



BTERRELL GROUP

SOFTWARE • CONSULTING • TRAINING • DEVELOPMENT

Introductions



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My Focus

High growth professional service companies

My Experience

27 years automating small to mid sized companies



Artificial Intelligence Continuum : *What is it?*



Robotic Process

Structured data
Digital format
Rule based
Repetitive

DO



Cognitive Computing (aka Machine learning)

Less structured data
Trial and error
Refine rules over time as
learning progresses

LEARN



Artificial Intelligence

Unstructured data
Mass computing power
Contextual linking
Narrow use case

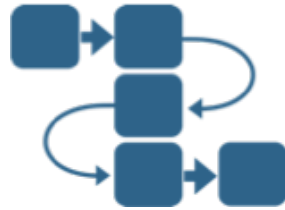
THINK



Robotic Process Automation: *What is it?*



Commercial Software that is installed on machines that reside in a data center server



Simulates rule based data management activities on command



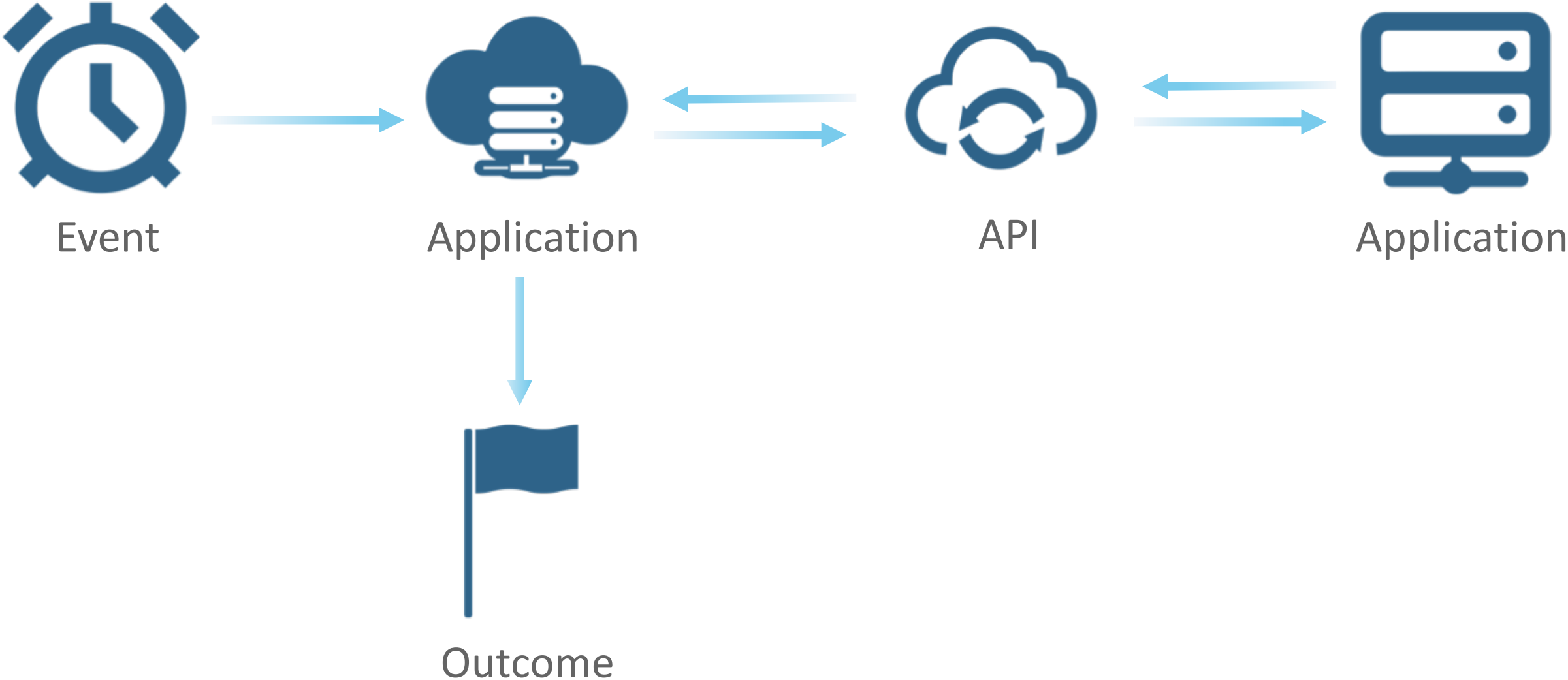
Integrates at the User Interface



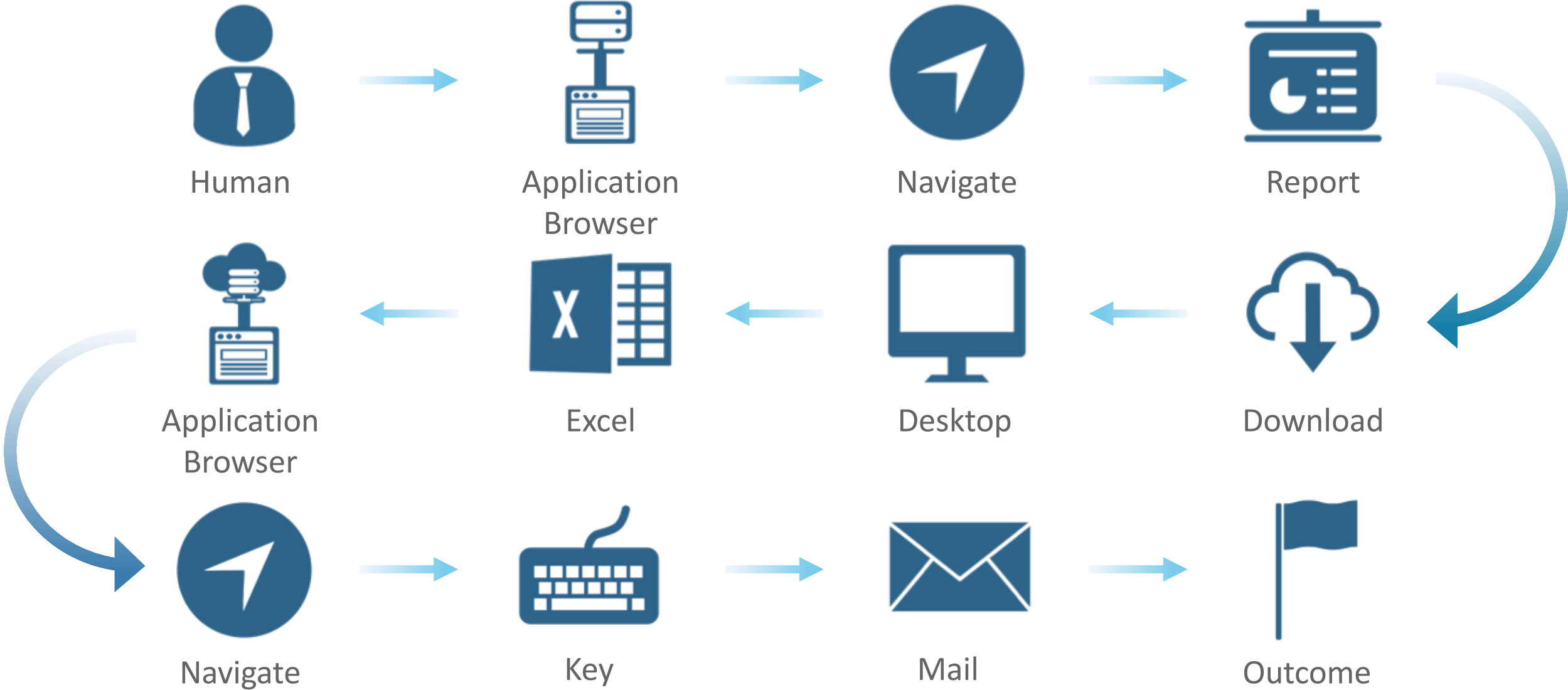
Requires no software code and is non-invasive



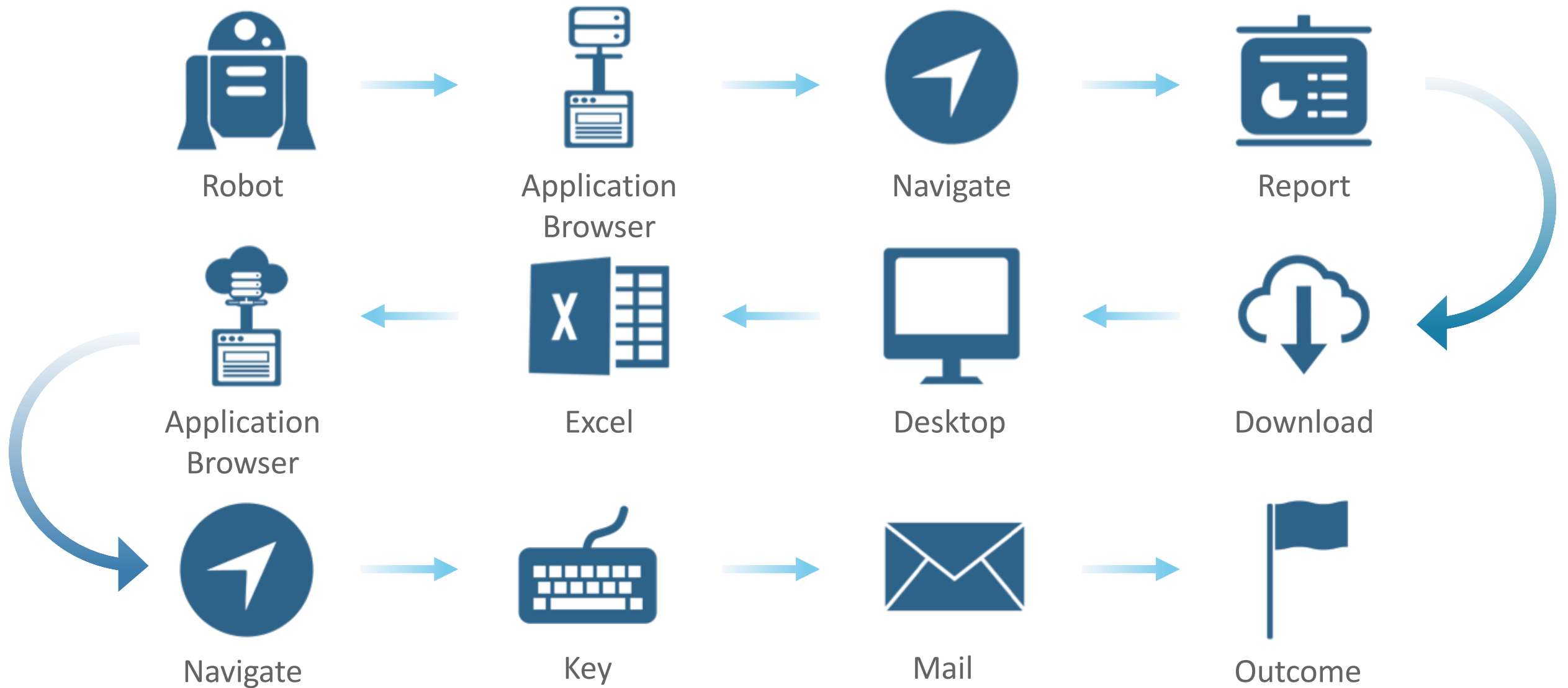
Robotic Process Automation: *What is it?*



Robotic Process Automation: *What is it?*



Robotic Process Automation: *What is it?*



Robotic Process Automation: *Opportunity*



Data
Collection &
Preparation



Data
Validation



Data Entry &
Correction



Operational
Insight



Operational
Fluctuation



Robotic Process Automation: *Opportunity*

General Business Examples

Employee onboarding
Password resets
Account reconciliation
Compliance reporting
System integration
A/P invoice entry
Claims verification
EFT or ACH processing

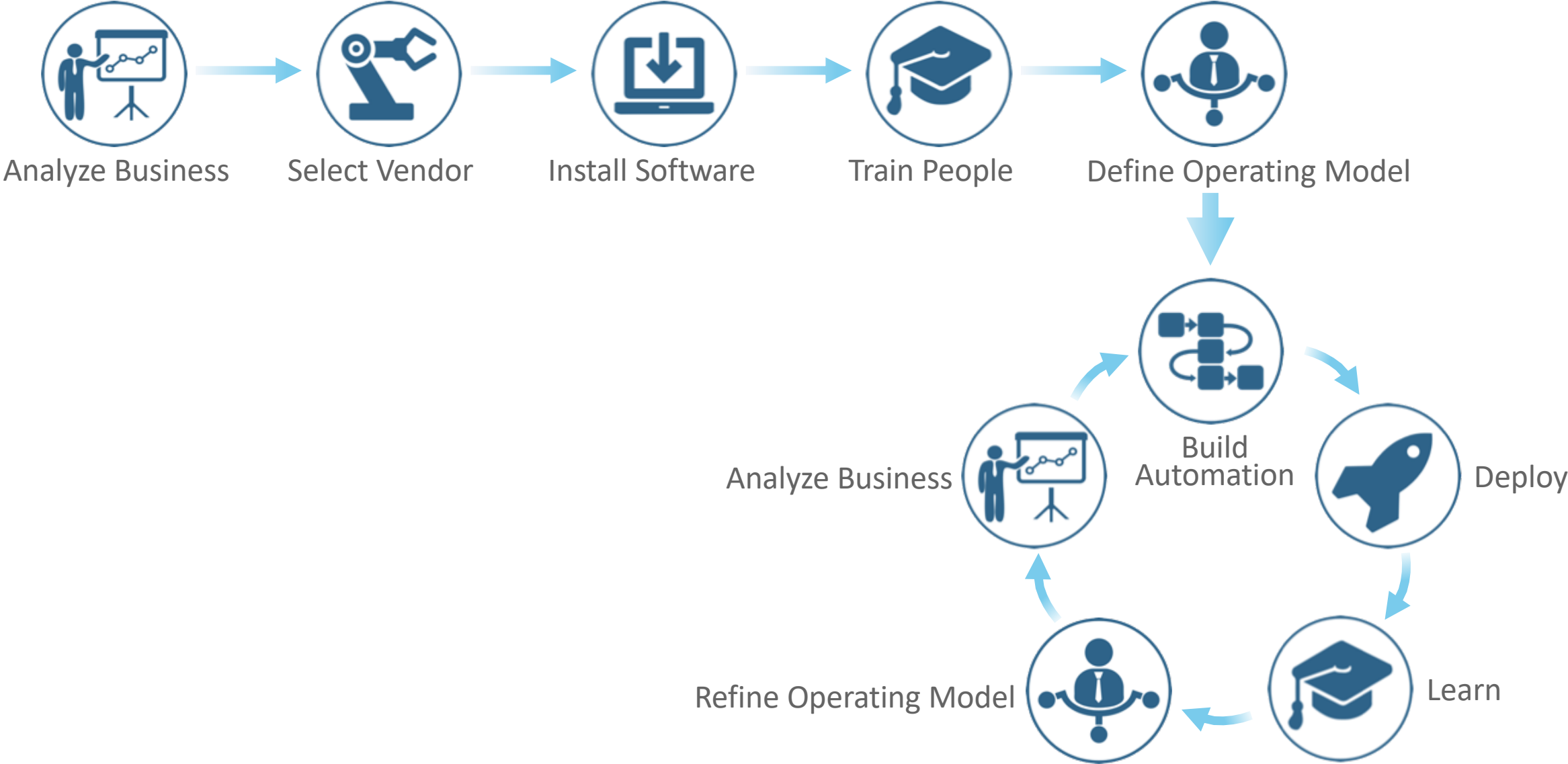
Rekeying data (“dirty” interface) – no APIs
Add missing functionality to a system
One person enters data from multiple systems

Payroll tax deposits
Account verification
Customer service
Social media review
Web data collection
Document management
Industry reporting
Chat bots

Review all files for a certain issue
Convert unstructured data to structured data
Manual checking, decisions and calculations



Robotic Process Automation: *How To Implement*





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Solutions



Enterprise
Resource
Planning
(ERP)



Customer
Relationship
Management
(CRM)



Human
Capital
Management
(HCM)



Robotic
Process
Automation
(RPA)



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Solutions

AICPA Business Solutions | Preferred Provider of Financial Applications

 **sage** Intacct

Enterprise
Resource
Planning
(ERP)



Customer
Relationship
Management
(CRM)

workforce go!

Human
Capital
Management
(HCM)

blueprism



Robotic
Process
Automation
(RPA)