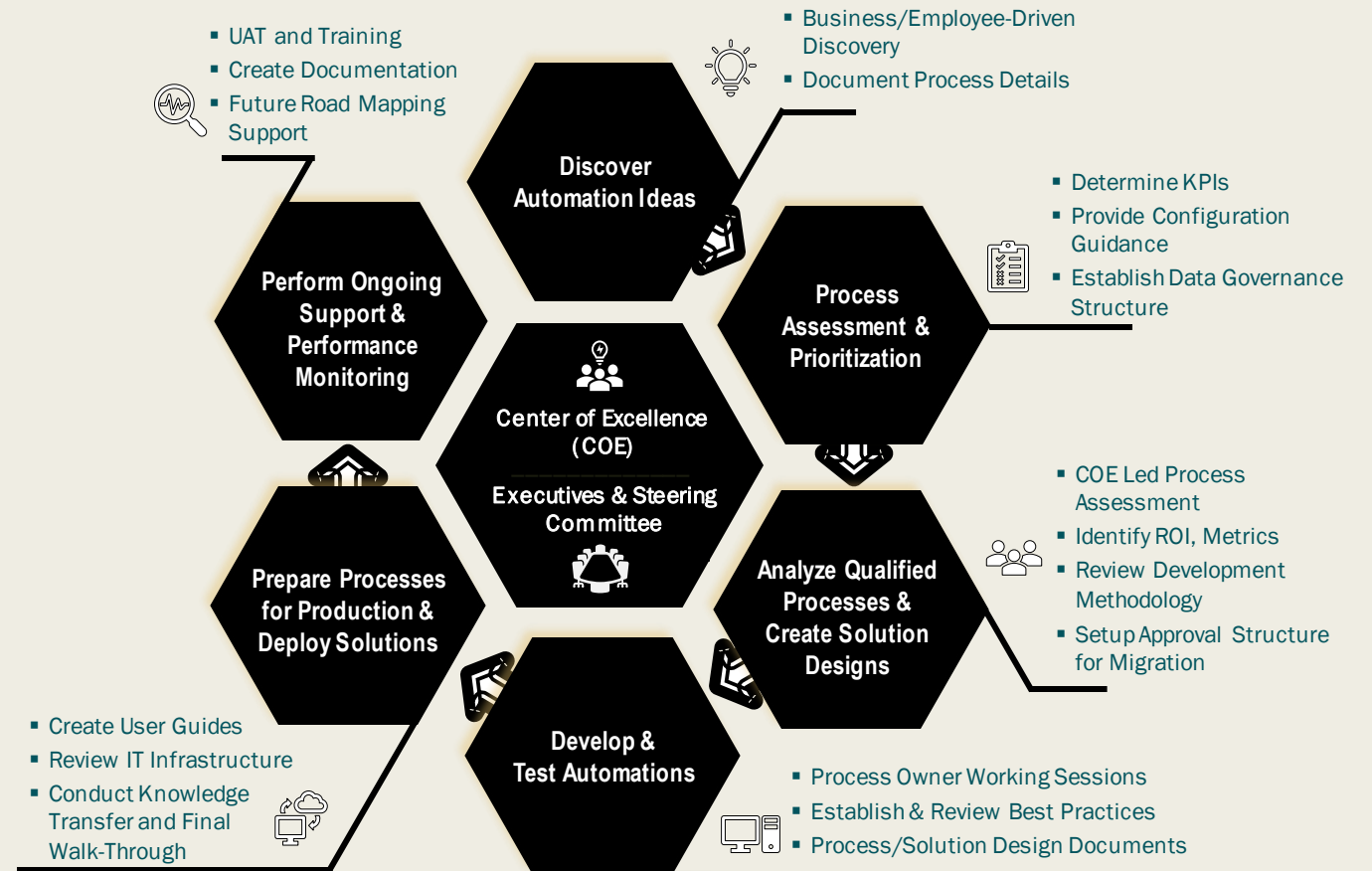


-  Lack of planning, communication and coordination with business stakeholders and data owners before, during and after migration can cause unintended consequences for an organization
-  Without the appropriate tools and specialized skillsets issues arise, especially in large scale migrations. Going it alone can be tempting but there is a real risk of data loss or corruption that adversely impacts your initiative
-  Planning should help uncover all dependent datasets, but nothing is guaranteed. Unforeseen dependencies can lead to delays and added cost, especially where a target destination is TBD. Relying on a trusted methodology reduces the risk of delay and overrun.
-  Poor project management or unproven methodology on data migration initiatives can impact day-to-day activities. Trying to run business-as-usual activities while managing the process can often lead to failure on multiple fronts.
-  Insufficient coordination on data ownership, user rights and permission types can introduce the risk of faulty or incomplete data being used. Remediation can be a lengthy process. Including data owners and stakeholders in the planning for their data is a critical step.

Automation Programs

> The mission of 'AIC' is to **deliver 'future-ready' transformational change** built upon market-leading automation platforms, with outcomes managed by our market-proven program-led automation approach fueling a rapid return on investment.

By assessing each organization's unique position— we produce impactful meaningful, and lasting results for our clients.



“ The rise of automation adoption has led to technology leaders rediscovering process analysis and improvement to scale automation beyond tasks toward end-to-end process automation

FORRESTER®