



Hyperautomation **Practical Tools, Strong Results**

December 9, 2025

Ready to Reach Your Potential?



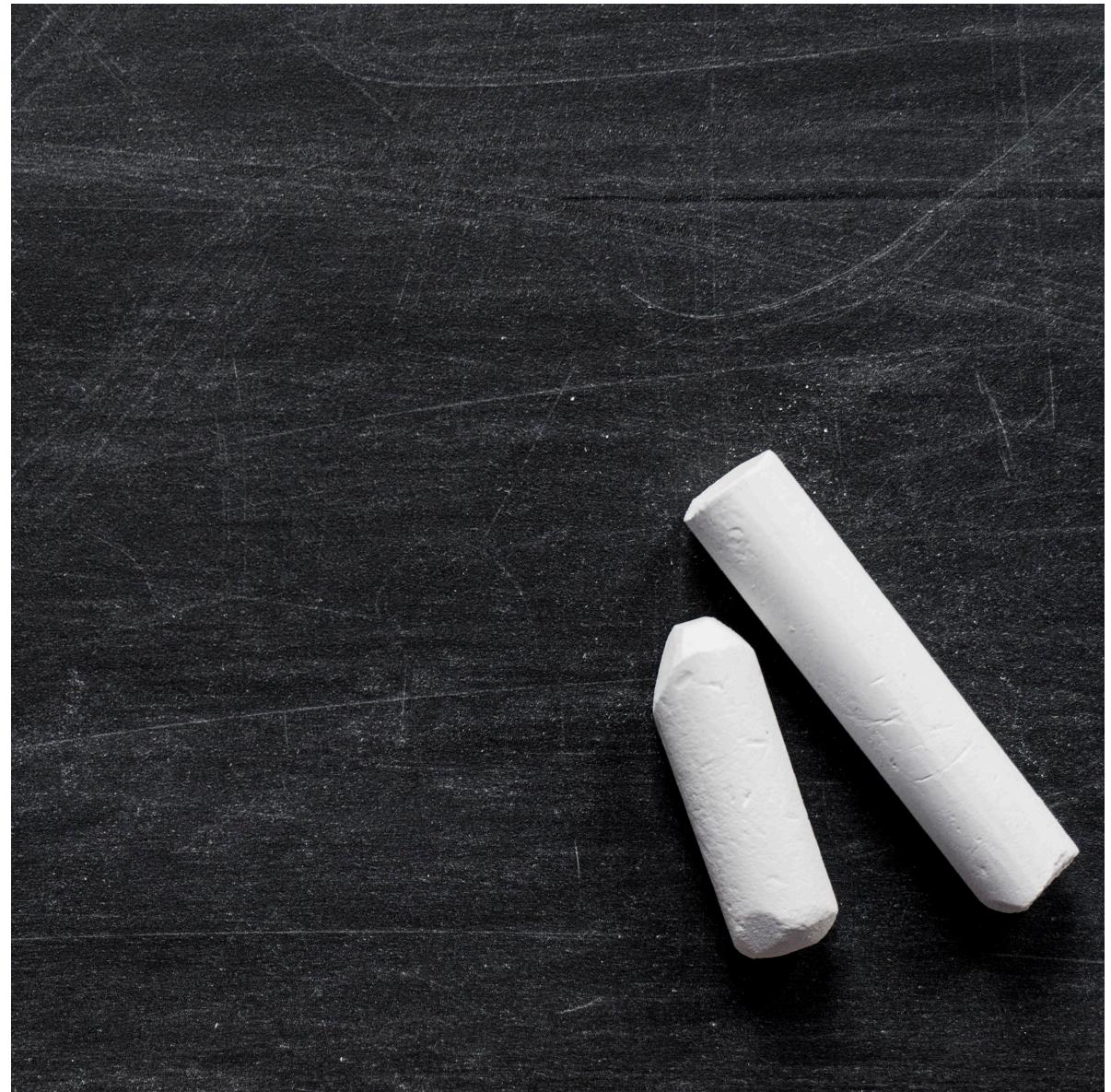
Director, Intelligence & Automation

Ryan Kauzlick

Forvis Mazars
Business Technology Services

Learning Objectives

1. Understand Hyperautomation
2. Learn the Applications of Hyperautomation
3. Learn the Benefits of Hyperautomation
4. Learn Implementation Strategies
5. See Real-World Use Cases



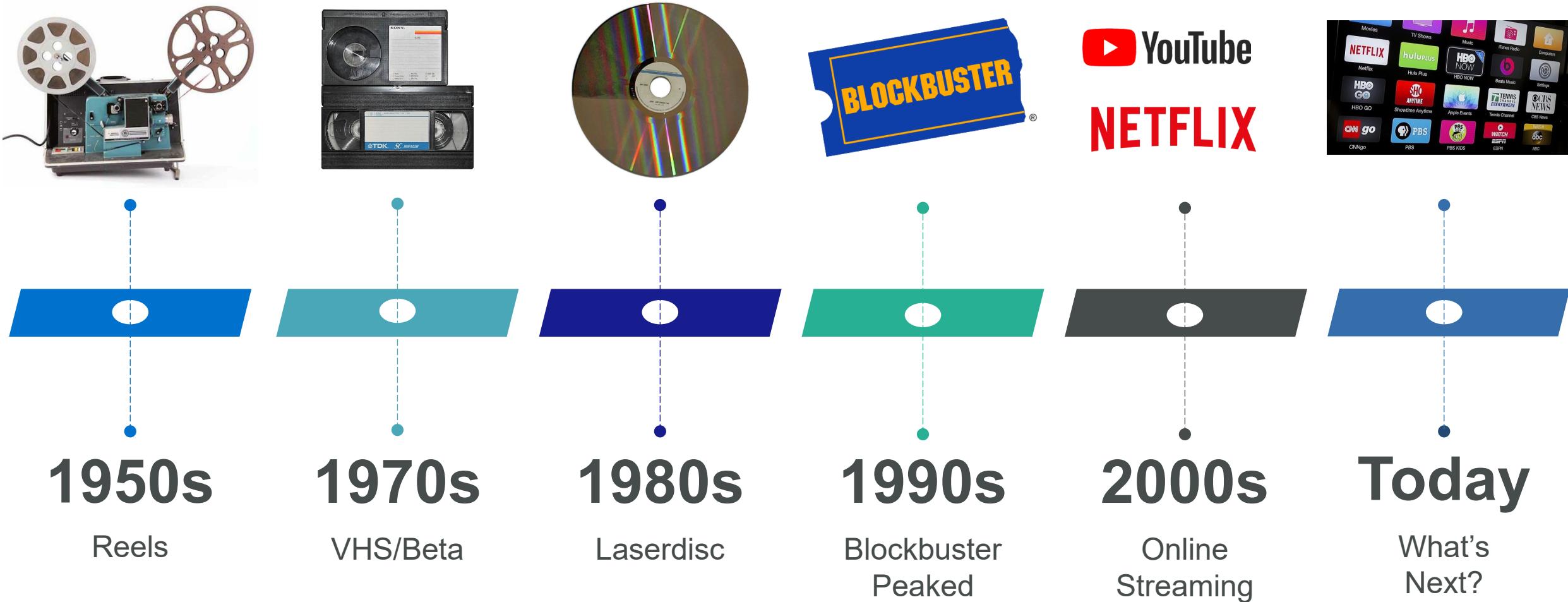
01

“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



02

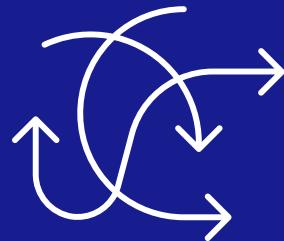
Houston, We've Got a Problem



Headwinds Facing Organizations

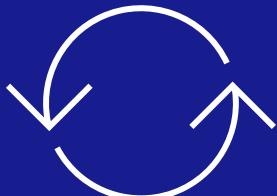
Is Automation Right for You?

Inefficient Processes



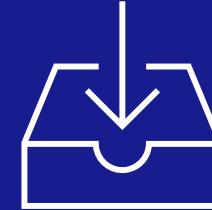
On average companies lose **20–30%** of revenue each year due to inefficient processes¹

Opportunity for Automation



On average workers spend **520 hours** annually on tasks that could be automated²

Work Overload



On average **68%** of workers suffer from work overload in which they have too much to handle daily³

¹ [How Inefficient Processes Are Hurting Your Company](#)

² [How Repetitive Tasks are Hurting Your Business](#)

³ [Key Business Automation Statistics You Should Know](#)

Headwinds

The Cost of Doing Business

Have you considered hyperautomation to address these critical challenges?

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





I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail.

- Abraham Maslow



*If all I hear about is Artificial
Intelligence (AI), I suppose I should
use AI for everything?*

- Ryan Kauzlick

AI Adoption Are You Getting the Right Return?

Have you gone beyond ChatGPT and Microsoft Copilot?

Deployment Rates

5%

Solutions making it to production

Getting No Return

95%

Are getting zero (0.0%) return on their investments in AI

Current Investment \$

50%

Percent of funds going to Sales & Marketing; however, back-office processes yield higher ROI

Hiring Trend

>80%

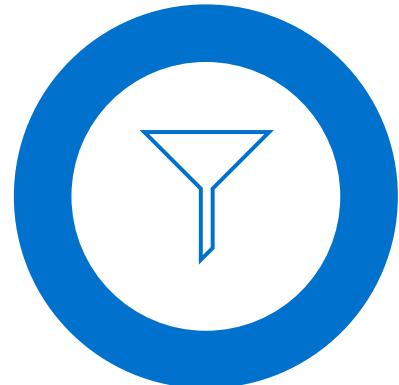
Executives anticipate reduced hiring volume in next 24 months



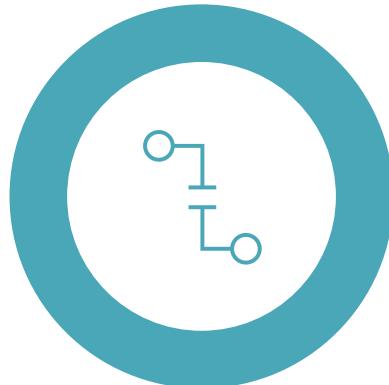
Business Challenges

Turning Challenges Into Opportunities

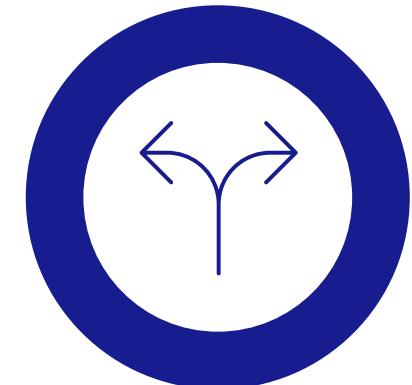
Operational Bottlenecks



Disconnected Systems



Fragmented Data



Enterprise Automation

Compliment, Connect, and Make Intelligent Decisions

Is there true value?

What do these numbers have in common?

187 %

260 Hrs.

96 %

\$5 m

205 %

391 %

520 Hrs.

128 %

\$ 225 k

03

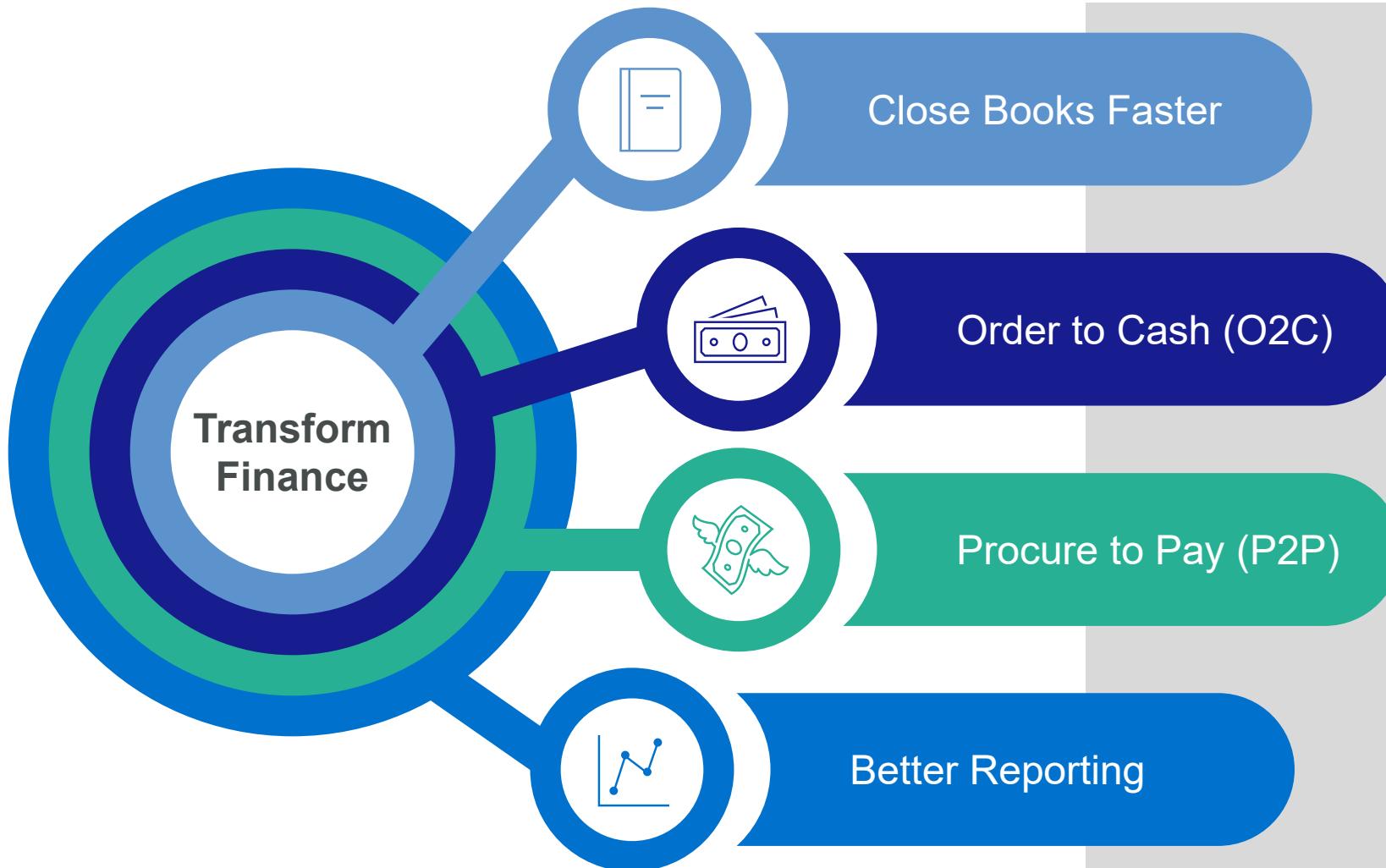
Opportunity

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

– Dwayne “The Rock” Johnson



Transform How Finance Operates



Automate journal entries, reconciliation, & streamline approvals w/ built-in compliance

Orchestrate quote, order, fulfillment, invoicing, & revenue recognition

Integrate procurement Apps, perform 2/3-way matching, & streamline approvals

Unify data across systems, automate approvals, & create actionable insights

What If ... Opportunity Cost

What if there was 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 Check Processing

- **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

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 backpack
Use the Right Tool for the Job

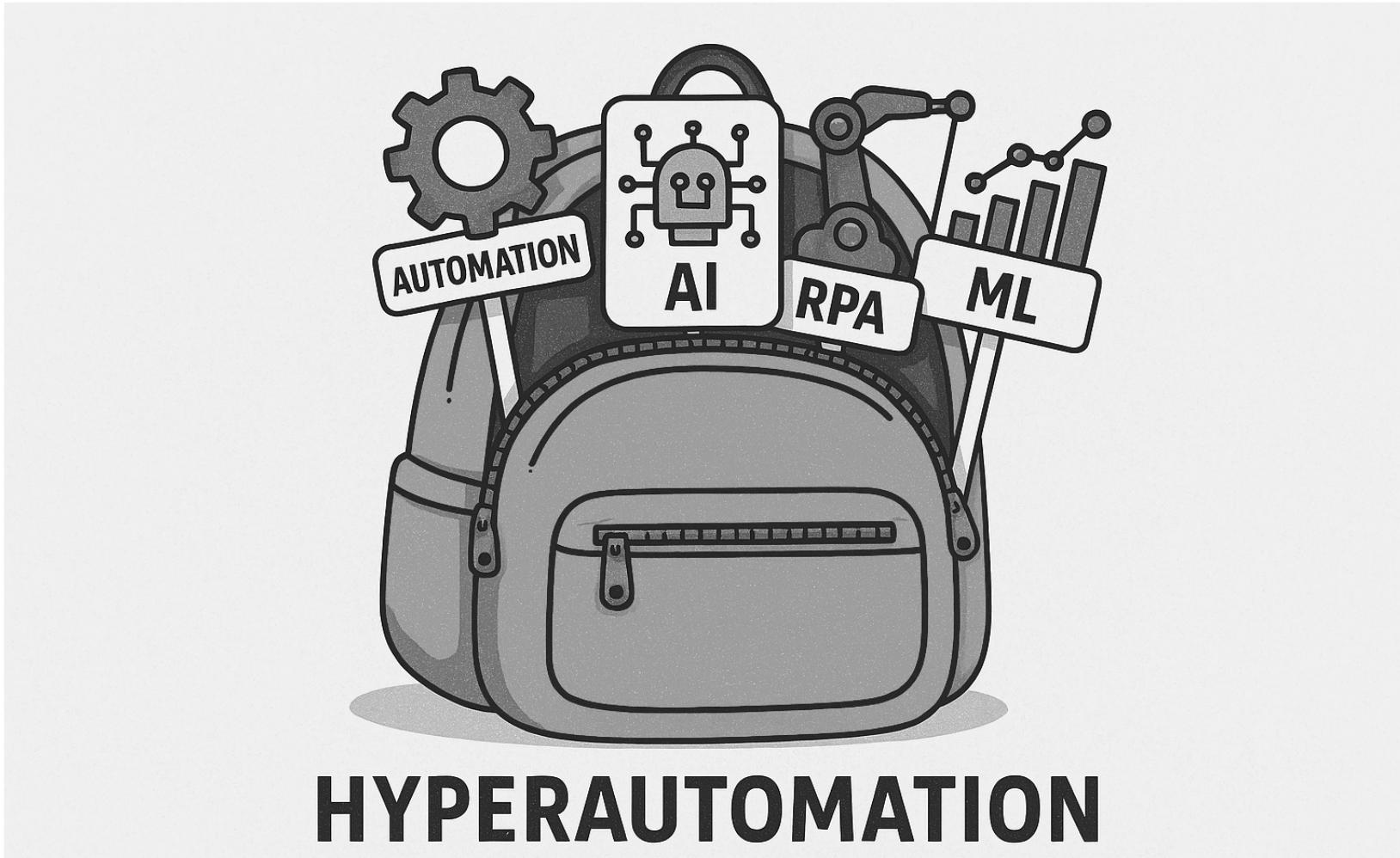


Image was created with Microsoft Copilot

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04

Where to Start



The AI and Automation Roadmap

Your journey to build an AI program and become a strategic advisor



Center of Excellence: Identify, Prioritize, Govern, Implement, Optimize

Drive quality results through right-sized process and governance

Lead Through Change

Foster AI forward culture to drive adoption

Strategize & Align

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



Adoption

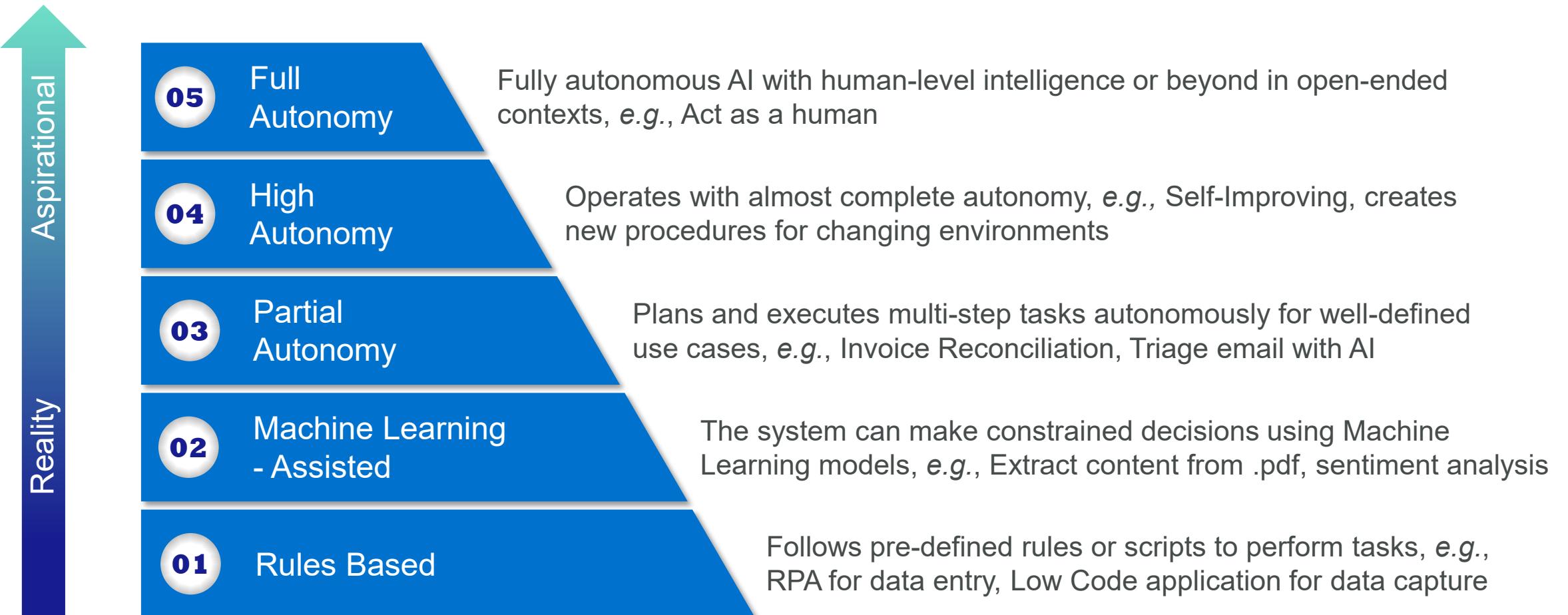
04



Employee
Engagement

Enterprise Automation

Levels of Autonomy



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

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05

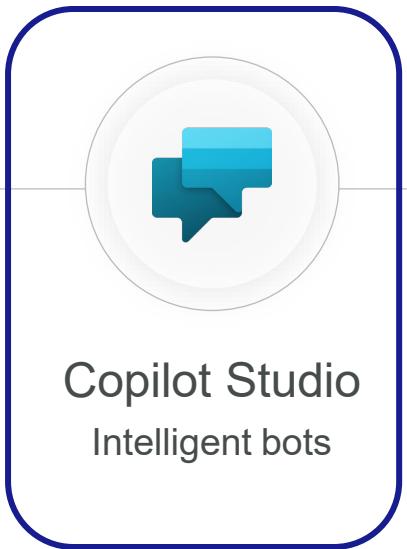
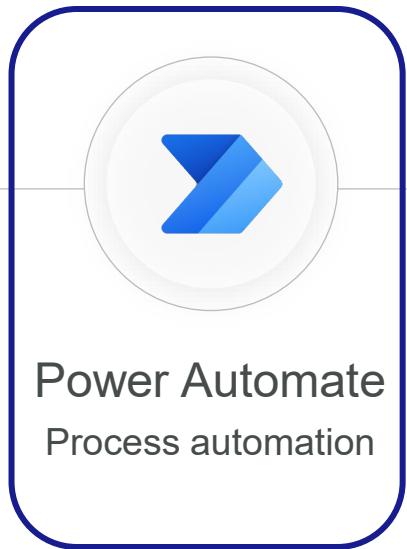
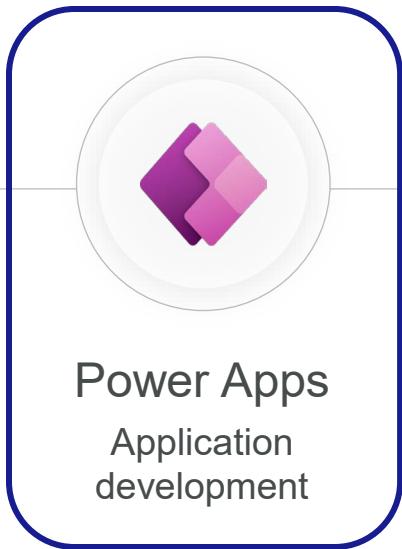
A Comprehensive Platform



Microsoft Power Platform

A Comprehensive Automation Platform

Powered by Low-Code & AI Applications



Power Pages
Business websites



Power BI
Business analytics



One platform to innovate at scale



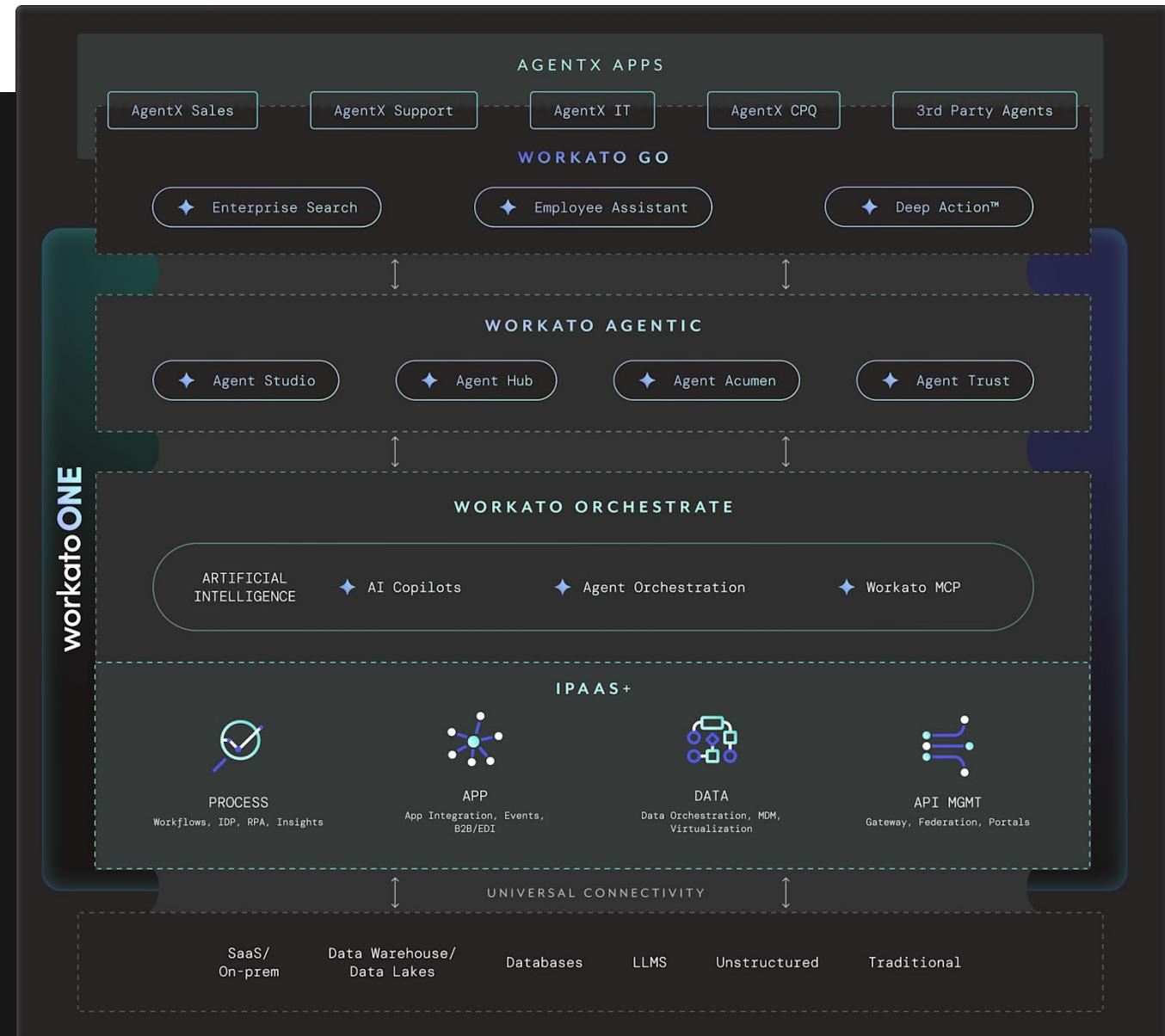
**Embrace versatility,
tame complexity**



**Democratize
transformation**



**Scale your
success with AI**



Source: [The #1 iPaaS for the AI and Agentic Era | Workato](#)

**forv/s
mazars**

06

Practical Use Case



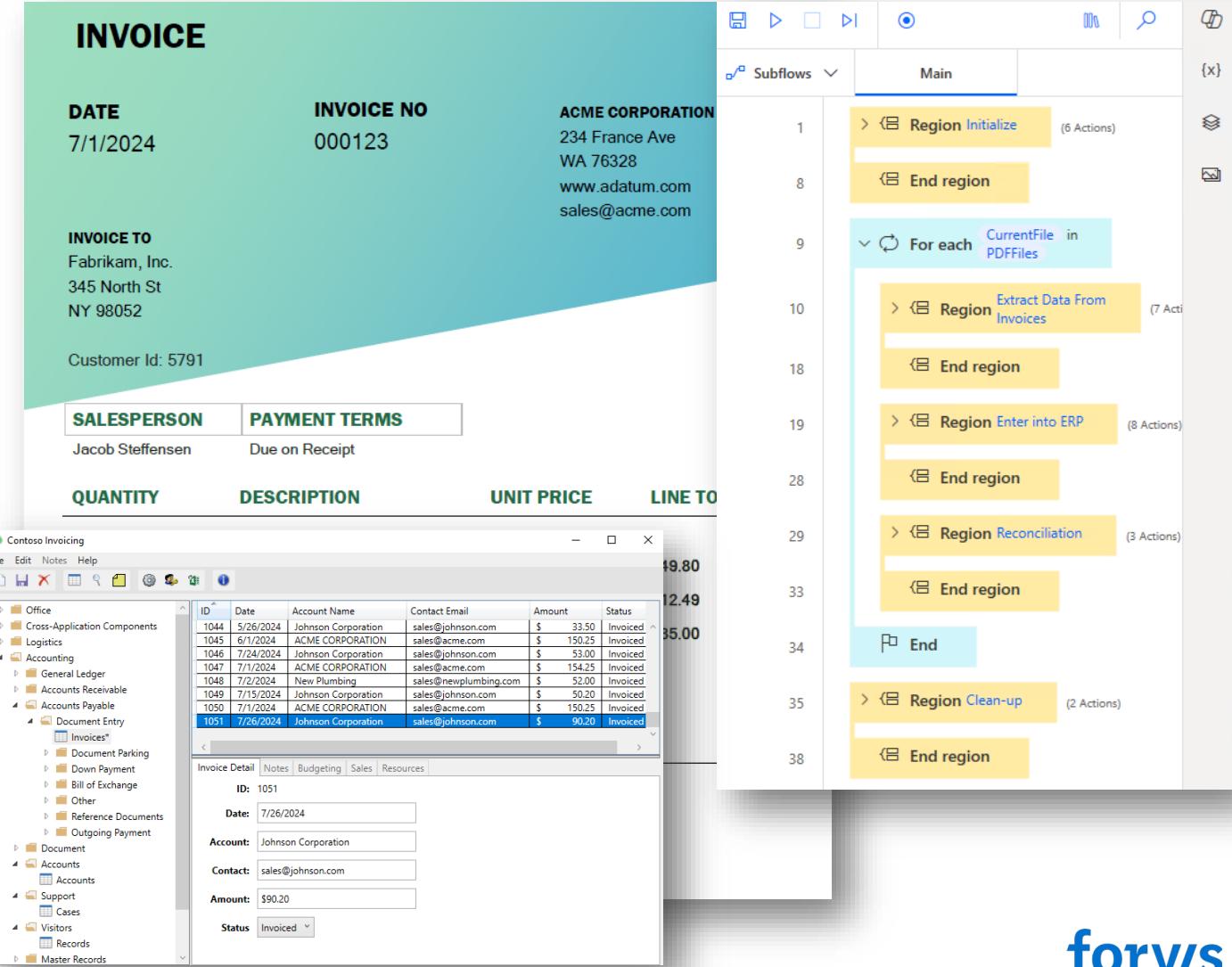
Sample Use Case

Write Invoice Data to System

Utilizing Robotic Process Automation (RPA)

Requirement

The team must input data into a disparate system.



The image shows a screenshot of a robotic process automation (RPA) tool interface. On the left, there is a flowchart titled 'Main' with various steps and regions. On the right, there is a data entry window for an 'INVOICE'.

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: Jacob Steffensen **PAYMENT TERMS**: Due on Receipt

QUANTITY	DESCRIPTION	UNIT PRICE	LINE TO
			19.80
			12.49
			35.00
			35.00

Contoso Invoicing

Invoice Detail

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	7/2/2024	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

Region Initialize (6 Actions)
End region

For each CurrentFile in PDFFiles

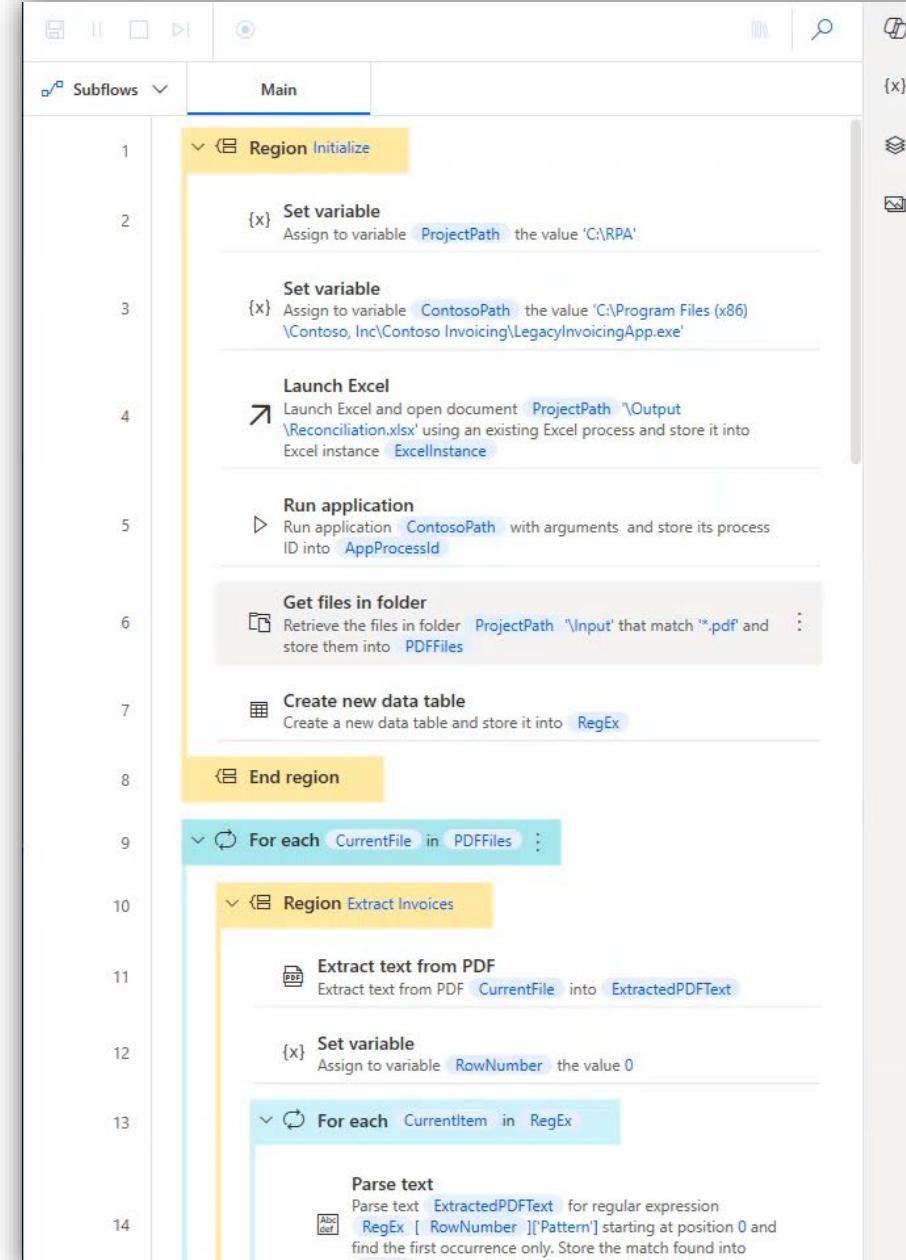
Region Extract Data From Invoices (7 Actions)
End region

Region Enter into ERP (8 Actions)
End region

Region Reconciliation (3 Actions)
End region

End

Region Clean-up (2 Actions)
End region



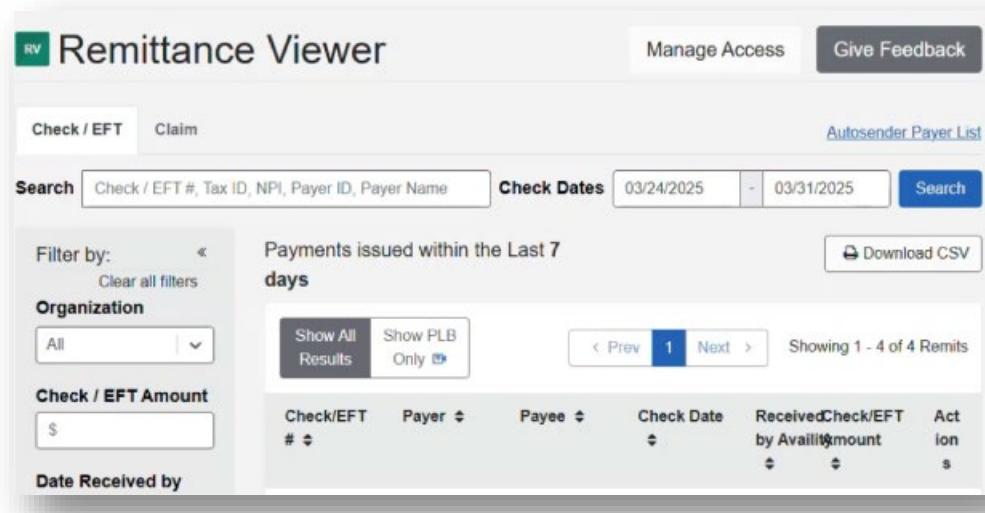
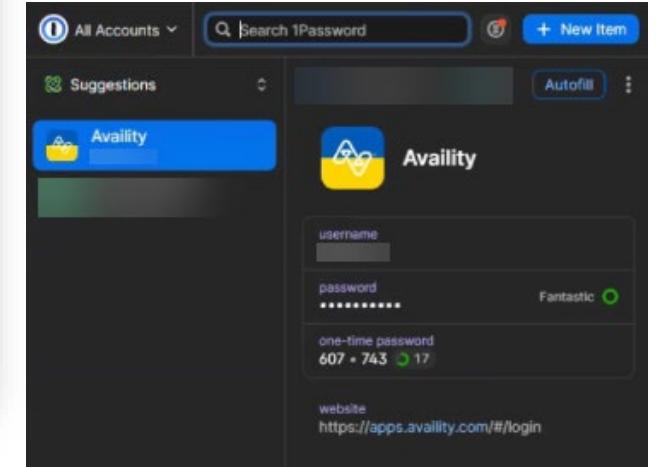
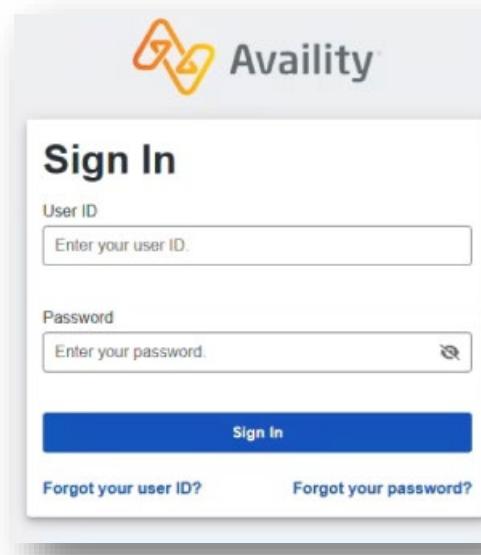
Sample Use Case

Download Files From Web Application

Utilizing Power Automate Desktop

Requirement

The team requires the downloading of data from website daily.

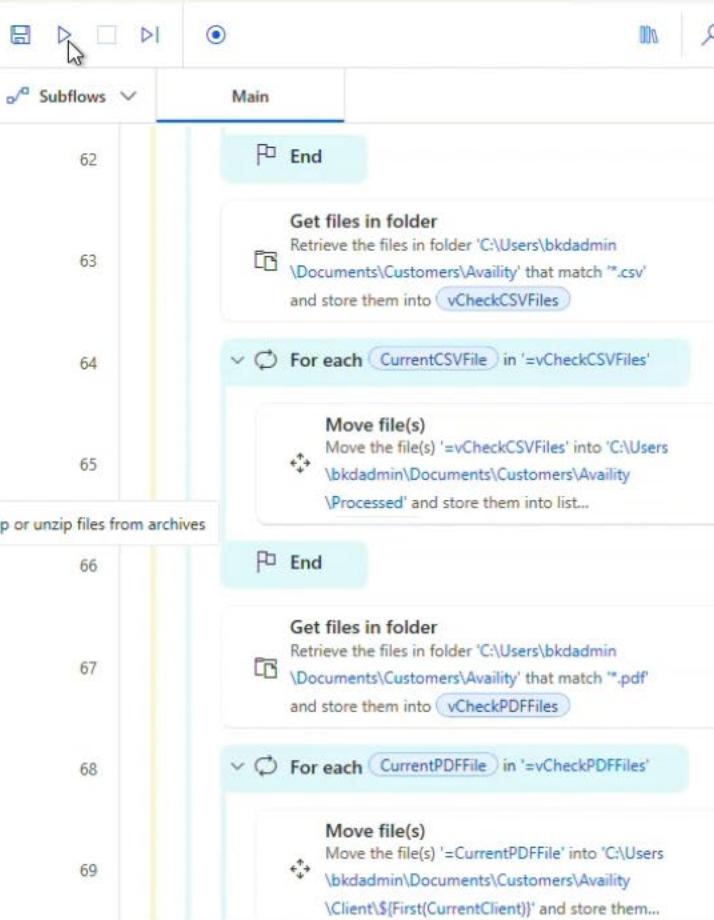


Power Fx is enabled for this flow. [Learn more](#)

Actions

Search actions

- > Variables
- > Conditionals
- > Loops
- > Flow control
- > Run flow
- > System
- > Workstation
- > Scripting
- > File
- > Folder
- > Compression
- > UI automation
- > HTTP
- > Browser automation
 - > Web data extraction
 - > Web form filling
 - ↳ If web page conta...
 - ↳ Wait for web page...
 - ↳ Launch new Inter...
 - ↳ Launch new Firefox
 - ↳ Launch new Chro...
- See more actions



Variables

Search variables

Input / output variables 0

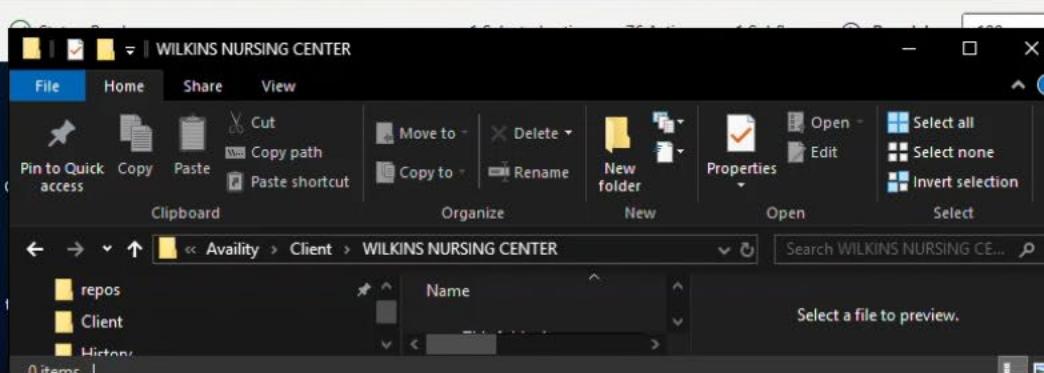
There aren't any input or output variables here yet

Flow variables 16

- (x) AvailabilityBrowser Web browser insta...
- (x) CurrentCheck... C:\Users\bkdadmi...
- (x) CurrentClient 1 columns { Colum...
- (x) CurrentCSVFile C:\Users\bkdadmi...
- (x) CurrentItem 6 columns { Check...
- (x) CurrentPDFFile C:\Users\bkdadmi...
- (x) Files
- (x) MovedFiles

ms

! Errors list (1)



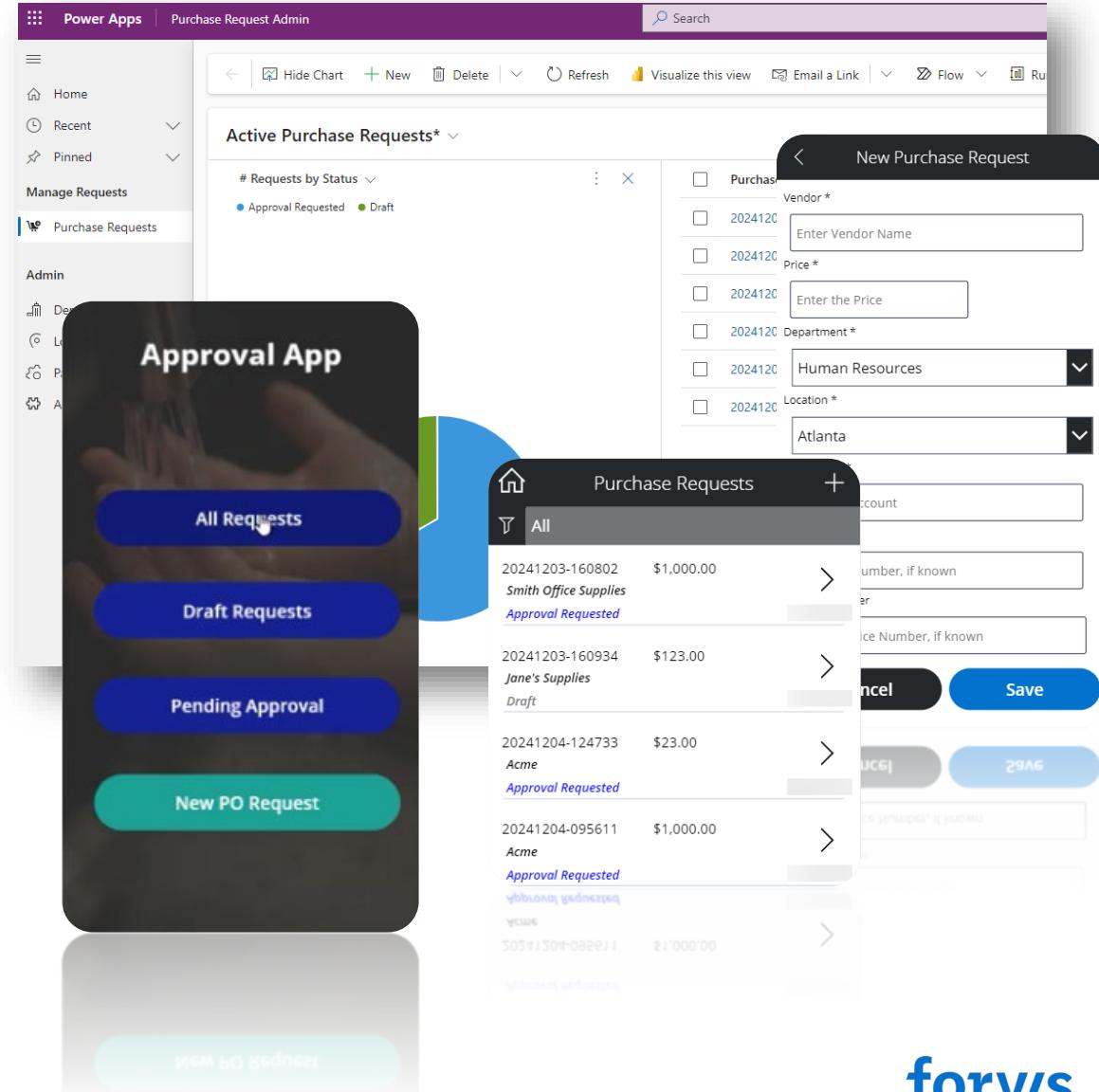
Sample Use Case

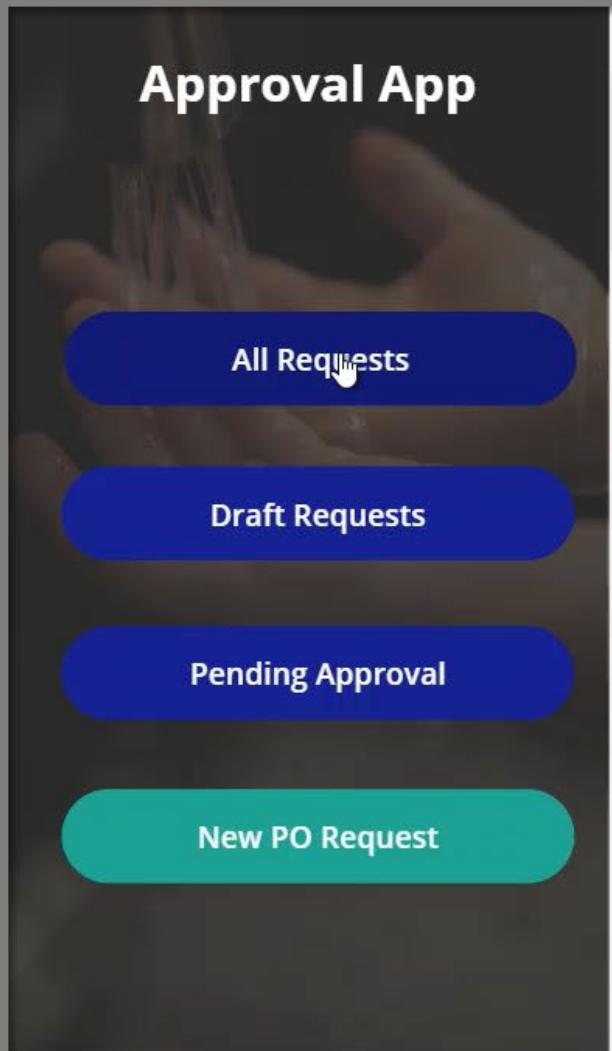
Purchase Request Submission

Utilizing Power Platform

Requirement

The team requires the ability to submit purchase requests and approve.





Active Purchase Requests*

<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

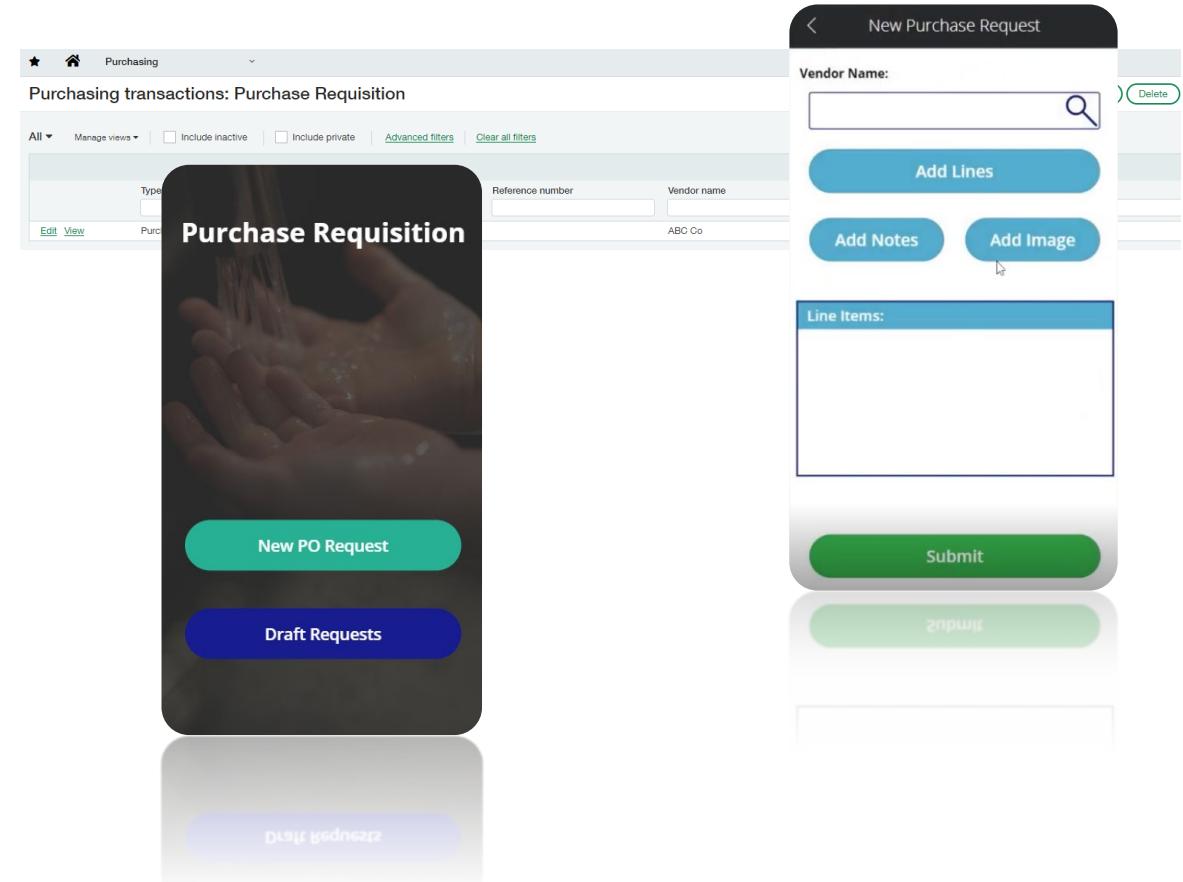
Sample Use Case

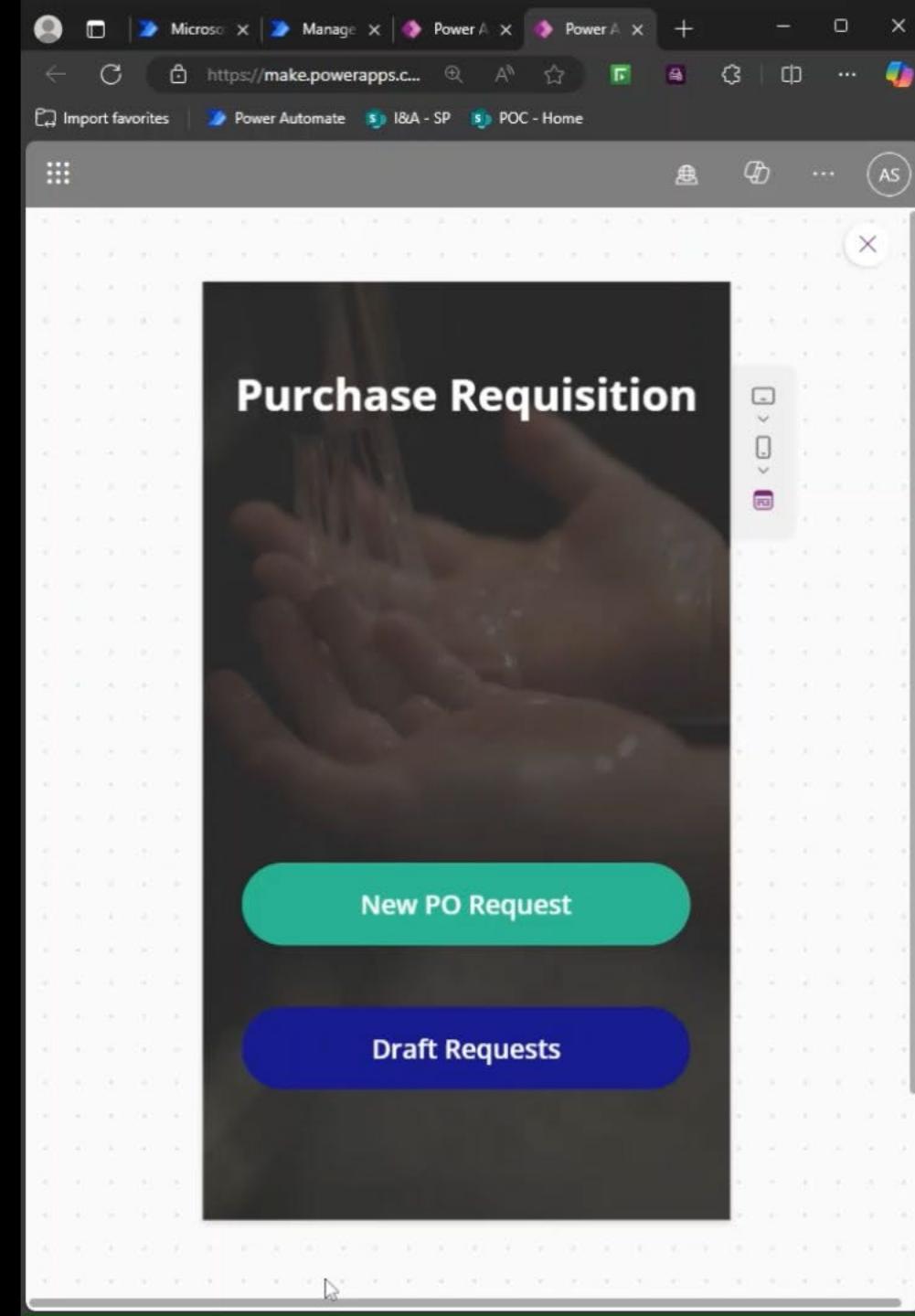
Purchase Requisition – Sage Intacct

Utilizing Power Platform

Requirement

The team requires the ability to submit purchase requests and integrate directly into an ERP with reference data for better reporting.





Sample Use Case AP Automation

Process/Workflow Using Power Automate

Requirement

The team must efficiently extract, verify, and approve invoices.

The screenshot illustrates a Power Automate workflow for invoice management. It consists of two main steps:

- Review Invoices:** This step shows a table of invoice items for vendor Contoso Coffee Shop, invoice #1021, dated 2/14/2019. The table includes columns for Item/Product, Qty, Unit Price, Unit(s) Cost, and Validated. A 'Submit for Approval' button is at the bottom.
- Invoices:** This step shows a list of invoices. The first invoice is for Contoso Coffee Shop, invoice #1021, total amount \$3,345.87. The second invoice is for ADATUM CORPORATION, invoice #1783, total amount \$90.20. Both invoices have a 'New' button next to them.

Adding Invoice to SharePoint Document Library

Sample Use Case

Locate HR Information Quickly

Utilizing Power Platform

Requirement

The team needs access to information quickly across multiple subjects.

The image shows the Microsoft Copilot Studio interface. At the top, there is a card for the 'HR Bot' configuration, which includes the bot's name, description (a general HR information bot), and instructions (a list of 7 points about providing accurate HR information). Below this, there are four cards representing different HR topics: Employee Benefits, HR Policies, Leave Requests, Onboarding Process, Compliance, and Performance Reviews. Each card has a question and a link to 'View prompts'. At the bottom, a chat window shows a conversation with the HR Bot. The bot has responded to two questions: one about travel expense policy guidelines (listing 7 points) and one about the benefits for paternal leave (mentioning salary continuation and restoration to original or equivalent position). The interface includes a message input field and a toolbar with various icons.



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?

Type a message

I

 View prompts



Sample Use Case

Manage Email & Auto Replies

Utilizing Power Platform

Requirement

Monitor an email inbox and categorize emails based on the content and respond if email is asking about Volunteering.

 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.

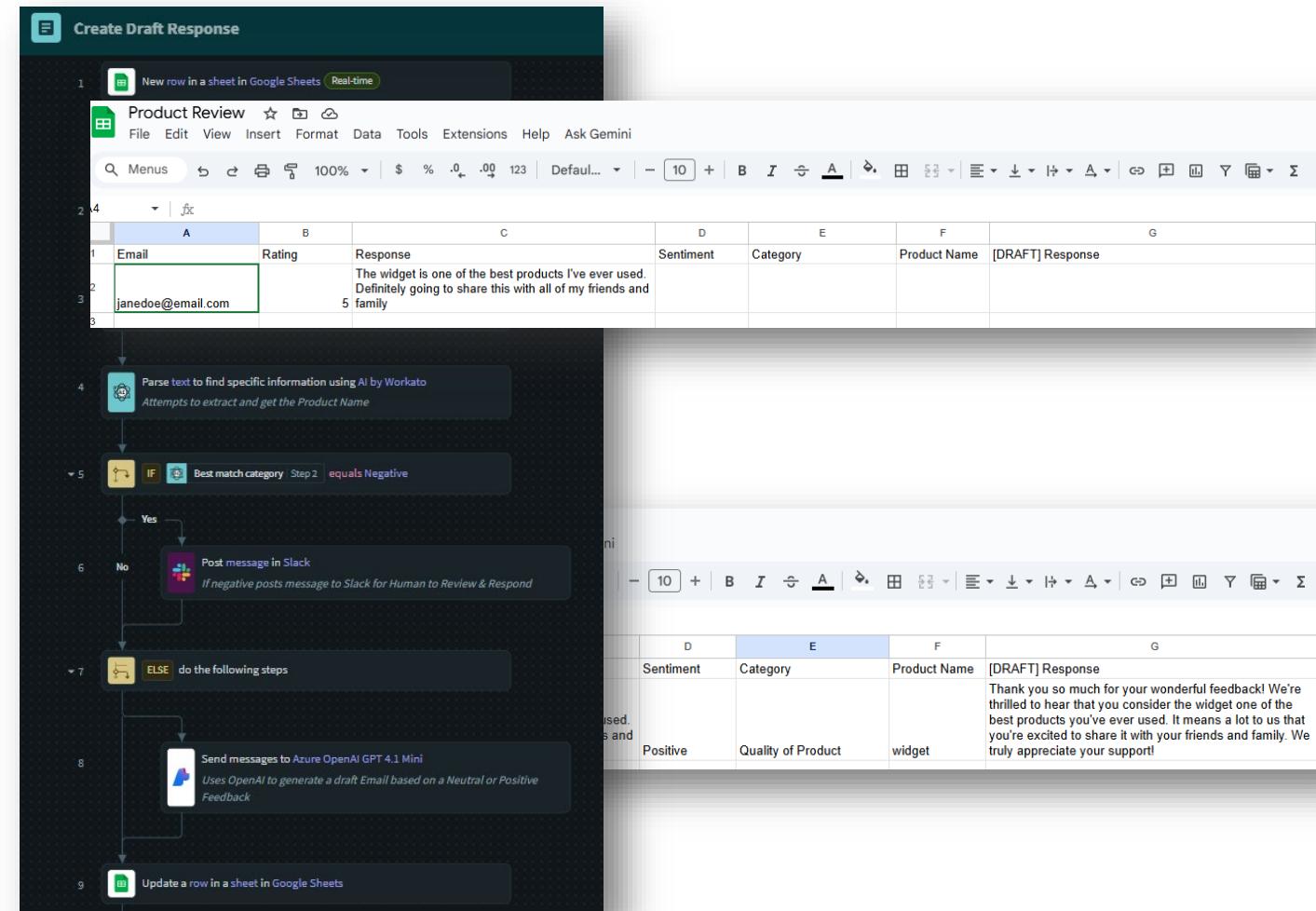
Sample Use Case

Manage Product Feedback & Draft Responses

Utilize Workato to proactively engage customers

Requirement

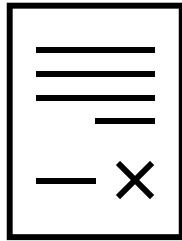
Receive reviews / feedback on products and want to draft email responses based on sentiment of feedback



**Imagine a new
Product Review
has been
received**

Common Automation Challenges Higher Education

Transcript Processing



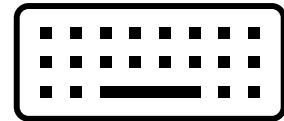
Leverage Workato's Services to extract key data from transcripts, providing structured data for seamless integration with accounting systems.

Student Engagement



Transform your students' experience with a custom mobile app built on Microsoft Power Apps! Help them easily find key services and connect with their peers, all in one seamless platform.

Data Entry & Processing



Utilize Robotic Process Automation (RPA) to input and/or cross-check student applications and or submissions across multiple disparate systems.

07

Real-World Examples



Real World Examples Other Industries



Manual Data Entry Became Too Much

The Situation

Specialty food 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 7 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



Vertical Sales Opportunities Passed Them By

The Situation

The Growth Solutions team manually creates over 180 item match files for Sales, a process that is highly time-consuming and involves pulling data from multiple systems and takes upwards of one week to analyze.

The Solution

Implemented an RPA solution that combined data from multiple systems and ran analysis to determine which items should be sold into stores.

The Benefits

Growth Solutions was able to **identify more than \$120m** in vertical sales opportunities. This solution reduced the time from a week down to hours to perform the analysis and **resulted in \$5m in new revenue in the first three months.**



Bank Reconciliation Became Too Time Consuming

The Situation

A local city government utilized a very manual process to perform its bank reconciliation on a daily basis. This process took an extensive amount of time, and they were looking at a way to automation.

The Solution

Utilizing RPA, a solution was built to extract GL data from a web-based ERP system and combine data from the bank transaction file to allow the department to manage to exceptions vs. reviewing each transaction.

The Benefits

The implementation of the RPA solution is saving the team **more than 260 hours per year** to focus on higher value tasks where they are already stretched thin due to limited staff.

Real World Examples Other Industries



Streamline 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**.



Payroll Audit at Scale

The Situation

The client needed to comply with the NY 421A Affordable Housing Program to validate they are paying living wage rates in New York City. **Two (2) full-time employees** transcribed the image data into an Excel workbook **each month from 40–60 different contractors**.

The Solution

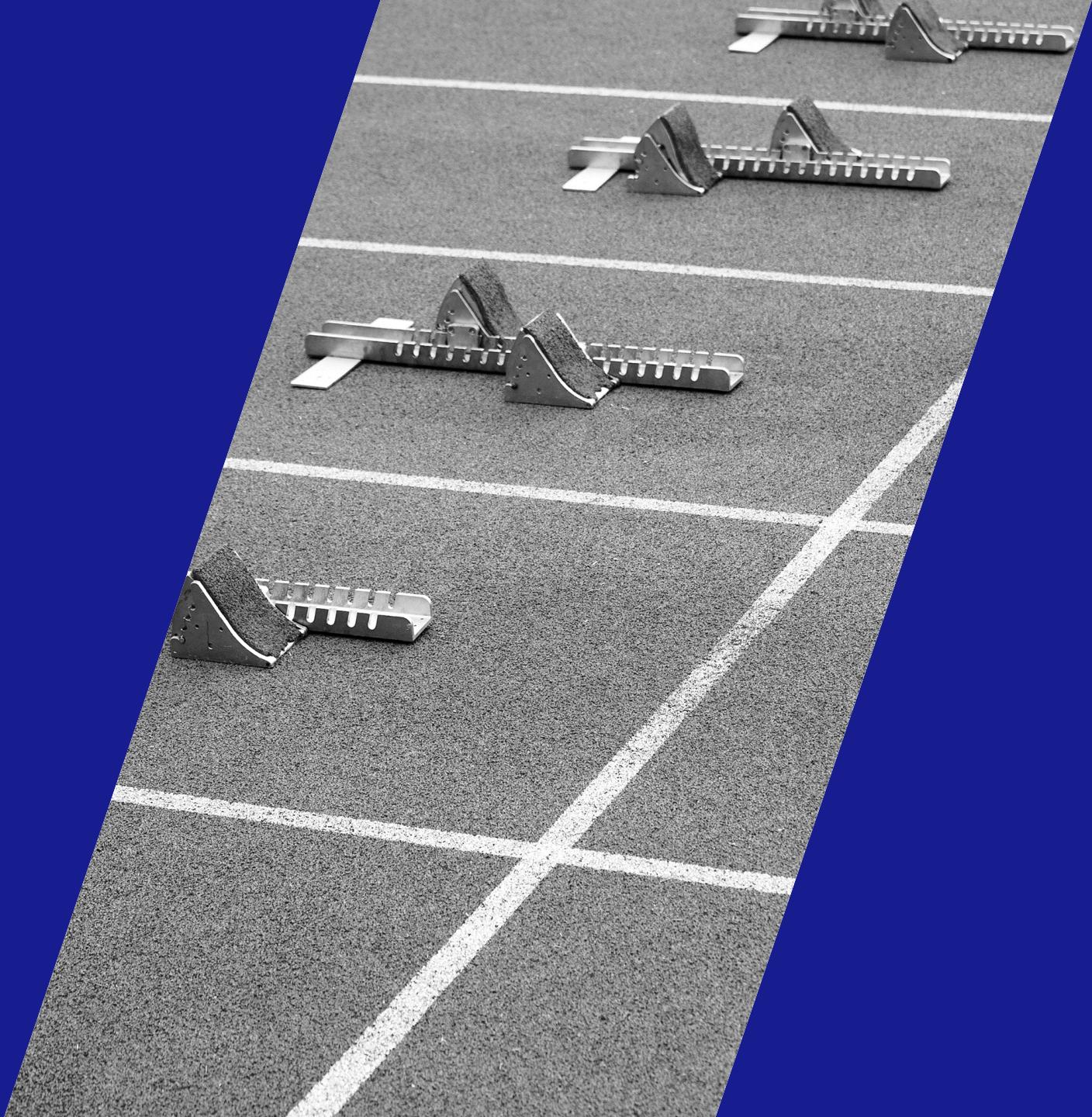
Created a custom web application that was used to ingest the timesheet data and utilized Artificial Intelligence to identify inconsistencies or missing data.

The Benefits

The new process to validate the projects monthly average wage **was reduced from 30 days down to 3 days**.

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

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