













## Hyperautomation **Practical Tools, Strong Results**

August 14, 2025

# Business Technology Services

Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, & managed service solutions.

Our end-to-end services can help clients achieve their digital transformation goals & include:

- |  |                                      |   |  |
|--|--------------------------------------|---|--|
|    | Solution Assessment & Selection      |    | Implementation Project Rescues         |
|    | System Implementation & Integration  |    | Business Intelligence (BI) & Analytics |
|    | Process & Technology Design          |    | Robotic Process Automation (RPA)       |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development         |
|  | Training, Monitoring, & Support      |  | IT & Cybersecurity Managed Services    |



# Premier Technology Partnerships



Microsoft Partner



Trimble  
Construction One™





# Ready to Reach Your Potential?



**Director, Insights & Automation**

**Ryan Kauzlick**

Forvis Mazars

Business Technology Services



# Learning Objectives

1. Understand the concept of hyperautomation
2. Explore practical applications of hyperautomation





# 01

*“Change is the law of life. And those who look only to the past or present are certain to miss the future.”*

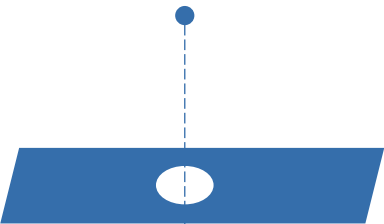
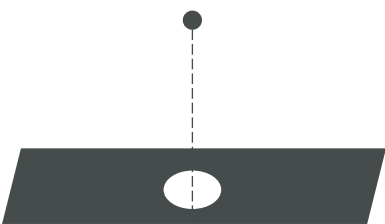
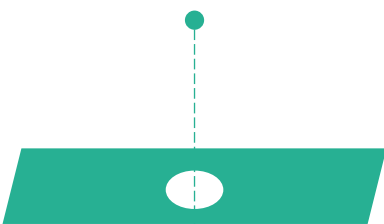
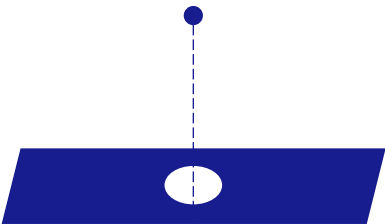
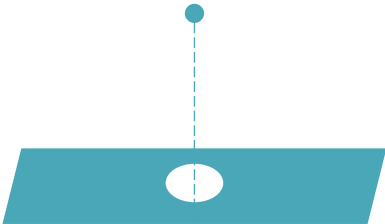
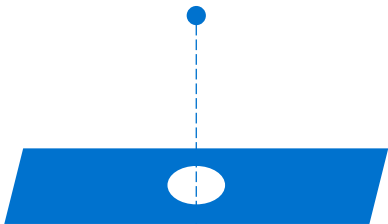
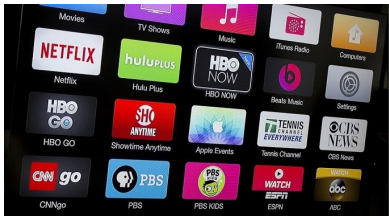
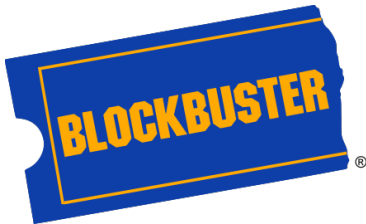
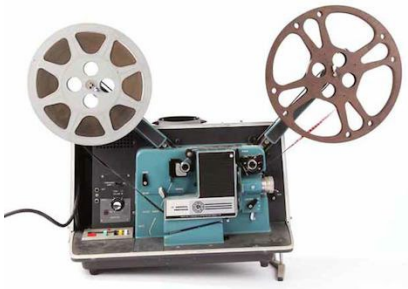
**– John F. Kennedy**





# The Journey

## Who Would Have Thought



1950s

1970s

1980s

1990s

2000s

Today

Reels

VHS/Beta

Laserdisc

Blockbuster  
Peaked

Online  
Streaming

What's  
Next?

# 02

Houston, We've Got a Problem

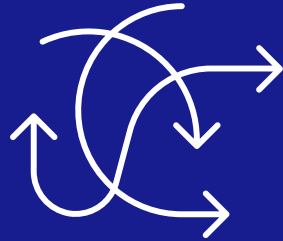




# Headwinds Facing Organizations

## Is Automation Right for You?

### Inefficient Processes

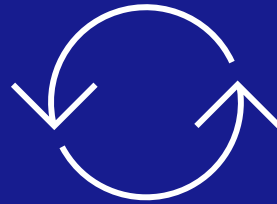


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On average, companies lose **20–30%** of revenue each year due to inefficient processes <sup>1</sup>

<sup>1</sup> [How Inefficient Processes Are Hurting Your Company](#)

### Opportunity for Automation

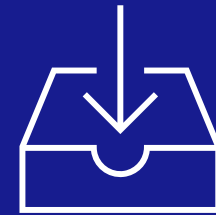


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On average, workers spend **520 hours** annually on tasks that could be automated <sup>2</sup>

<sup>2</sup> [How Repetitive Tasks are Hurting Your Business](#)

### Work Overload



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On average, **68%** of workers suffer from work overload in which they have too much to handle daily <sup>3</sup>

<sup>3</sup> [Key Business Automation Statistics You Should Know](#)

# Workplace Automation

## The Cost of Doing Business

Is your company prepared?

### Average Tenure

**3.9 yrs**

Industry agnostic

### Employee Satisfaction

**90%**

Feel more satisfied with their jobs  
when using technology

### Cost of Replacement

**33%**

New employees quit after about  
six months

### Opportunity Costs

**54%**

Believe they could save more  
than five hours a week from  
automation



[19 Employee Retention Statistics That Will Surprise You 2024](#)

[A monday.com report: the state of workplace automation](#)

[How Automation Drives Business Growth and Efficiency \(hbr.org\)](#)

[Employee Tenure in 2024 - U.S. Bureau of Labor Statistics](#)

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**forv/s**  
**mazars**



# 03

## Opportunity

*“When you walk up to opportunity’s door ... don’t knock it. Kick that ---- in, smile and introduce yourself.”*

– Dwayne “The Rock” Johnson



# What If ...

## Opportunity Cost

What if there were a way to take advantage of automating various tasks?

### Parameters

Assumption	Value
Est. Hours Worked per Day	8
Est. # Days per Week Worked	5
# Hours per Year	2080
# Corporate Holidays per Year	10
# of PTO Days per Year	15
Est. Hours of Work Performed	1880
Est. Days Worked per Year	235
Est. Weeks Worked per Year	47
Est. Burden Rate	30%

\* Shaded rows are calculated values

### Input Invoices

- **Frequency:** Daily
- **# Inputted Each Day:** 40
- **# Mins/Occurrence:** 2
- **Est. Labor Cost/Hr:** \$39.72
- **Est. Employees:** 1
- **Est. Yearly Cost:** \$12,445

### Performing Tenant Check

- **Frequency:** Daily
- **# Performed Each Day:** 20
- **# Mins/Occurrence:** 10
- **Est. Labor Cost/Hr:** \$20.88
- **Est. Employees:** 1
- **Est. Yearly Cost:** \$16,356

### Reallocate Costs

- **Est. Time Save/Occurrence:** 4
- **Est. Days Saved/Year:** 62
- **Est. \$ to Reallocate:** \$6,542.40

# Tailwinds Automation Can Address

## Find High-Volume Tasks That Yield Low-Value Results



**248%**

Return on investment  
over three years\*

**27.4%**

Reduction in errors  
on average\*

**60%**

Of all occupations have about  
30% of activities that can be  
automated\*\*

\*Source: The Total Economic Impact® of Microsoft Power Automate – July 2024.

\*\*Source: A Future That Works: Automation, Employment, and Productivity – McKinsey .



Is There True Value?

What do these numbers have in common?

187 %

260 Hrs.

96 %

205 %

391 %

520 Hrs.

\$5 m

128 %

\$225 k

# Define

## What Is Hyperautomation?



### According to Gartner ...

Hyperautomation is a business-driven, disciplined approach that organizations use to **rapidly identify, vet, and automate as many business and IT processes** as possible.

Hyperautomation involves the orchestrated use of multiple technologies, tools, or platforms, including artificial intelligence (AI), machine learning, event-driven software architecture, robotic process automation (RPA), business process management (BPM), intelligent business process management suites (iBPMS), integration platform as a service (iPaaS), low-code/no-code tools, packaged software, and other types of decision, process, and task automation tools.

You Have a Toolbox

Use the Right Tool for the Job

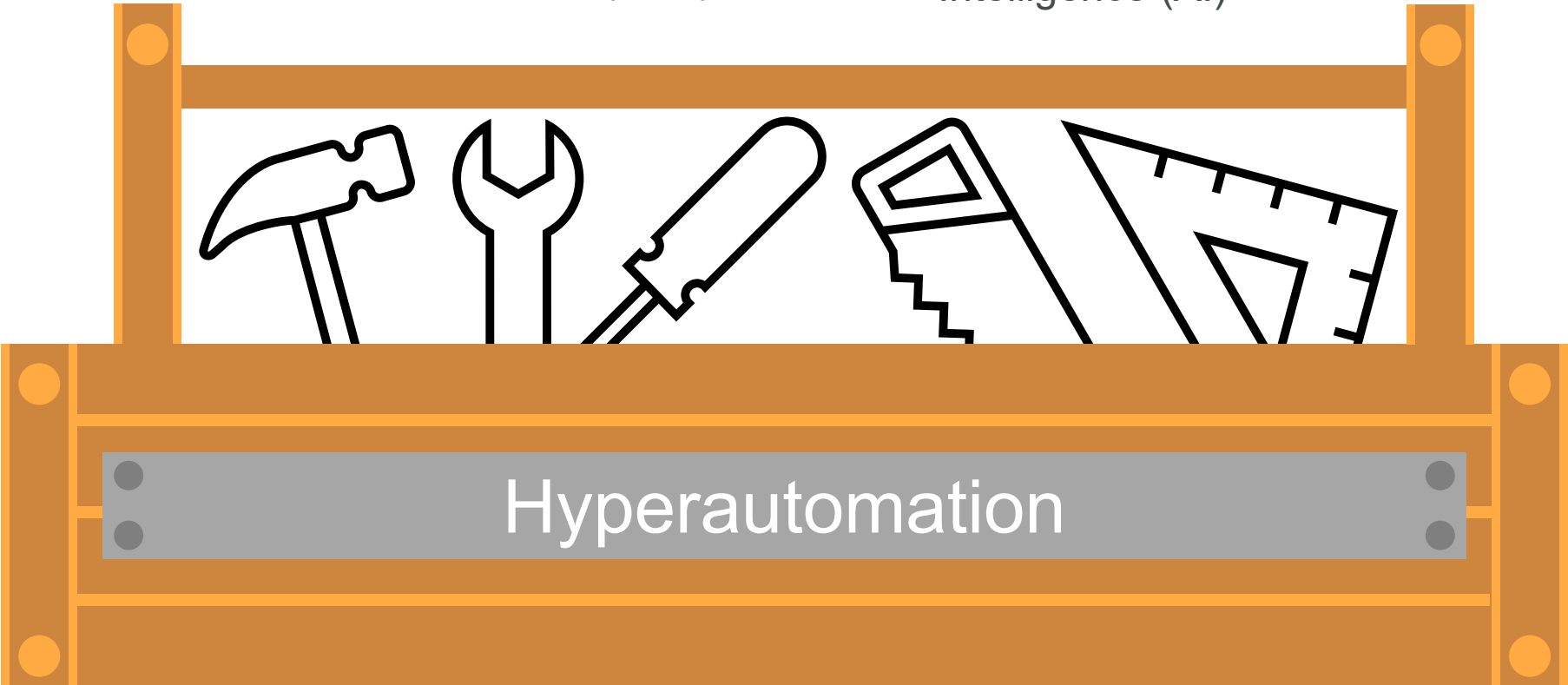
Low Code/  
No Code

Robotic Process  
Automation (RPA)

Machine  
Learning (ML)

Digital Process  
Automation (DPA)

Artificial  
Intelligence (AI)





# 04

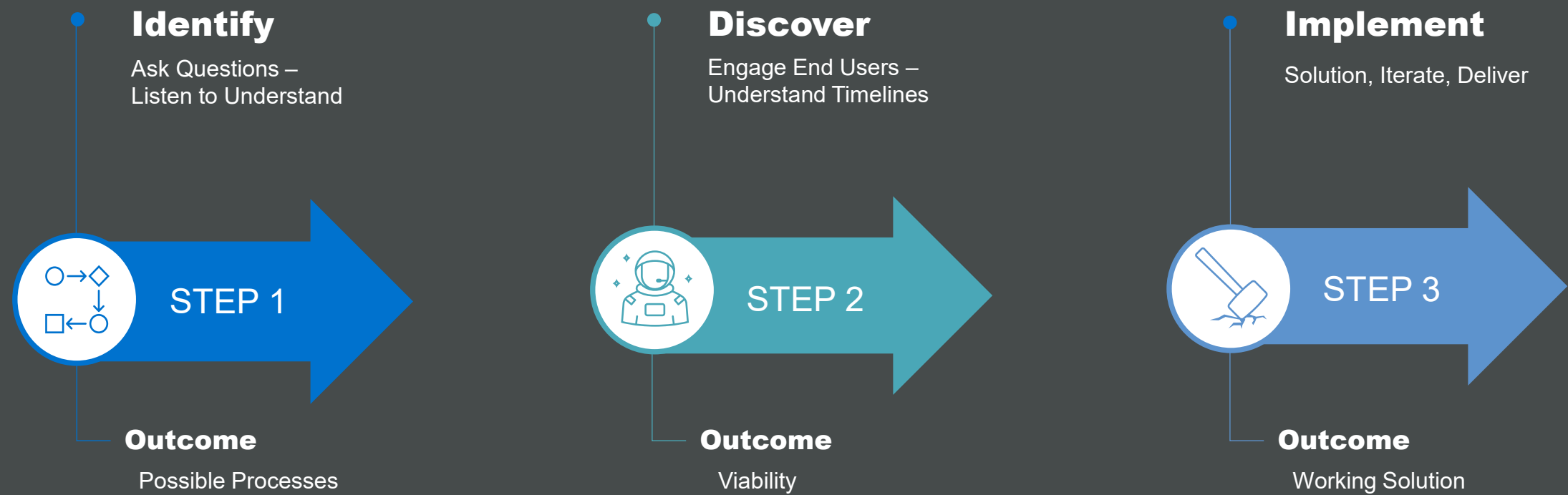
Where to Start



# Hyperautomation

## The Process

Every successful automation goes through a defined process.



# Discover

## Determine Automation Viability



Automating process should provide a positive return on investment (ROI). Here are key questions to consider.

**01**

### Calculating Value

Have you identified how this automation provides value to the business?

**02**

### Champion Exist

Have you identified a Champion of this automation to see it through completion?

**03**

### Reoccurring

Are additional reoccurring costs associated with the automation?

**04**

### Level of Effort

What is the estimated LOE to take from concept to deployment?

**05**

### Timeline

Is the timeline realistic to achieve the goals of the automation?

**06**

### Reuse

Will this automation be for a one-time use or repeatable?



# Unlocking the Value of Automation

## How do you measure value?

Quantifying the Success of Automation

01



Cost Savings

02



Hours Saved

03



Employee Input

04



Adoption

# 05


## Comprehensive Platforms




# Microsoft Power Platform

## A Comprehensive Automation Platform


Powered by Low-Code & AI Applications



**Power Apps**  
Application development



**Power Automate**  
Process automation



**CoPilot Studio**  
Intelligent bots



**Power Pages**  
Business websites



**Power BI**  
Business analytics





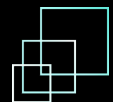
One platform to innovate at scale



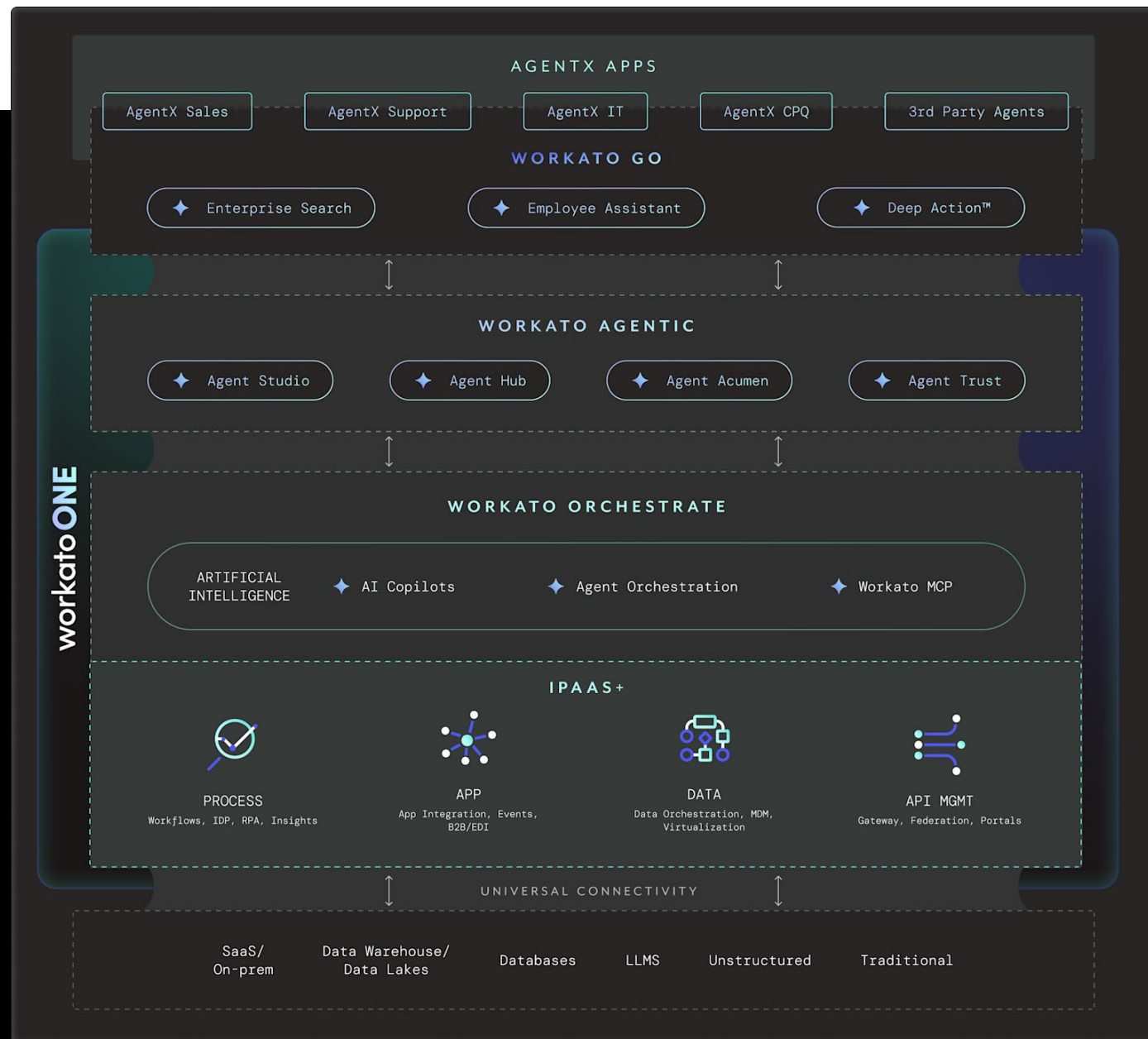
**Embrace versatility,  
tame complexity**



**Democratize  
transformation**



**Scale your  
success with AI**



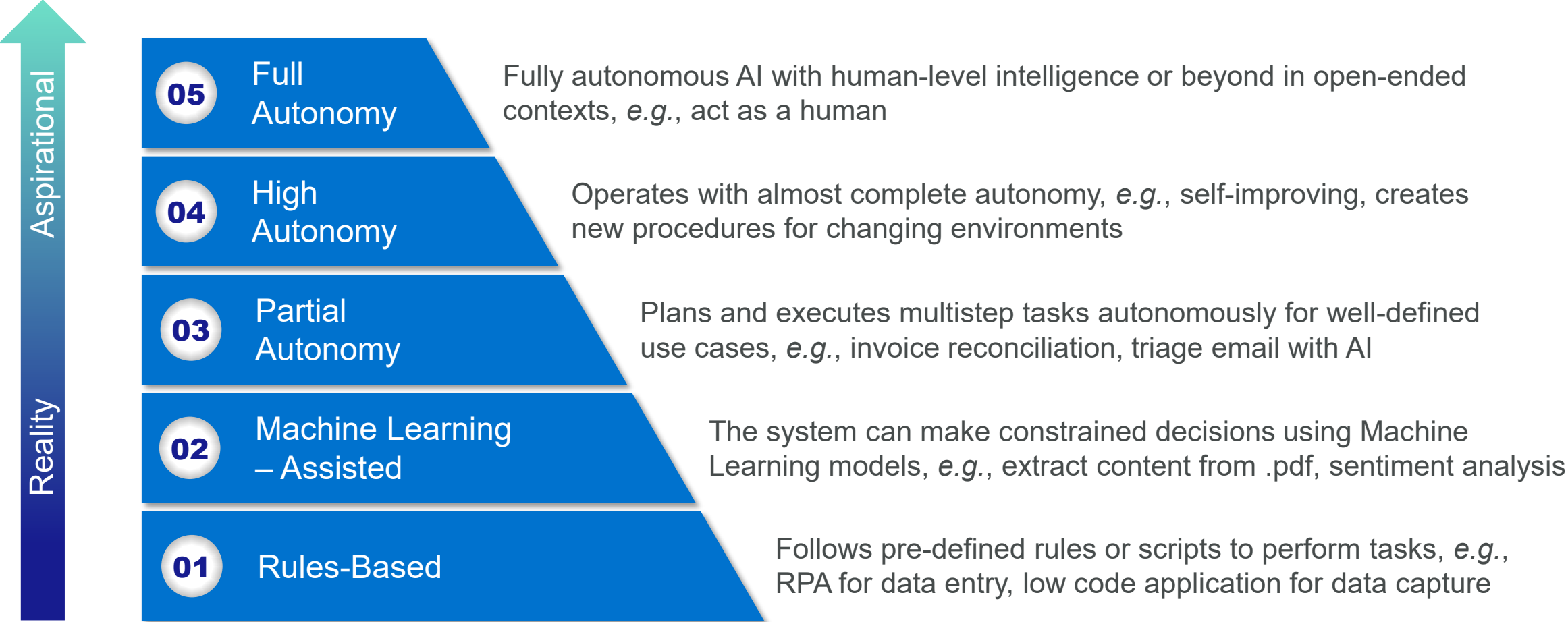
# 06

## Practical Use Cases



# Agentic AI

## Levels of Autonomy



**NOTE:** Level 4 & Level 5 are aspirational in today's world but getting closer to reality

# Sample Use Case

## Write Invoice Data to System

### Utilizing Robotic Process Automation (RPA)

#### • Assumptions

- Team has invoices that are in .pdf format. The team needs to enter this information into their ERP system in an automated manner. Lastly, the data needs to be recorded in an Excel spreadsheet for reconciliation purposes

#### • Setup

- Utilize Microsoft Power Automate Desktop
- Utilize Microsoft Excel

#### • Output

- Data extracted from the invoice is entered into the ERP system and captured in an Excel document for reconciliation purposes

The composite image illustrates the RPA process for writing invoice data to a system. It includes three main components:

### INVOICE

**DATE** 7/1/2024 **INVOICE NO** 000123 **ACME CORPORATION**  
 234 France Ave.  
 WA 76328  
 www.adatum.com  
 sales@acme.com

**INVOICE TO**  
 Fabrikam, Inc.  
 345 North St  
 NY 98052

Customer Id: 5791

SALESPERSON	PAYMENT TERMS
Jacob Steffensen	Due on Receipt

QUANTITY	DESCRIPTION	UNIT PRICE	LINE
05	Pool filter cartridge	\$9.96	\$49.80
01	Pool filter housing	\$12.00	\$12.00
01	Pool filter pump	\$85.00	\$85.00

### Power Automate Desktop Flowchart

- 1 > Region Initialize (6 Actions)
- 8 End region
- 9 For each CurrentFile in PDFFiles (7 Actions)
- 10 > Region Extract Data From Invoices (7 Actions)
- 18 End region
- 19 > Region Enter into ERP (8 Actions)
- 28 End region
- 29 > Region Reconciliation (3 Actions)
- 33 End region
- 34 End
- 35 > Region Clean-up (2 Actions)
- 38 End region

### ERP System Interface

Contoso Invoicing

ID	Date	Account Name	Contact Email	Amount	Status
1044	5/26/2024	Johnson Corporation	sales@johnson.com	\$ 33.50	Invoiced
1045	6/1/2024	ACME CORPORATION	sales@acme.com	\$ 150.25	Invoiced
1046	7/24/2024	Johnson Corporation	sales@johnson.com	\$ 53.00	Invoiced
1047	7/1/2024	ACME CORPORATION	sales@acme.com	\$ 154.25	Invoiced
1048	7/2/2024	New Plumbing	sales@newplumbing.com	\$ 52.00	Invoiced
1049	7/15/2024	Johnson Corporation	sales@johnson.com	\$ 50.20	Invoiced
1050	7/1/2024	ACME CORPORATION	sales@acme.com	\$ 150.25	Invoiced
1051	7/26/2024	Johnson Corporation	sales@johnson.com	\$ 90.20	Invoiced

Invoice Detail | Notes | Budgeting | Sales | Resources

**ID:** 1051

**Date:** 7/26/2024

**Account:** Johnson Corporation

**Contact:** sales@johnson.com

**Amount:** \$90.20

**Status:** Invoiced



Subflows Main

1 **Region Initialize**

2 {x} **Set variable**  
Assign to variable **ProjectPath** the value 'C:\RPA'

3 **Set variable**  
{x} Assign to variable **ContosoPath** the value 'C:\Program Files (x86)\Contoso, Inc\Contoso Invoicing\LegacyInvoicingApp.exe'

4 **Launch Excel**  
Launch Excel and open document **ProjectPath** \Output\Reconciliation.xlsx' using an existing Excel process and store it into Excel instance **ExcelInstance**

5 **Run application**  
Run application **ContosoPath** with arguments and store its process ID into **AppProcessId**

6 **Get files in folder**  
Retrieve the files in folder **ProjectPath** \Input' that match '\*.pdf' and store them into **PDFFiles**

7 **Create new data table**  
Create a new data table and store it into **Regex**

8 **End region**

9 **For each** **CurrentFile** in **PDFFiles**

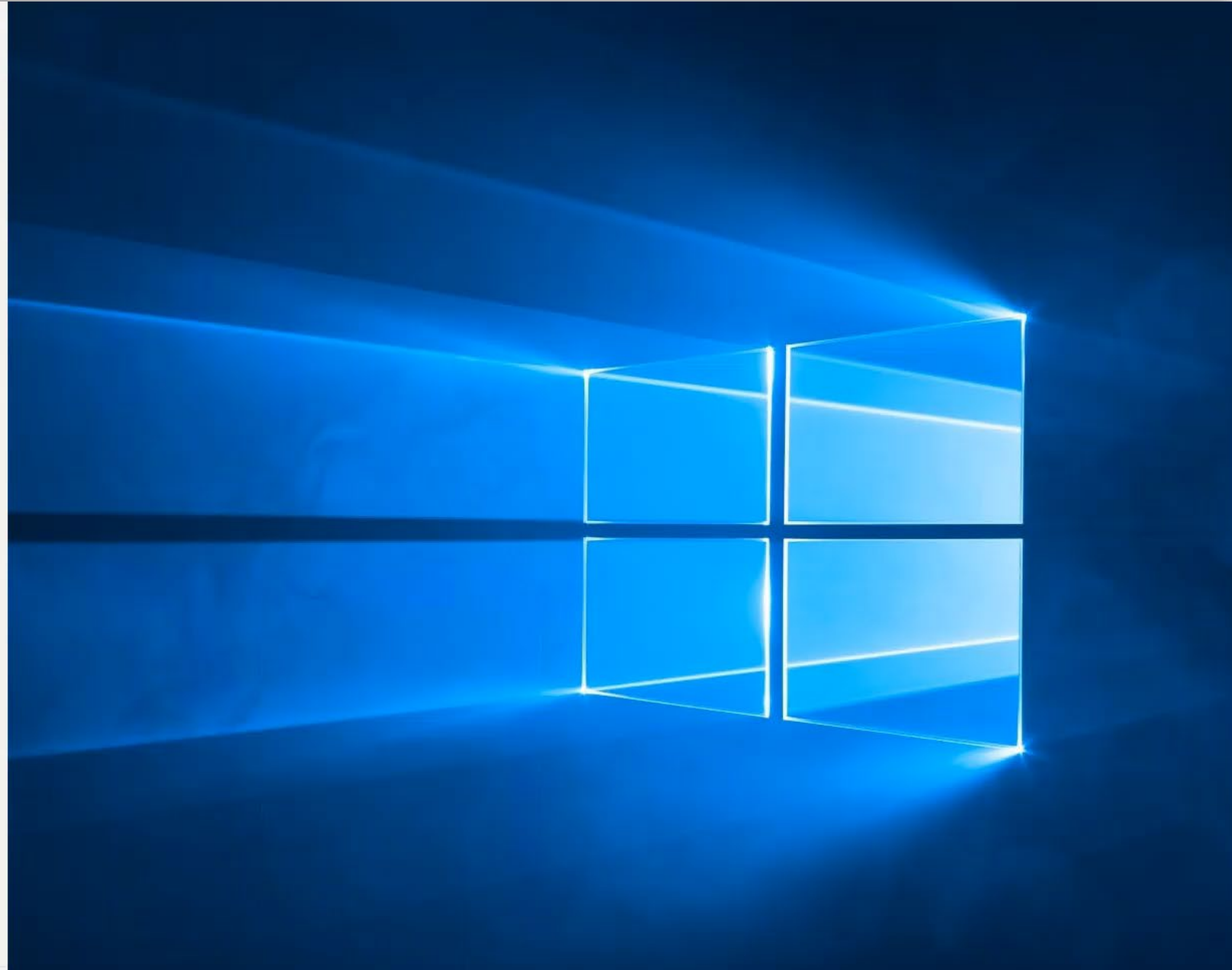
10 **Region Extract Invoices**

11 **Extract text from PDF**  
Extract text from PDF **CurrentFile** into **ExtractedPDFText**

12 {x} **Set variable**  
Assign to variable **RowNumber** the value 0

13 **For each** **CurrentItem** in **Regex**

14 **Parse text**  
Parse text **ExtractedPDFText** for regular expression **Regex** [ **RowNumber** ][Pattern]' starting at position 0 and find the first occurrence only. Store the match found into



# Sample Use Case

## Purchase Request Submission

### Utilizing Power Platform

- **Assumptions**

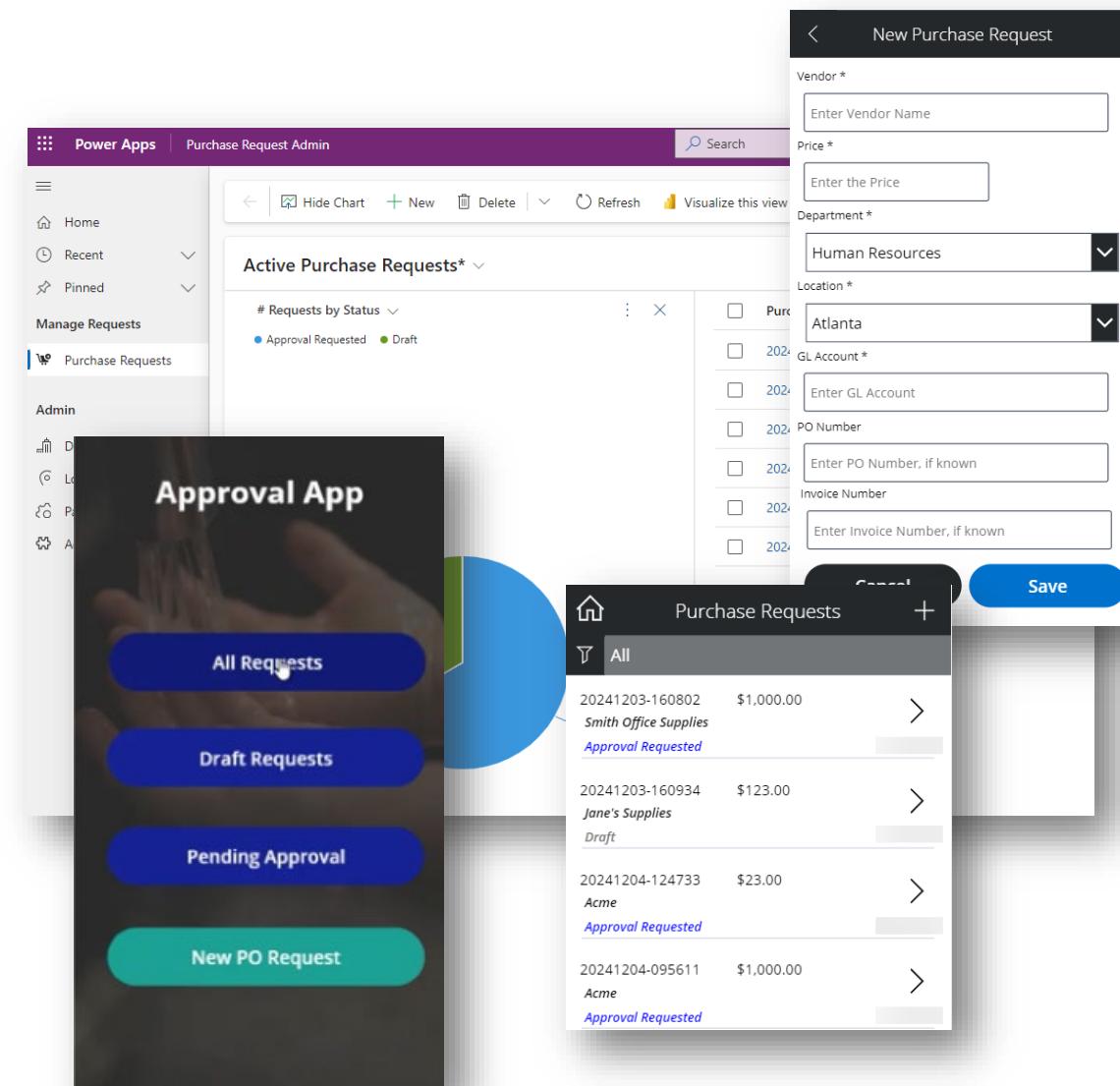
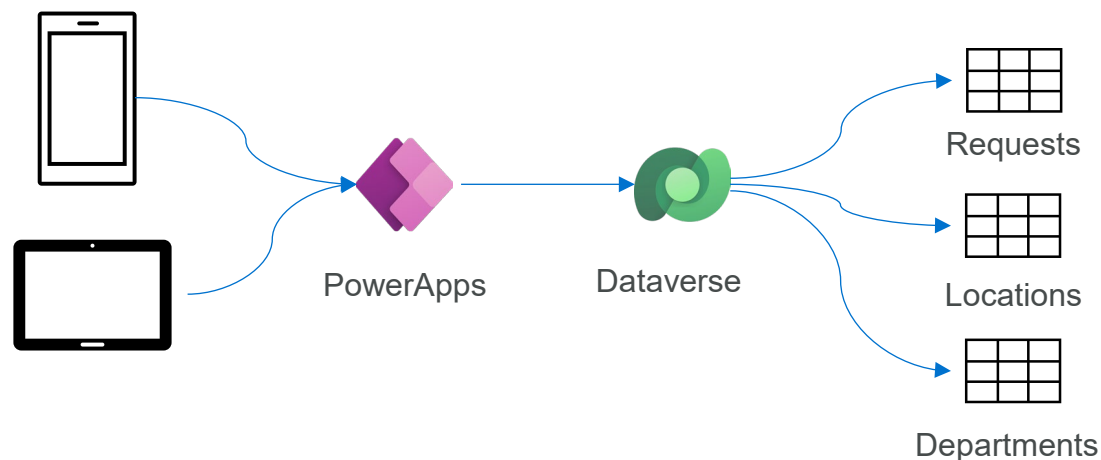
- Team needs to capture information from a mobile platform

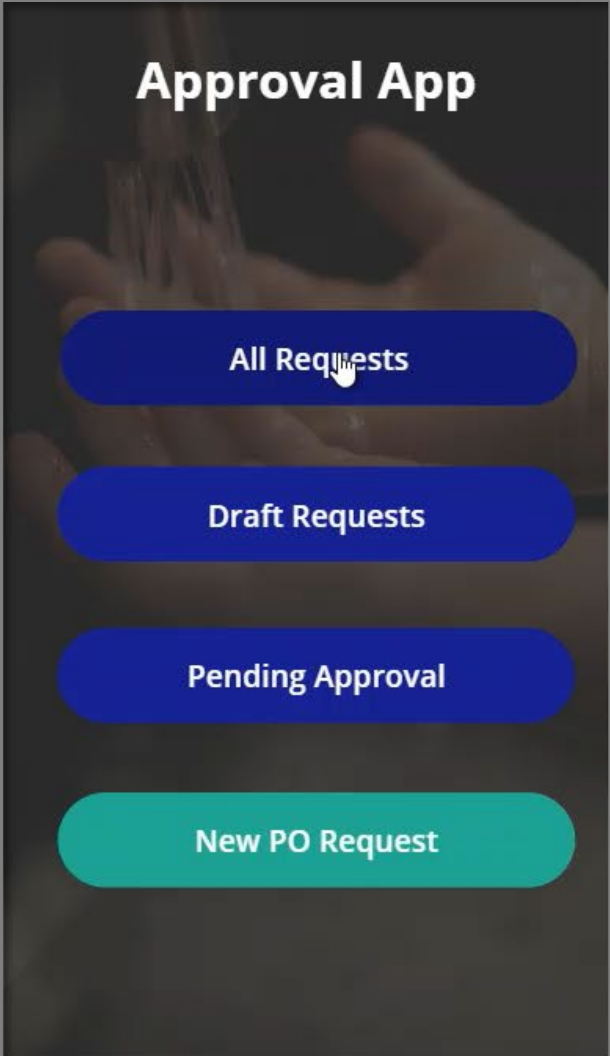
- **Setup**

- Utilize Microsoft Power Apps
- Utilize Microsoft Dataverse
- Built using Microsoft Copilot for Power Platform

- **Output**

- Data written to Dataverse tables





←

Show Chart

+ New

Delete

▼

Refresh

Visualize this view

Email a Link

▼

Share

Active Purchase Requests\* ▼

Edit columns

Edit filters

Filter by keyword

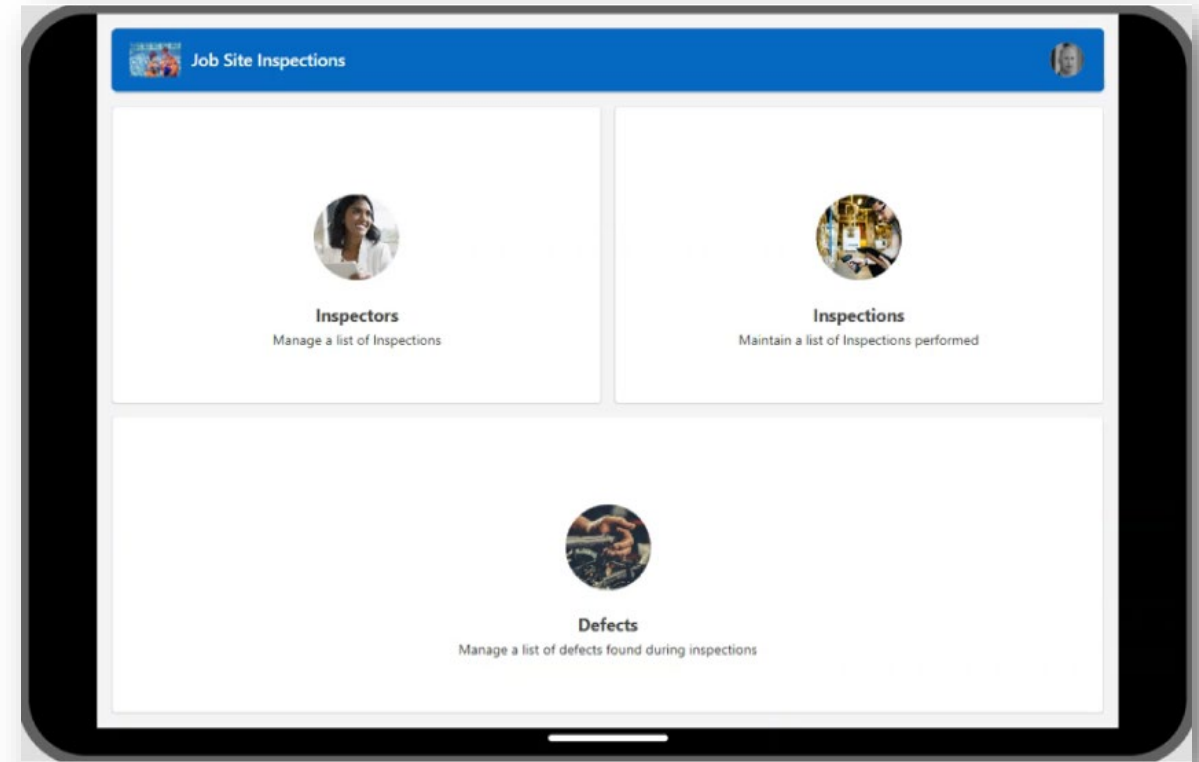
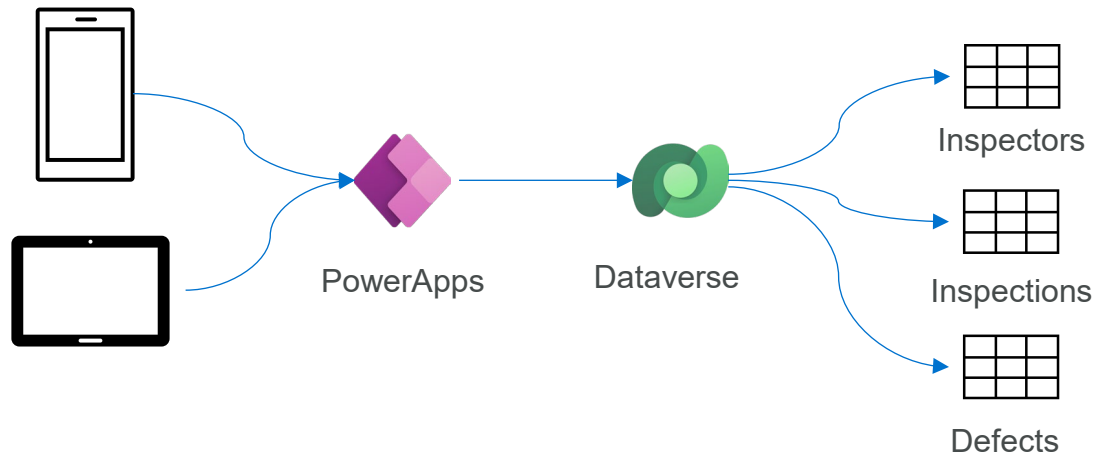
<input type="checkbox"/>	Purchase Request ↑ ▼	RequestStatus ▼	Vendor ▼	GL ▼	Location ▼	Depart
<input type="checkbox"/>	20241203-160802	Approval Requested	Smith Office Supplies	10000	Indianapolis	IT
<input type="checkbox"/>	20241203-160934	Draft	Jane's Supplies	123	Atlanta	Human

Rows: 2

# Sample Use Case Site Inspection

## Utilizing Power Platform

- **Assumptions**
  - Team needs to capture information from a mobile platform
- **Setup**
  - Utilize Microsoft Power Apps
  - Utilize Microsoft Dataverse
  - Built using Microsoft Copilot for Power Platform
- **Output**
  - Data written to Dataverse tables







### Inspectors

Manage a list of Inspections



### Inspections

Maintain a list of Inspections performed



### Defects

Manage a list of defects found during inspections

# Sample Use Case Construction Lien Wavier

## Utilizing Power Platform

### • Assumptions

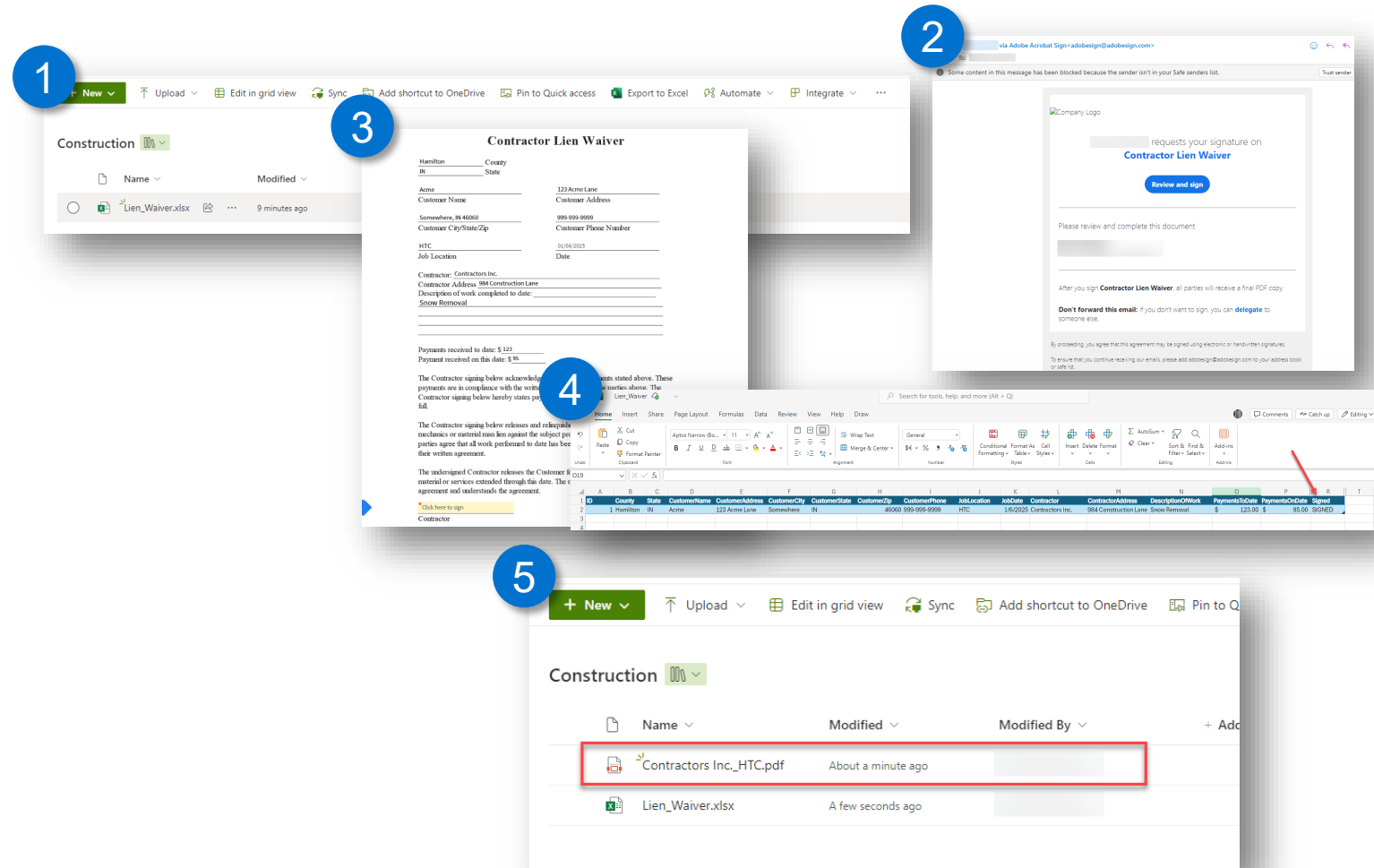
- Team needs to capture signatures for lien wavier

### • Setup

- Utilize Microsoft Power Automate
- Utilize Adobe Sign w/ Template
- Utilize Microsoft Excel

### • Output

- Automated Signed Documents
- Status tracking of document in Excel Spreadsheet
- Signed document stored in SharePoint



1

Upload  
Spreadsheet

2

Adobe Signature  
Requested

3

Reviewer Notified  
and Signs Waiver

4

Spreadsheet  
Updated with  
Status

5

Signed  
Document Created  
in SharePoint

Construction

	Name	Modified	Modified By	
	<div><div></div><div>Lien_Waiver.xlsx</div><div></div></div>	9 minutes ago		

# Sample Use Case

## Create Sales Lead in Salesforce

### Utilizing Workato

#### • Assumptions

- Need the ability to create leads in Salesforce without direct access to Salesforce

#### • Setup

- Utilize Workato
- Utilize Google Sheets
- Utilize Salesforce

#### • Output

- Upon entering a lead in the Google Sheet, a new lead is created in Salesforce

The image displays a Workato automation workflow on the left and a Salesforce Leads dashboard on the right.

**Workato Workflow:**

- TRIGGER:** 1. New row in a sheet in Google Sheets (Real-time)
- ACTIONS:**
  - 2. **MONITOR** the following actions for error
  - 3. Create Lead in Salesforce
  - 4. Update a row in a sheet in Google Sheets
- ERROR FOUND?:**
  - Yes: DO NOT RETRY
  - No: Send email via Workato

**Salesforce Leads Dashboard:**

Leads: My Leads

Total Leads	No Activity	Idle	No Upcoming	Overdue	Due Today	Upcoming
11	11	0	0	0	0	0

11 items • Filtered by Created Date, Me, Total Leads

Name	Title	Company
Jane Doe		System Core
Rina Okafor		ApexLogic Systems
John Doe		Acme Systems
John Smith	Looking to autom...	Core Solutions
John Frank	Looking to autom...	System Consulting
Bobby Lane	Automations	Consulting 987
Lisa Jones	Automations	Acme Consulting

**Google Sheet Data:**

Company	FirstName	LastName	Email	Description	Sync DateTime
xora Systems	Jamie	Lin	jamie.lin@nexora.io	Director of Solutions Architecture exploring automation frameworks for mid-market ERP clients.	2025-07-24T08:13:06.319-07:00
VoltEdge Integrations	Marcus	DeWitt	marcus.dewitt@volteedge.co	VP of Delivery looking to outsource low-code integration work for rapid deployments.	
SynerTech Partners	Priya	Nanduri	priya.nanduri@synerstech.ne	CTO seeking a white-label partner for Dynamics 365 implementations.	
CoreAxis Solutions	Ethan	Morales	ethan.morales@coreaxis.co	Senior Consultant evaluating middleware options for multi-cloud clients.	
BlueGrid Consulting	Aisha	Bennett	aisha.bennett@bluegrid.co	Managing Partner interested in co-selling integration accelerators for healthcare clients.	
IntegraNova	Daniel	Cho	daniel.cho@integranova.co	Head of Innovation scouting partners for AI-enhanced system orchestration.	
FusionLayer Group	Natalia	Petrov	natalia.petrov@fusionlayer.i	Technical Program Manager looking to streamline onboarding workflows via APIs.	2025-07-24T08:43:22.665-07:00
QuantumBridge Tech	Leo	Alvarez	leo.alvarez@quantumbridge	Director of Engineering exploring subcontracting for legacy system modernization.	2025-07-24T08:44:01.560-07:00
ApexLogic Systems	Rina	Okafor	rina.okafor@apexlogic.com		2025-07-24T08:46:00.779-07:00
Acme Systems	John	Doe	john.doe@acme.com	Wants to automate systems using Workato	2025-07-24T08:47:05.037-07:00
System Core	Jane	Doe	janedoe@acme.com	Wants to automate systems using Workato	2025-07-24T08:47:40.529-07:00
Core Solutions	John	Smith	john@core.com	Looking to automate additional processes	2025-07-24T08:50:29.292-07:00
Tech Solutions	Bob	Jones	bob@jones.com	Looking to automate with Workato	2025-07-24T08:52:21.046-07:00
System Consulting	John	Frank	johnfranke@email.com	Looking to automate a few things	2025-07-24T09:50:57.615-07:00
Consulting 101	Sean	Jones	seanjones@email.com	Looking to further automate using Workato	
Consulting 987	Bobby	Lane	bobby@lane.com	Automations	2025-07-24T10:03:02.796-07:00
Acme Consulting	Lisa	Jones	lisa@jones.com	Automations	2025-07-24T10:07:19.938-07:00



# **Utilizing Google Sheets to Create Leads in Salesforce**

# Sample Use Case

## Extract Rental Agreement Data

### Process/Workflow Using Power Automate

- **Assumptions**
  - Monitor email for attachments with subject line of Rental Agreement
  - Data will be extracted from attachments and written to Excel
- **Setup**
  - Utilize Microsoft Power Automate as the trigger
  - Use Microsoft AI Builder to “Train” based on data to extract fields
- **Output**
  - For each attachment extract data
  - Write the following fields:
    - Tenant Name
    - Lease Start Date
    - Lease End Date
    - Monthly Payment

**RENTAL LEASE AGREEMENT**

This Rental Lease Agreement made this on 2<sup>nd</sup> of May, 2022 by and between Andre Lawson the “Landlord” and Preston Morales the “Tenant”. The Landlord and Tenant are collectively referred to in this Agreement as the “Parties”.

For the covenants contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

**1. LEASE TERM.** The term of this Agreement shall be a period of six (6) months, with a start date on 05-09-2022 and ending date on the day 11-07-2022 hereinafter known as the “Lease Term.”

2.1 The Landlord hereby leases to the Tenant certain personal property located at 7 Main St Buffalo, NY 14202 and the Tenant leases the property from the Landlord for the term of the Lease Term.

3.1 The Tenant shall pay to the Landlord throughout the term of the Lease Term the sum of \$2,400 per month on the 1<sup>st</sup> day of each month.

**RENT AGREEMENT**

This Lease contains all of the terms and conditions the Landlord and the Tenant(s) have agreed to.

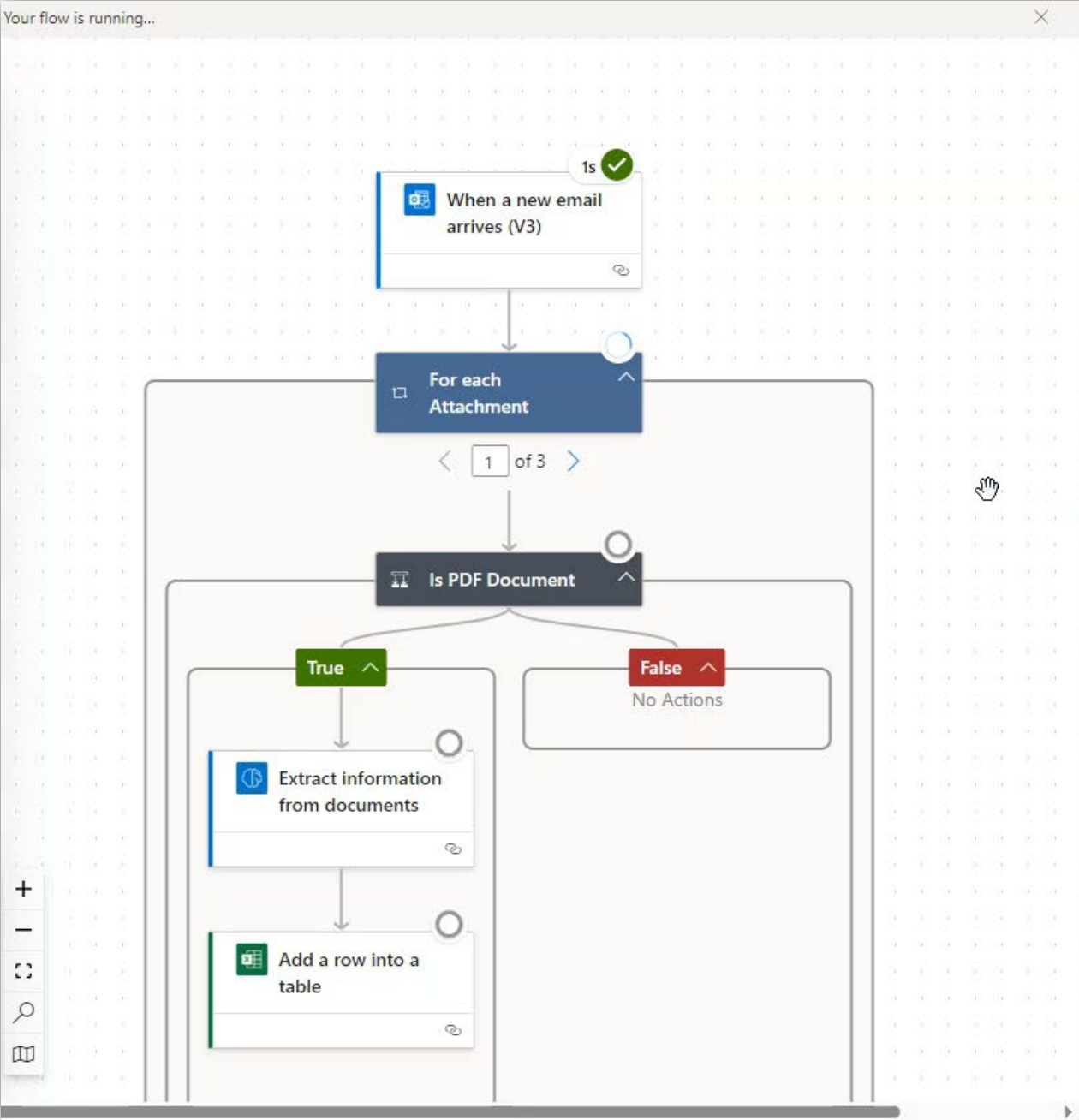
Landlord	Violet Martinez
Premises	345 Lake Street, WA, 87873
Monthly Rent	\$2,400
Lease Start Date	06-01-2022
Lease End Date	12-05-2022
Security Deposit	\$ 5,000
Tenant	Constancia Botas
Insurance	The Landlord is not providing the Tenants with insurance and the Tenants are advised to obtain insurance to protect their personal property from fire, theft, water, and all other types of damage.

Tenant Name | Lease Start Date | Lease End Date | Rental Amount

Andre Lawson	5/8/2022	11/7/2022	1,570
Constancia Botas	6/1/2022	12/5/2022	2,400

Workflow steps:

- 1. Extract information from documents
- 2. Add a row into a table



Clipboard

Font

Alignment

Number

Styles

Cells

Editing

Add-ins

B11

	A	B	C	D	E	F	G
1	Tenant Name	Lease Start Date	Lease End Date	Rental Amount			
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
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31							
32							

Sheet1

Workbook Statistics

# Sample Use Case

## AP Automation

### Process/Workflow Using Power Automate

- **Assumptions**
  - Monitor SharePoint document library for new invoices
  - Data will be extracted from attachments
  - Utilize application to review and validate invoice data
  - View invoice within application
- **Setup**
  - Utilize Microsoft Power Automate to trigger on new invoice
  - Use Microsoft Document Intelligence Pre-Built Invoice Model
  - Use Microsoft PowerApps to review invoice data
  - Use Microsoft Approvals
  - Use Microsoft Power Automate to make updates
- **Output**
  - Data extracted from invoice and displayed in an editable application for review
  - Approval captured and updates status based on action through email adaptive card

PurchaseInvoiceAttachments

ID	Name
23	Adatum 2.pdf
22	Contoso_WingTip.pdf

Invoices

All

New

Pending Approval

Approved

Rejected

Vendor: Contoso Coffee Shop

Invoice #: 1021

Total Amount: \$3,345.87

New

Vendor: ADATUM CORPORATION

Invoice #: 1783

Total Amount: \$90.20

New

Review Invoices

Vendor: Contoso Coffee Shop

Invoice #: 1021

Invoice Total: \$3,345.87

Invoice Date: 2/14/2019 7:00 PM

Item/Product	Qty	Unit Price	Unit(s) Cost	Validated
Cafe S-100 Semi-Automatic	20	486.33	9726.6	<input type="checkbox"/>
Cafe A-100 Automatic	5	948.75	4743.75	<input checked="" type="checkbox"/>
Cafe A-200 Automatic	15	682.35	10235.25	<input type="checkbox"/>
Cafe S-200 Semi-Automatic	3	56.97	170.91	<input type="checkbox"/>
Cafe Corto	8	743.68	5949.44	<input type="checkbox"/>

Cancel

Submit for Approval

Contoso Coffee Shop

Invoice # 1021

3720 159th Ave NE

Bellevue, WA 98002

Bill to: WingTip Cups

Contact: b.briday@wingtipcups.com

677 9th Ave

New York, NY 10002

Date Feb 14, 2019

Due Date Feb 28, 2019

Balance due: \$3,345.87 USD

Item	Quantity	Unit cost	Amount
Cafe A-100 Automatic	5	\$189.75	\$948.75
Cafe A-200 Automatic	15	\$45.41	\$682.15
Cafe S-200 Semi-Automatic	3	\$18.99	\$56.97
Cafe S-100 Semi-Automatic	20	\$24.33	\$486.33
Cafe Corto	8	\$92.96	\$743.68
Subtotal			\$2918.06
Tax (10%)			\$291.80
Shipping			\$135.99
Total			\$3,345.87




# **Adding Invoice to SharePoint Document Library**

# Sample Use Case

## Locate HR Information Quickly

### Utilizing Power Platform

- **Assumptions**
  - Organization utilizes SharePoint, but it is difficult to always find information. They want an Agent Bot to quickly find information related to HR policies and provide a summary response to the questions asked by the user
- **Setup**
  - Utilize Microsoft CoPilot Studio
  - Utilize Microsoft SharePoint
  - Utilize Microsoft Teams
- **Output**
  - A response to the question asked including links to the information that was used to generate the response



Name


HR Bot

Description

An agent designed to assist with topics related to Human Resources and employee benefits. It provides information, guidance, and support on various HR-related matters, including employee benefits, policies, and procedures.

Instructions

- Provide accurate and up-to-date information on HR-related topics.
- Assist users with inquiries about employee benefits, policies, and procedures.
- Offer guidance on HR best practices and compliance.
- Respond to user queries in a friendly and professional manner.
- Ensure confidentiality and privacy of sensitive information.
- Avoid discussing topics outside the scope of Human Resources and employee benefits.



HR Bot

Built using Microsoft Copilot Studio

Employee Benefits

What are the available employee benefits?

HR Policies

Can you explain the company's HR policies?

Leave Requests

How can I request leave?

Onboarding Process

What is the onboarding process for new employees?

Compliance

What are the compliance requirements for HR?

Performance Reviews

How are performance reviews conducted?

HR Bot

AI generated 2:18 PM

The travel expense policy at Contoso includes the following guidelines:

1. Eligible travel expenses include airfare, lodging, ground transportation (such as parking fees).
2. All expenses must be directly related to company business and must be reasonable.
3. Employees are required to obtain prior approval from their manager for any expenses exceeding \$500.
4. Expense reports must be submitted within 30 days of incurring the expense to ensure timely reimbursement.
5. Original receipts must be submitted for all expenses, and expense reports must include the date, amount, and purpose of each expense.
6. Credit card statements alone are not sufficient documentation.
7. Reimbursements will be processed within 15 business days of receipt of the approved expense report.

2:18 PM

What is the benefits for paternal leave?

HR Bot

AI generated 2:19 PM

During paternal leave at Contoso, eligible employees will continue to receive their regular salary and benefits. Upon return from paternal leave, employees will be restored to their original or an equivalent position with equivalent pay, benefits, and other employment terms.

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# HR Bot

Built using Microsoft Copilot Studio

## Employee Benefits

What are the available employee benefits?

## HR Policies

Can you explain the company's HR policies?

## Leave Requests

How can I request leave?

## Onboarding Process


What is the onboarding process for new employees?

## Compliance

What are the compliance requirements for HR?

## Performance Reviews

How are performance reviews conducted?

 [View prompts](#)

Type a message



# Sample Use Case

## Manage Email & Auto Replies

### Utilizing Power Platform

#### • Assumptions


- Organization receives many different types of inquiries
- Each inquiry may require a different group to respond

#### • Setup

- Utilize Microsoft CoPilot Studio
- Utilize Microsoft Outlook
- Utilize Microsoft Power Automate

#### • Output

- Uses AI to understand the intent of the email and saves the email to a shared inbox folder based on the intent
- If a specific subject is requesting scheduling information, it replies with an email about the intent and states someone will be reaching out to schedule a time



Name  
Email Monitor

---

**Description**  
You are an agent that will monitor new emails that come in to the inbox and will properly categorize those emails based on the instructions below.

---

**General instructions**  
**\*\*Task:\*\*** Monitor the email inbox continuously.  
  
**\*\*Instructions:\*\***  
**\*\*Analyze Incoming Emails:\*\*** For each incoming email, analyze the content thoroughly.  
**\*\*Categorize Emails:\*\*** Categorize each email into one of the following categories based on its primary subject matter:  
**\*\*Sales:\*\*** Emails related to customer inquiries, product information, sales pitches, order confirmations, or any communication aimed at generating revenue.  
**\*\*Operations:\*\*** Emails concerning day-to-day business activities, logistics, project management, internal processes, or coordination between departments.  
**\*\*Finance:\*\*** Emails involving financial transactions, invoices, budget reports, expense approvals, or any communication related to monetary matters.  
**\*\*Volunteering:\*\*** Emails about volunteer opportunities, community service projects, volunteer coordination, or any communication related to volunteer activities.  
**\*\*Other:\*\*** If the content does not clearly fit into Sales, Operations, Finance, or Volunteering, categorize the email as 'Other.'  
  
**\*\*Output Format:\*\*** Output as a JSON object.  
  
**\*\*Respond to Volunteering Inquiries\*\***  
If the context of the email is about volunteering and the sender is asking about scheduling, respond with a well-formatted email using the "Reply to Volunteer" action. The response should:  
1. **\*\*Thank them for reaching out.\*\***  
2. **\*\*Summarize the understanding of the request in the original email.\*\***  
3. **\*\*Provide the contact information of the Volunteer Coordinator.\*\***  
4. **\*\*State that someone from the office will be reaching out to them.\*\***  
5. **\*\*Provide the phone number 1-234-567-8901 if they want to talk to someone directly.\*\***  
  
The response will create a well-formatted message body using HTML with proper line breaks. It will use the MessageId from the original email and pass that as a parameter along with the email address in the FROM of the original email.  
If it is a Volunteer Schedule Request, do not move the email until after the reply email has been sent.





# 07

## Real-World Examples



# Real-World Examples

## Multiple Industries



### Manual Data Entry Became too Much

#### The Situation

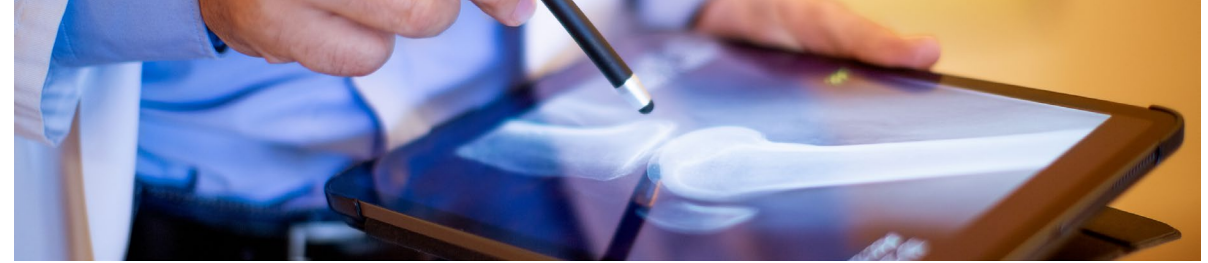
Distributor outsourced data entry of sales orders.

#### The Solution

Built a solution using Robotic Process Automation (RPA) to enter in more than 3,000 order lines per day into their ERP system which is based on an AS/400 (Green Screen).

#### The Benefits

Since introducing the use of RPA, the company has been able to efficiently input orders with increased speed and higher data quality while **reducing costs by more than \$200k per year**.



### Systems Lacked Modern Integrations

#### The Situation

Healthcare company leveraged an Electronic Medical Records (EMR) that lacked the ability to automate the export of GL data and import into their Enterprise Resource Planning (ERP) system. The system required an individual to make at least seven clicks per location.

#### The Solution

Used RPA to mimic the export of GL data from the EMR system, transformed the data, and prepped for ingestion into the ERP.

#### The Benefits

The use of RPA automates the process of clicking more **than 1680 times (240 different locations)** and automates the integration allowing employees to focus on high value tasks.

# Real-World Examples

## Other Industries



### Streamlined Digital Filing

#### The Situation

The client managed an inbox and looked for signed documents and would download and file those into the proper SharePoint location.

#### The Solution

The client implemented the use of the Power Platform to monitor, extract data from signed documents, and automatically file signed documents to proper location based on data from document.

#### The Benefits

The client has estimated that automating this process will **save an employee up to 520 hours annually**. Additionally, it is projected to achieve a **128% ROI in the first year**.



### Automated Purchase Request Coding & Approval

#### The Situation

The client required key individuals to identify specific information on purchase requests prior to approval. The technicians are never at their desk, and they need an easy way to obtain the data in a timely fashion.

#### The Solution

The client implemented a mobile application using Power Apps with their ERP system to send mobile notifications requesting information.

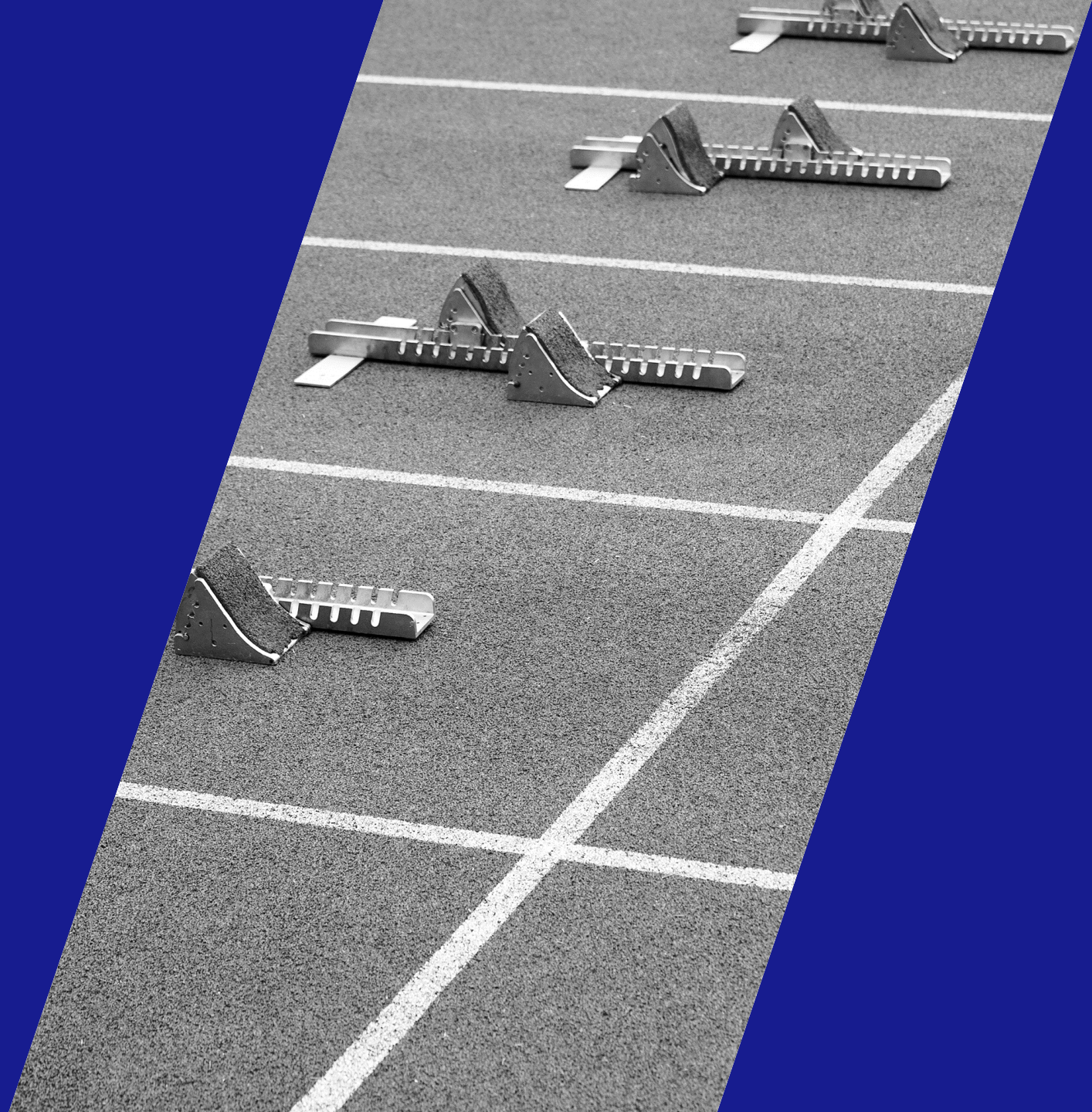
#### The Benefits

The client saw **increased accuracy and timely capture of data** for the approval process and payment for outstanding invoices.



# 08

Are You Ready?





# Key Takeaways



## Efficiency

Hyperautomation drives efficiency in businesses by automating repetitive tasks, optimizing processes, and reducing manual intervention.



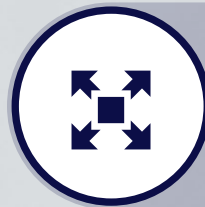
## Accuracy

Hyperautomation looks to minimize the risk of human errors leading to enhanced accuracy of data within a financial process.



## Reallocate

Hyperautomation enables workers to focus on activities that require critical thinking to enhance overall business productivity.



## Scalability

Hyperautomation supports the growing workloads of resources without increasing the number of human resources.





# Call to Action

- Embrace the power of hyperautomation
- Your journey begins now, and it's never too late
- Focus on your unique business processes and dare to break away from the crowd

# Contact

## Forvis Mazars

**Ryan Kauzlick**  
Director, Insights & Automation  
P: 703.434.0050  
[ryan.kauzlick@us.forvismazars.com](mailto:ryan.kauzlick@us.forvismazars.com)



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