precisely

# Applying Hyperautomation to drive business success

Hyperautomation for complex, data-intensive SAP® processes

# Agenda

- Automation, hyperautomation and digital transformation
- Artificial intelligence in automation
- The value of an automation platform
- Key takeaways
- About Precisely

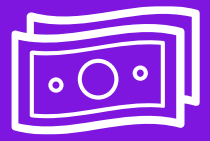
# Automation, hyperautomation and digital transformation

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

- HfS Blog

# Accelerating digital transformation

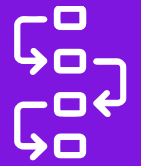
Data is the fuel for decision-making today



$1.04 trillion spent on Hyperautomation by 2026

80% of CEOs accelerating digital transformation

67% spending more on technology than people



45% of enterprises using SAP are leveraging automation

Market is growing at 12% per year

# Customer needs:

Be more agile

Go faster

Improve the quality and integrity of your most important data

# The need for improving financial data quality

<22%

Of senior finance executives said they were entirely confident in the accuracy of the data they hold and analyze as part of their role.

KPMG – Facing Forward: The Evolution of the Modern Finance Leader

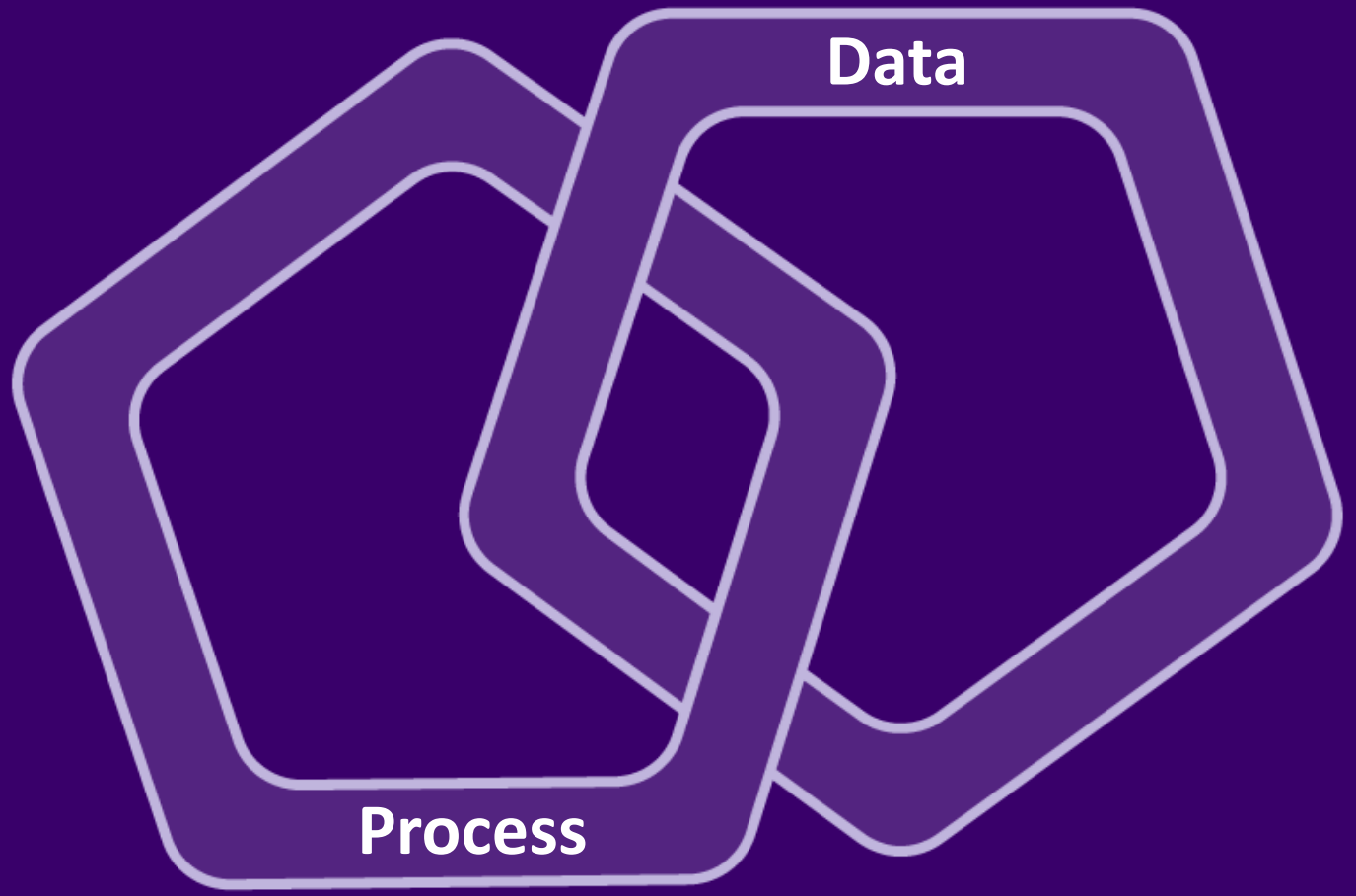
# Customer wants:

Optimize staff

Reach ROI faster

Realize Digital Transformation dream

# Interdependence of process and data



# Hyperautomation?

**Hyperautomation** is a business-driven, disciplined approach that organizations use to rapidly identify, vet and automate as many business and IT processes as possible. It involves the orchestrated use of multiple technologies, tools or platforms

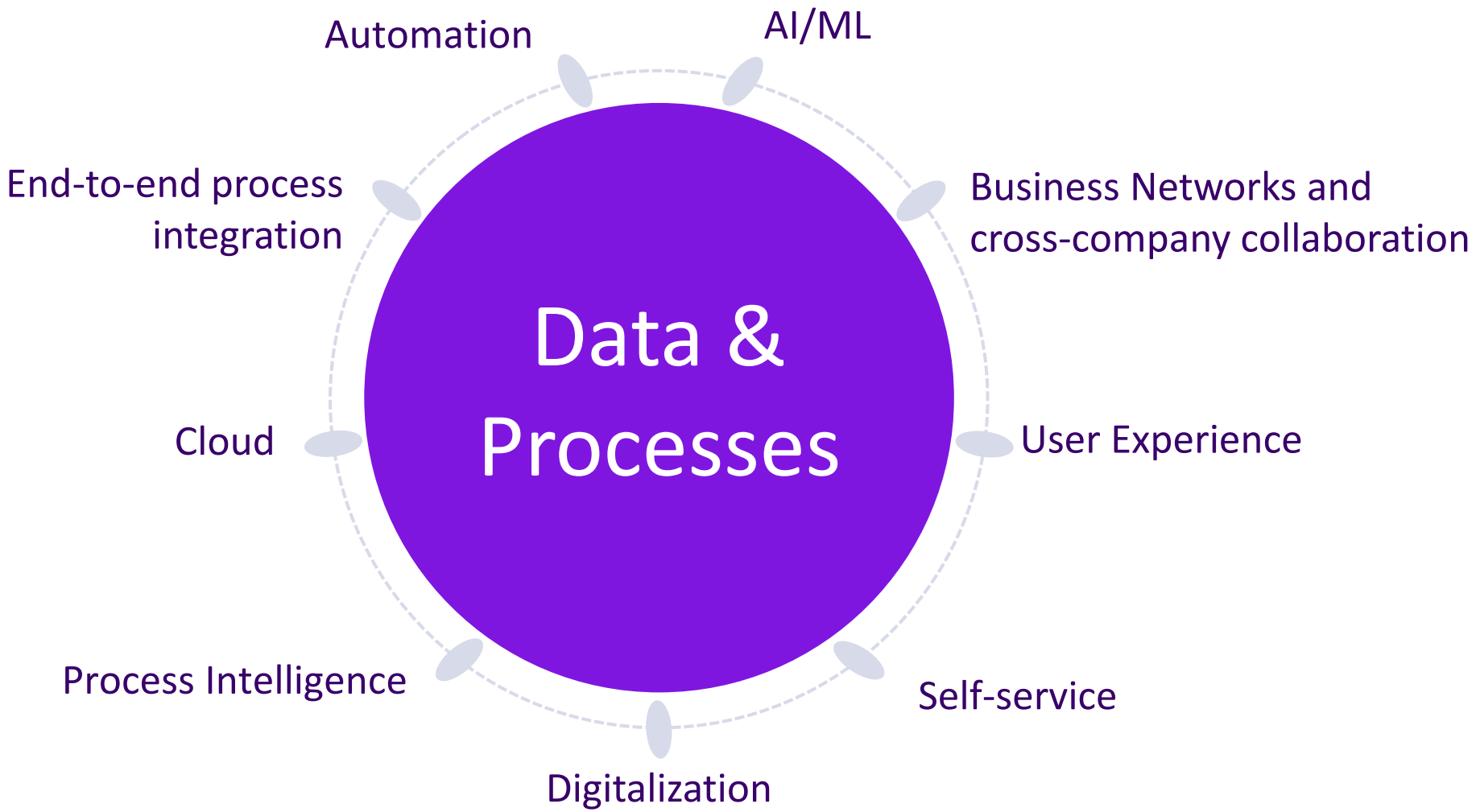
Gartner

**We have Blue Prism and Precisely Automate and we choose the best tool on a case-by-case basis.**

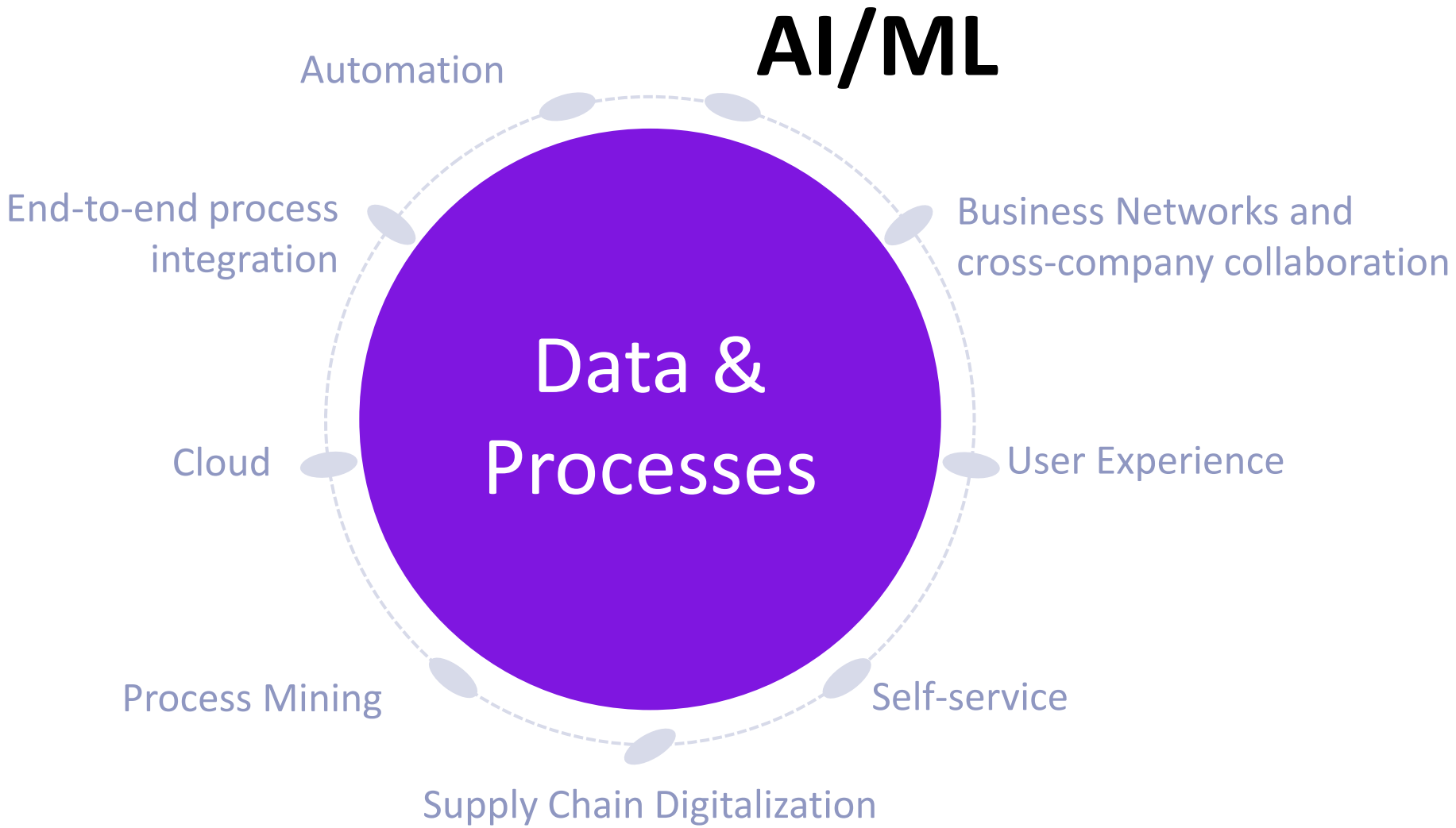
**Robotics Program Director** – Global beverage and spirits company

# Artificial Intelligence

# Digital Transformation journey



# Digital Transformation journey



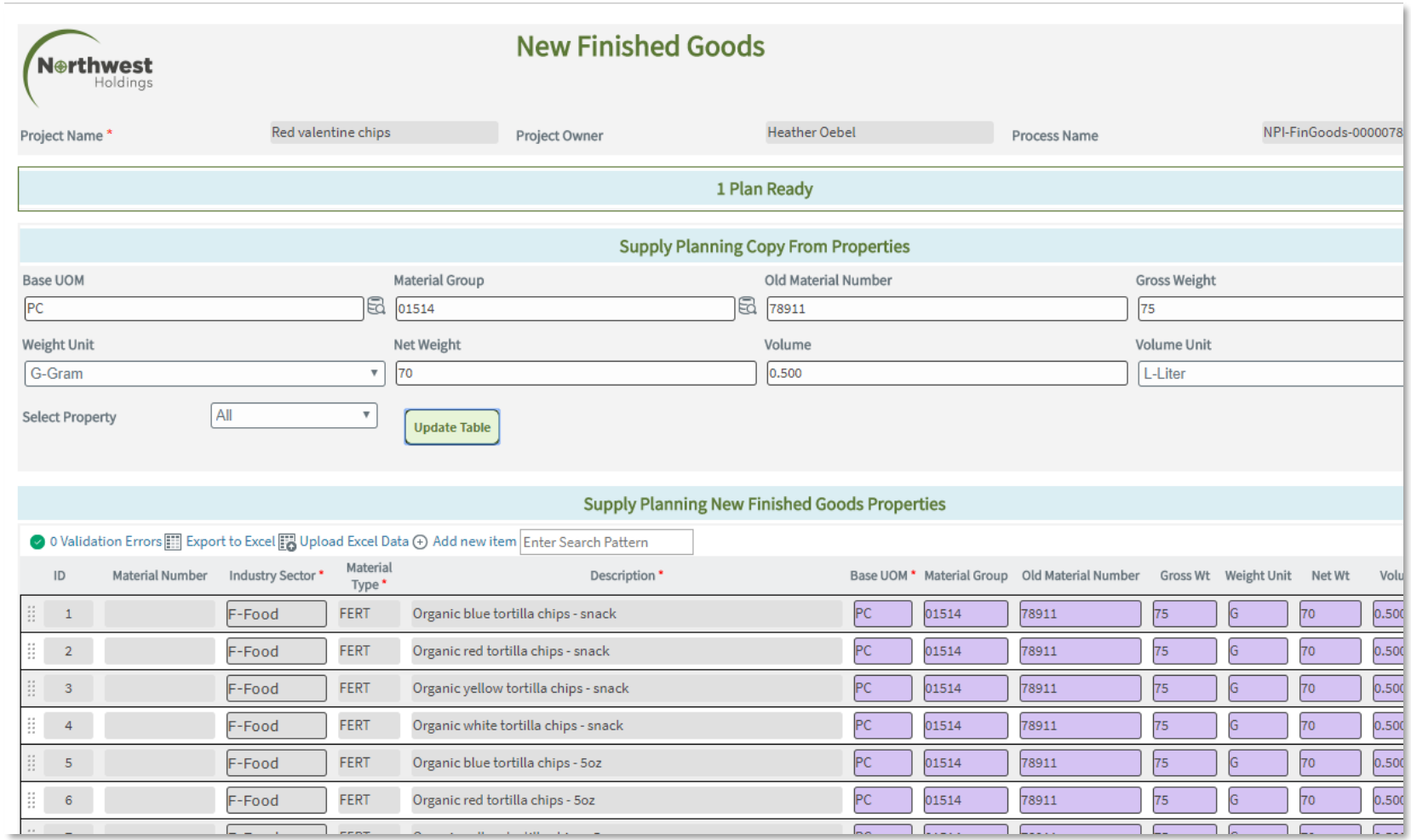
# AI comes in various flavors

| | 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 |

# Master Data Creation

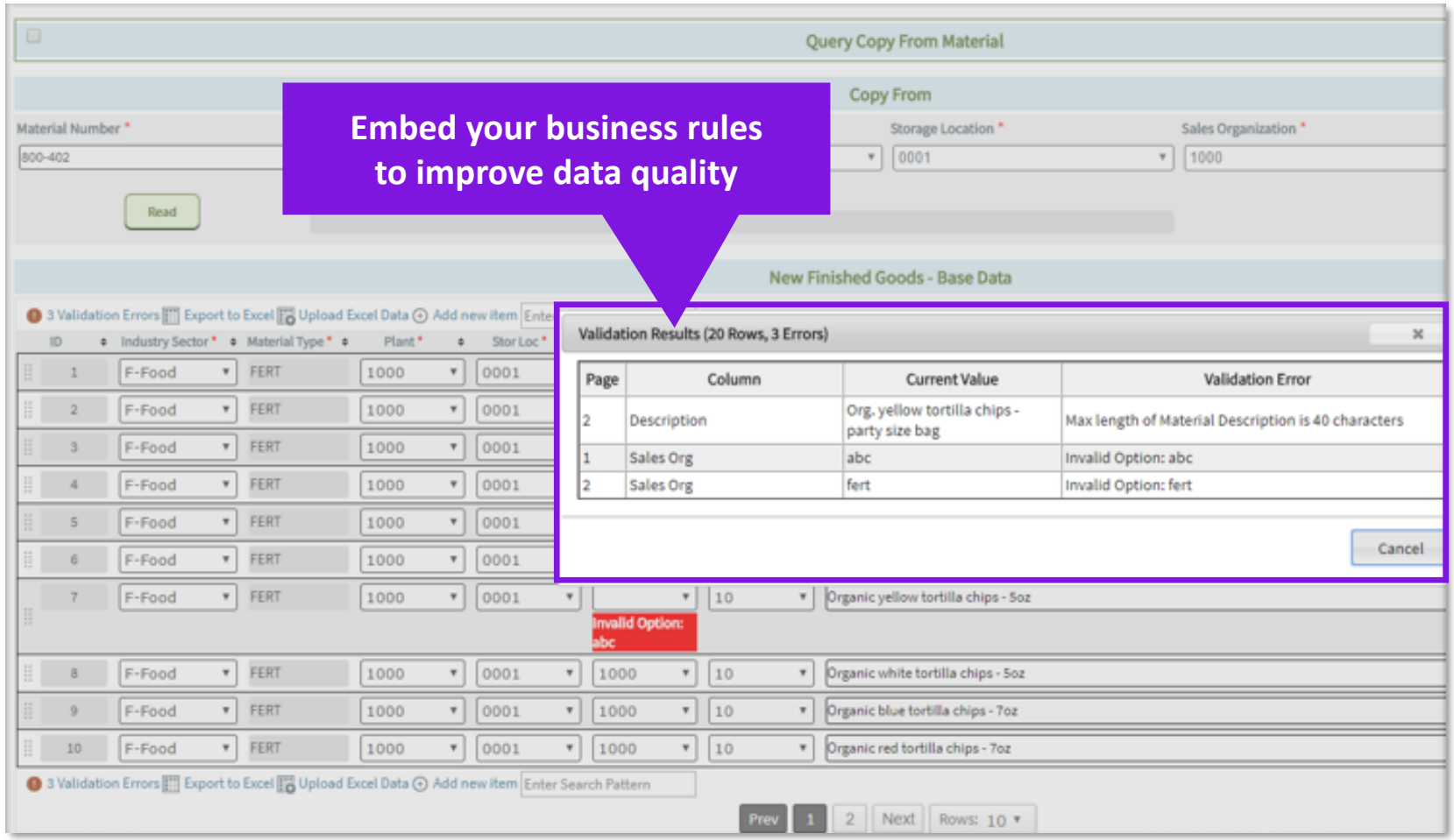
Constant new materials creations and changes

Highly manual, complex process with lots of possible data entry error points



# Master Data Creation

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



# Challenges in establishing business rules

Heavy reliance on SMEs and tacit knowledge

Gaining cross-functional alignment is time consuming

Covering edge cases in a rule is difficult

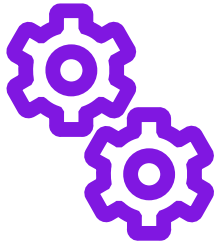
Even rules do not achieve 100% data quality

What if you could eliminate the need for many of these rules by using Machine Learning?

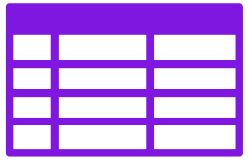
# Master Data Creation with ML

New Account creation request

User enters minimum number of input fields



ML predicts output fields based on delivered input fields



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

# Benefits of Machine Learning

- Improve data entry and decision making through recommendations
- Improve data quality through ML-based checks
- Create rules and predictions that are not possible without ML
- Reduction of hard-coded rules
- Reduce complexity to determine business rules
- Reduce time to value in solution development

# Why Precisely Automate?

# Precisely Automate Platform

## Automate Evolve

WORKFLOW-ENABLED PROCESS AUTOMATION

Automate and streamline SAP processes using workflows

- Advanced form and workflow capabilities
- Advanced data stewardship capabilities via web forms
- Data automaton and management (Excel – SAP)
- Extensive Audit and ROI reporting
- Detailed process analytics
- Process governance
- Centralized management
- Server-side file management and execution
- Attended or unattended automation
- Business-focused, low-code environment

Business users work in Excel or web forms

+

## Automate Studio

STANDALONE DESKTOP

Exchange data with SAP quickly and easily using Excel

- Data creation and maintenance
- Data migration
- Operational reporting
- Data stewardship

Business users work in Excel

# A complete automation platform

## Data Automation

### Excel to SAP

Exchange data with SAP quickly and easily using Excel

+

## Process Automation

### Excel Workflow

Automate and accelerate SAP business processes through Excel file management workflows

### Form & Workflow

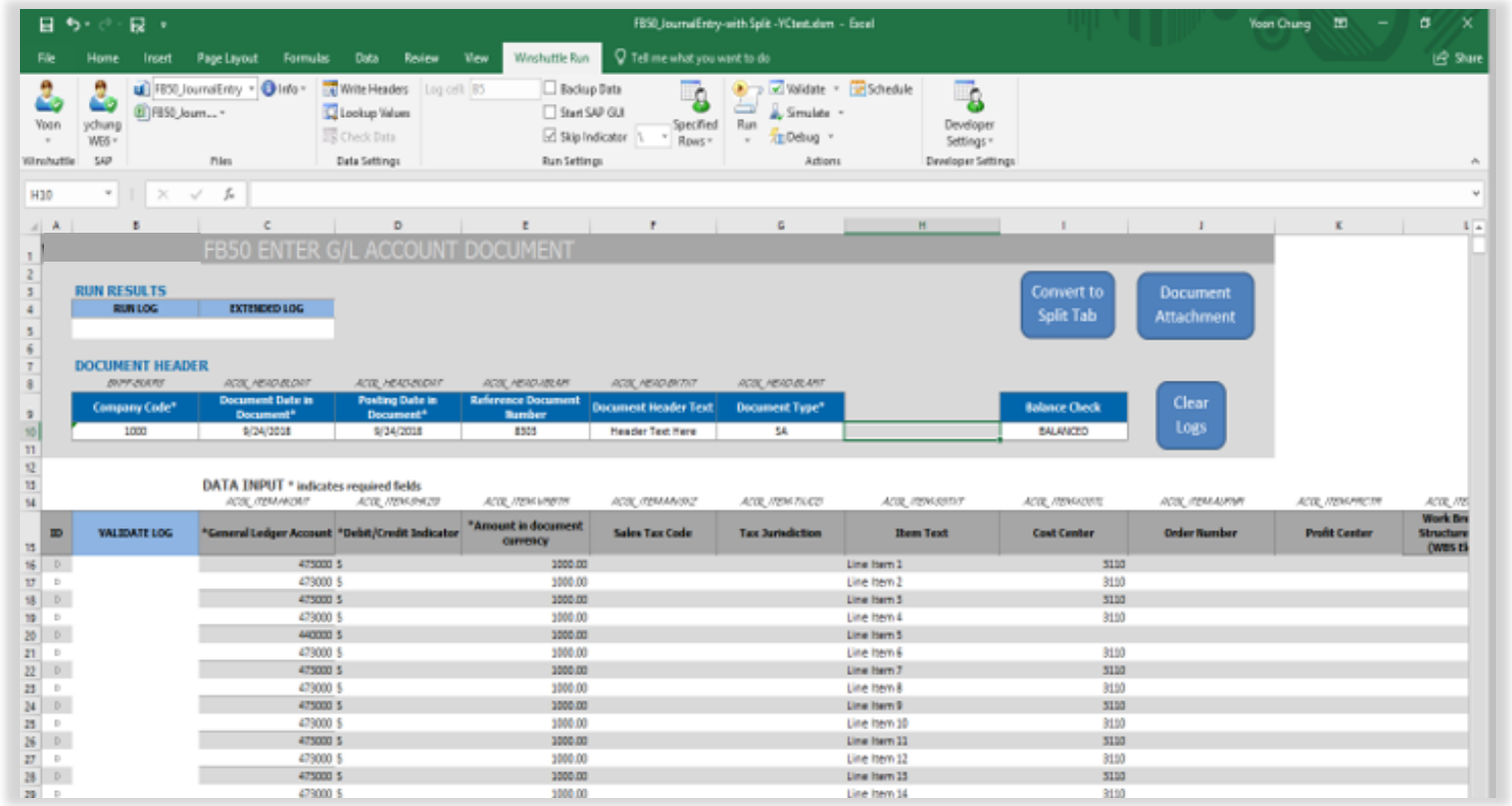
Automate and accelerate SAP business processes with integrated forms and workflows

# Manage SAP data using Excel

Why stop using the finance and accounting tool of choice?

FI-CO processes often:

- Requires specific training
- Finicky manual processes
- Complex multi-screen transactions and processes



# A complete automation platform

## Data Automation

### Mass data management

Exchange data with SOR quickly and easily using Excel

+

## Process Automation

### Excel Workflow

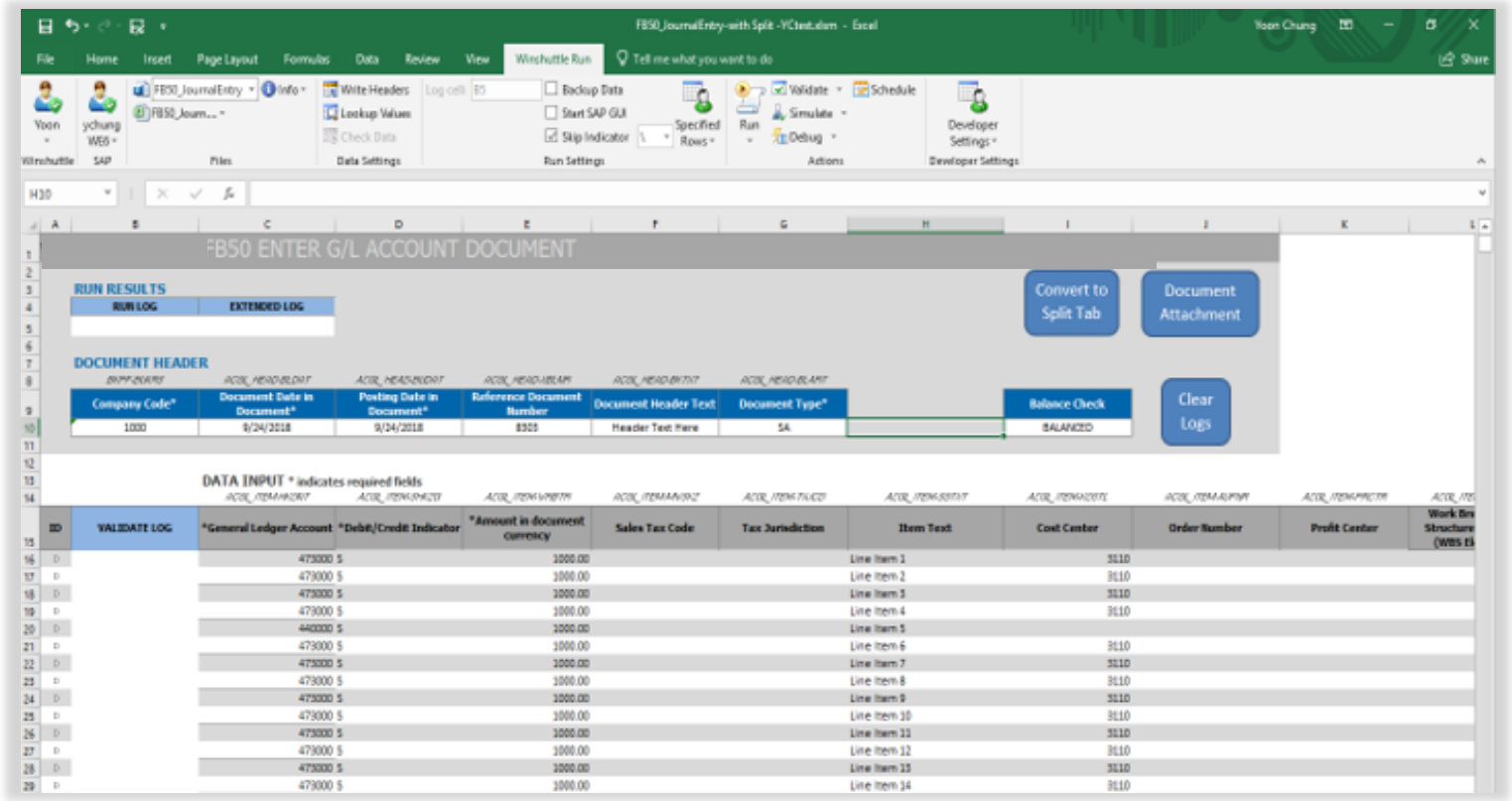
Automate and accelerate business processes through Excel file management workflows

### Form & Workflow

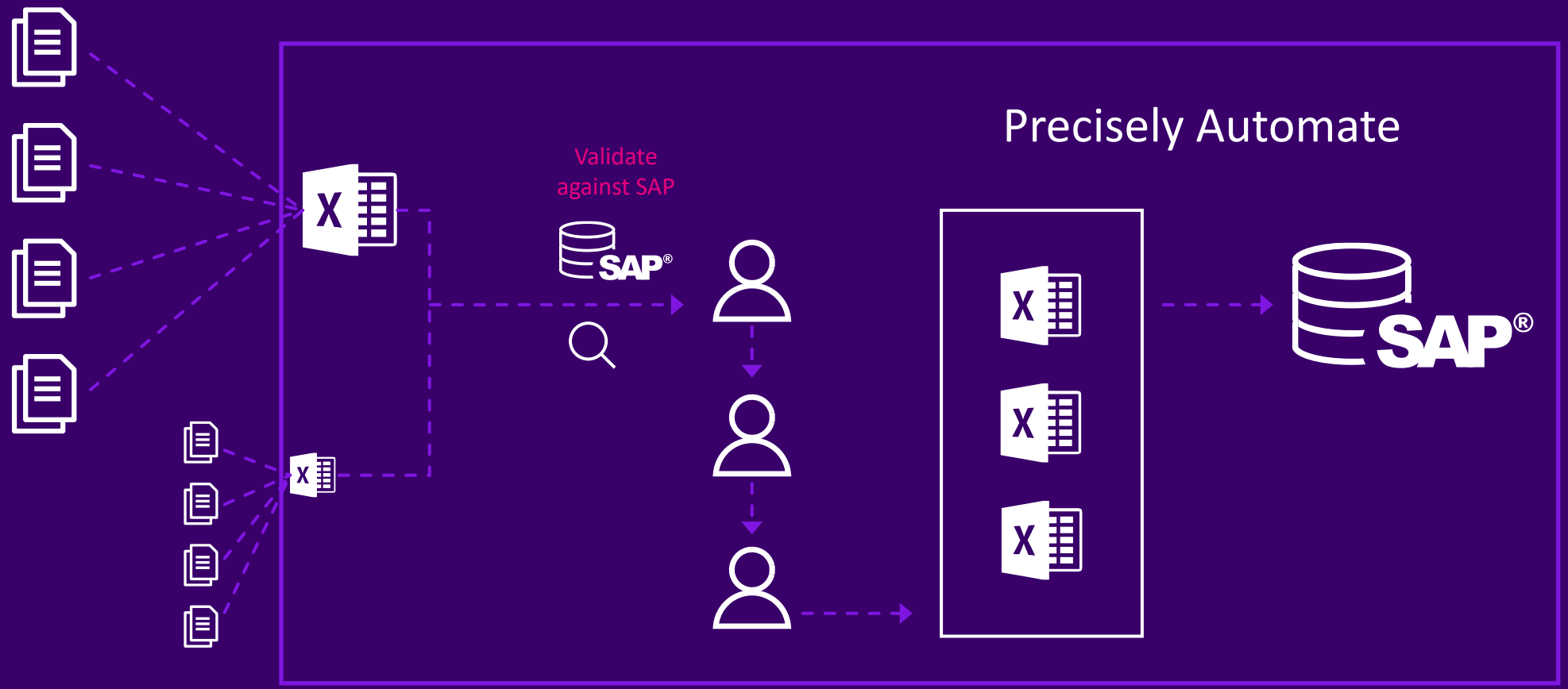
Automate and accelerate business processes with integrated forms and workflows

# Manage journal entries using Excel

Flexible, desktop journal entry automation



# Excel workflow for Journal Entry



# A complete automation platform

## Data Automation

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## Process Automation

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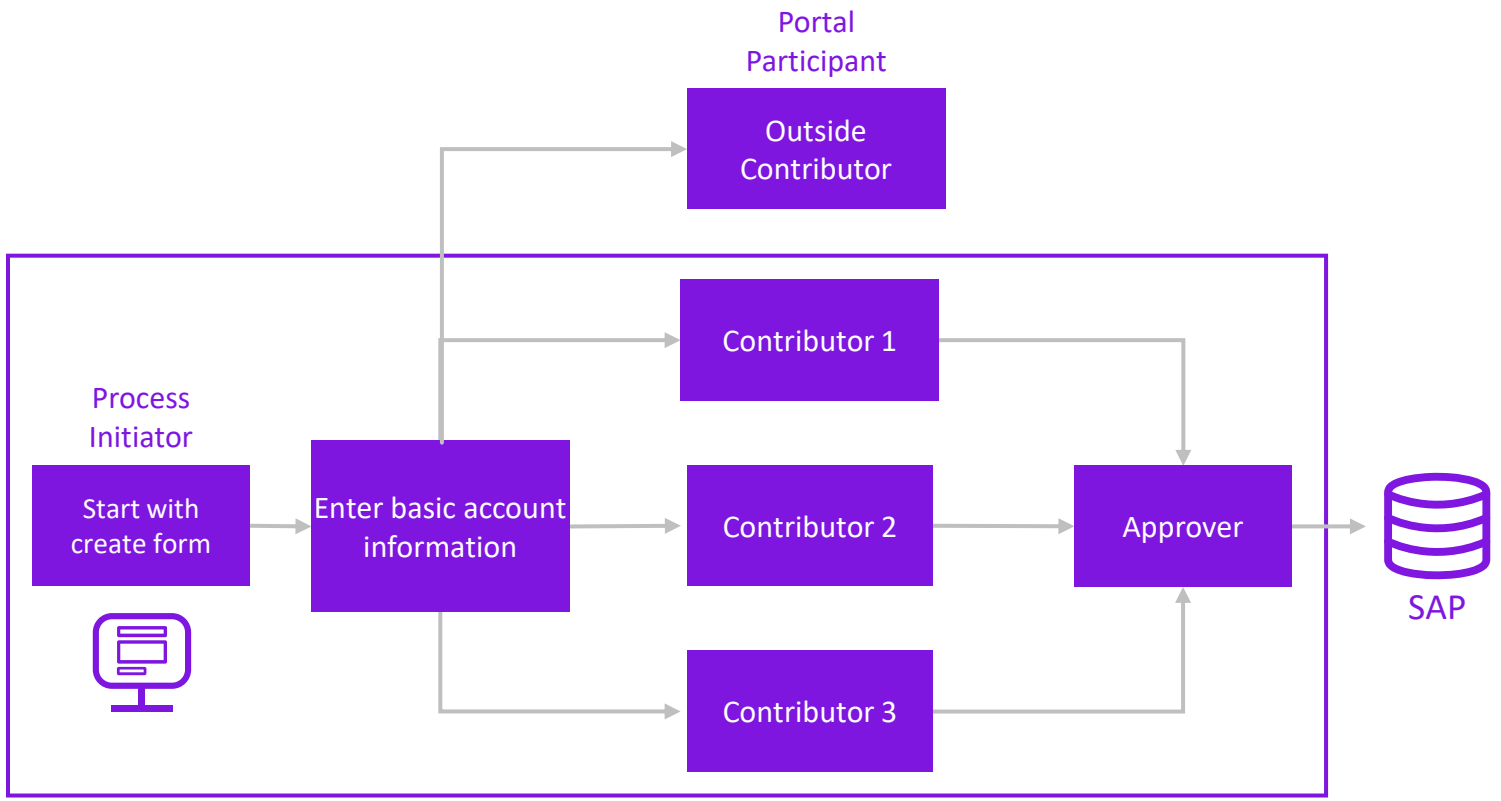
# Form & Workflow

Automate account creation with forms and workflow across multiple contributors




Automate Evolve

# The Automate platform delivers: Hyperautomation

Workflow

Connectivity (APIs)

Self-service

Data Management

Cloud deployment

Governance

Low-code development

Attended & unattended automation

Forms

Data quality

# Empowering business teams to make an impact

# Automate business-critical data processes

and any business process across your SAP landscape

Materials management & product launches

Customer onboarding & maintenance

Vendor onboarding & maintenance

Finance & accounting data and processes

Plant maintenance assets, plans & processes

# Materials

Examples of the Automate Platform delivering customer value delivered through material master and related processes

## 50%-75%

Reduction in time to market

- Agility and speed
- Increases competitive advantage

## 90%

Reduction in cost to process materials changes

- Lower costs
- Maintain current staffing levels
- Faster ROI

## 90%

Time reduction in materials data collection

- Agility and Speed
- Increased competitive advantage

## $1.3 million

Savings in materials management productivity

- Measurable ROI
- Optimize process

# Customer & Vendor

How the Automate Platform is helping SAP enterprises optimize customer and vendor management

## 97%

Reduction in time to create a customer

- Agility and speed
- Increases competitive advantage

## 6 Days

Eliminated from customer create process

- Speed
- Improved employee productivity

## 87%

Reduction in time needed to qualify vendors and materials

- Speed
- Process visibility
- Improved productivity

## 75%

Reduction in SAP data entry time

- Agility and speed
- Improved process efficiency

# Other Use cases

Value delivered through the Automate platform across the SAP landscape

## 9 months

Return on investment in Automate

- Measurable ROI
- Sustainable approach to automation

## 1.4 Million

Pricing records changed with no additional headcount

- Agility
- Improved staff productivity

## Replace paper

with online Evolve forms for processing customer refunds

- Improved customer satisfaction
- Increased process visibility
- Reduced time of refund by up to three weeks

## 20,000

Journal entries processed during 4-day close window

- Speed and improved data quality
- Auditability
- Team continued to work in Excel

# Automate platform: Benefits

Agility

Speed

Improved data quality

Process visibility

Business team focus

Automation flexibility

Scalability

Proven track record

# Make an impact across your business

Financial Accounting

Controlling

Sales and Distribution

Materials Management

Plant Maintenance

Asset Management

Project Systems

Production Planning

Quality Management

Human Resources

# Wrap-up

# Key Takeaways

Hyperautomation success depends on adopting a best-of-breed portfolio approach

- Automation is key to addressing organizational needs and wants for data integrity
- Artificial Intelligence and Machine Learning will drive digital transformation
  - There are different types of AI/ML
- The Precisely Automate platform has the capabilities to be the heart of a successful Hyperautomation strategy
- We have an established track record of delivering automation success for our customers
- Our focus is on complex, data-intensive, master data use cases that are centered on SAP ERP

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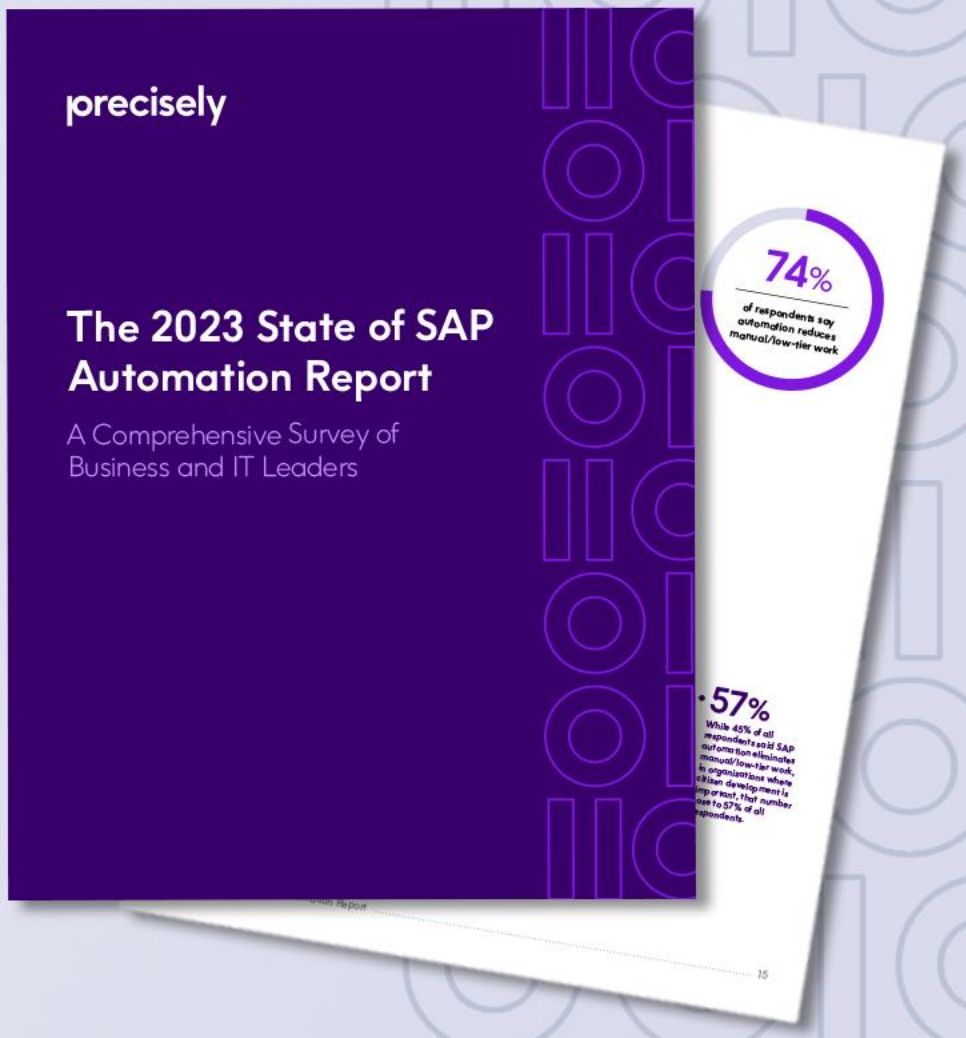
# 2023 State of SAP Automation Report

## A Comprehensive Survey of Business and IT Leaders

precisely.com/AutomationReport2023

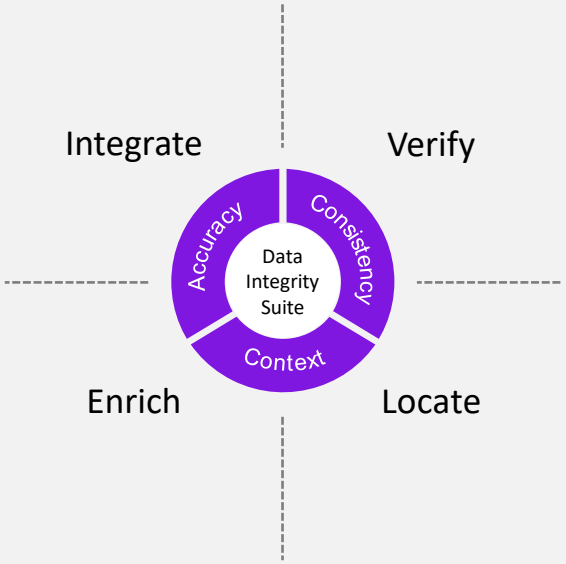


Winshuttle is now part of Precisely, the leader in data integrity

precisely

## The global leader in data integrity software

Our data integrity software, data enrichment products, and strategic services deliver accuracy, consistency, and context to power confident business decisions.




**12,000**
customers

**99**
of the Fortune 100

Customers in more than
**100 countries**

**2,500**
employees

### Brands you trust, trust us

### Data leaders partner with us

# Questions?

Thank you!

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