



Beyond Integration Unlocking Enterprise Orchestration











June 2026

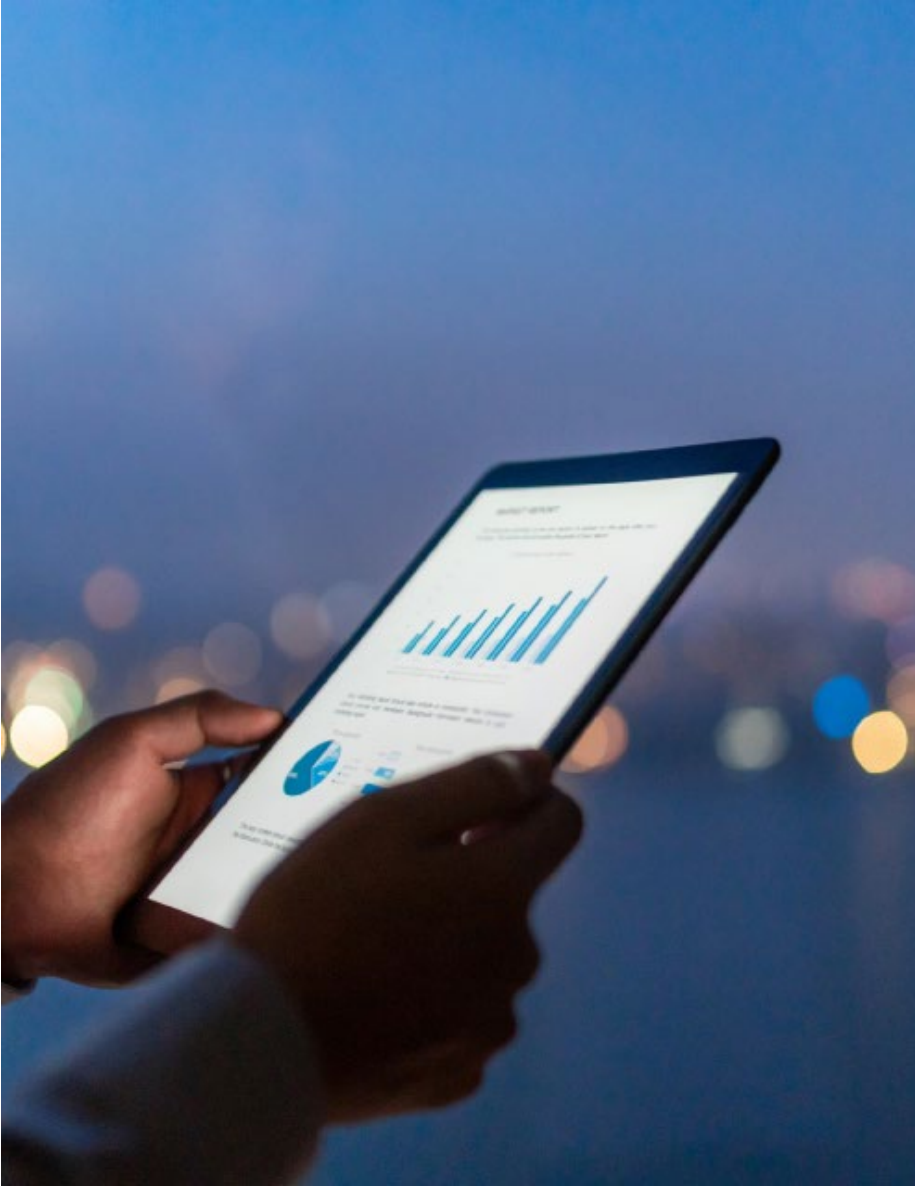
Business Technology Services

We solve for business challenges & support innovation through technology solutions.

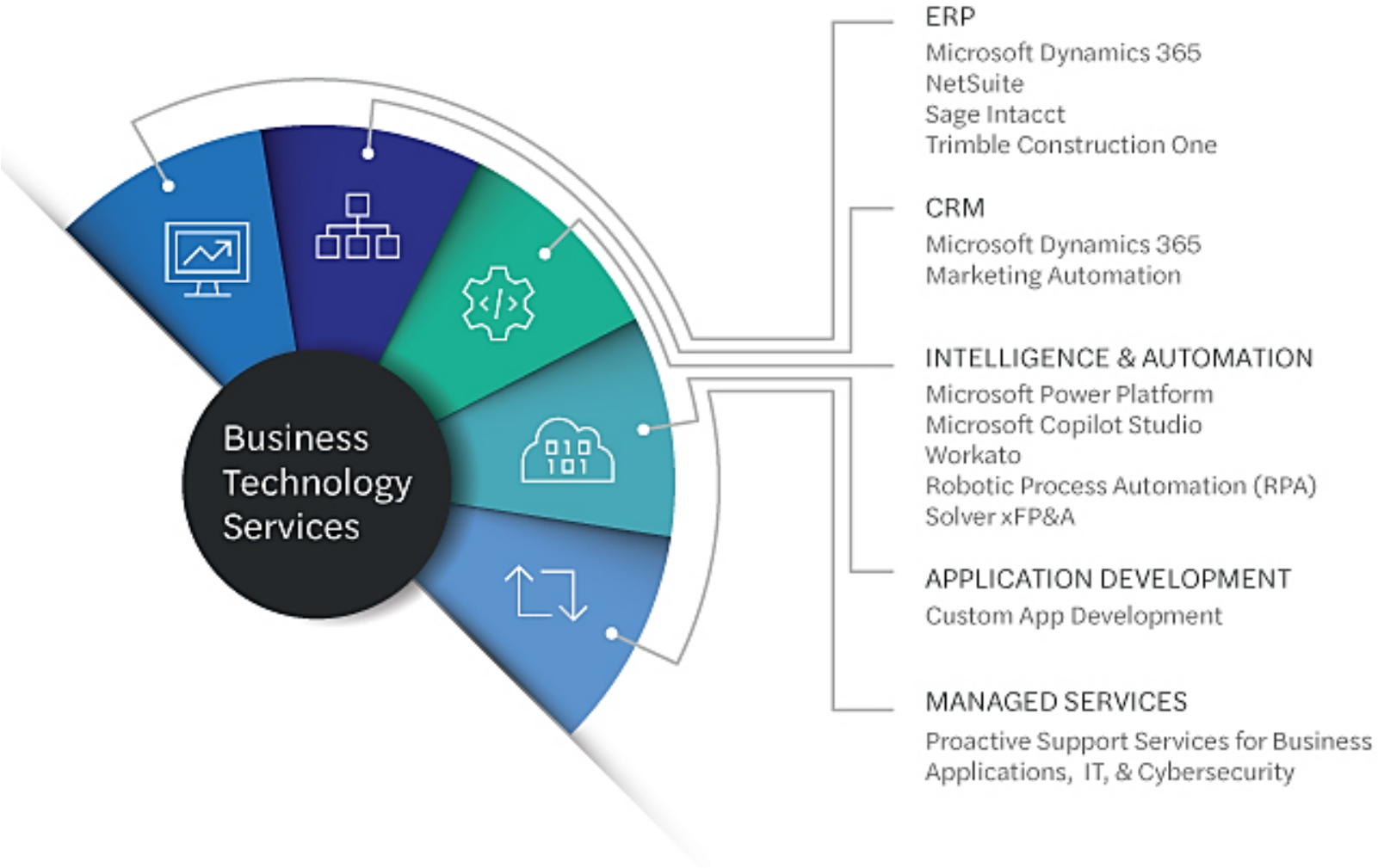
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end technology solutions & managed services help clients achieve their digital transformation goals. Services 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™



Today's Presenters



Ryan Kauzlick

Director
Forvis Mazars



Mike Harrington

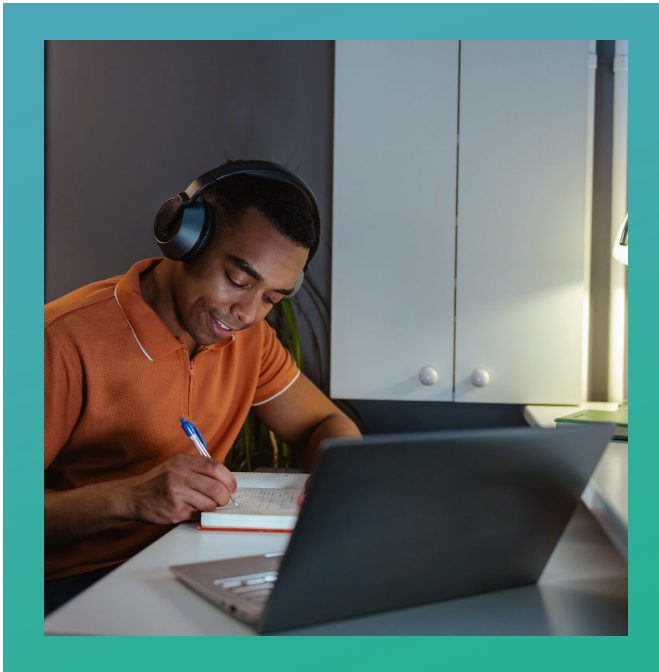
Staff Domain Expert
Workato



Matt Carpenter

Partner Solutions Consultant
Workato

Learning Objectives



01

Discuss how to reduce manual processes & operational bottlenecks

02

Describe ways to enable system-to-system connectivity, even when prebuilt connectors fall short

03

Explain how agentic AI workflows can support orchestration & real-time decision making

Business Challenges & Opportunities

Hidden Costs Behind Automation Gaps

Operational Inefficiencies

Manual processes can slow down operations. Some employees average 3–4 hours on daily tasks that could be automated.

Disconnected Systems

Lack of integrated systems can create bottlenecks & increase errors in business processes.

Real-World Business Impacts

Issues like delayed reporting & duplicate data entry can lead to missed opportunities.

Opportunities for Automation

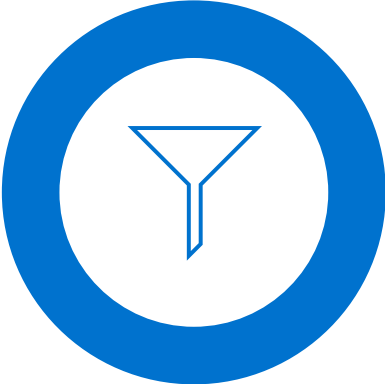
Intelligent automation can help overcome challenges & improve operational efficiency.



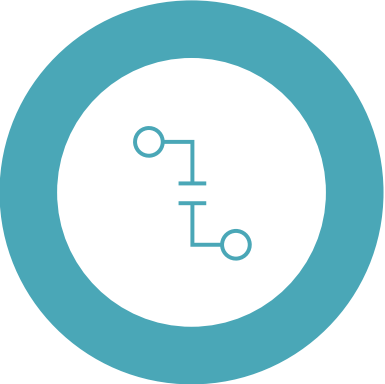
The Case for Automation

Turning Challenges Into Opportunities

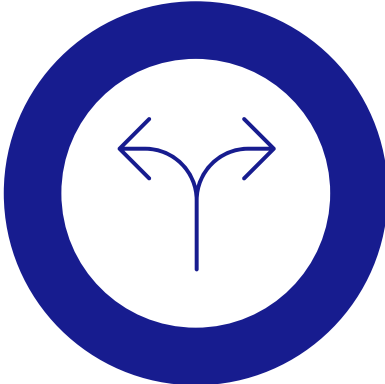
Operational Bottlenecks



Disconnected Systems



Intelligent Decisions

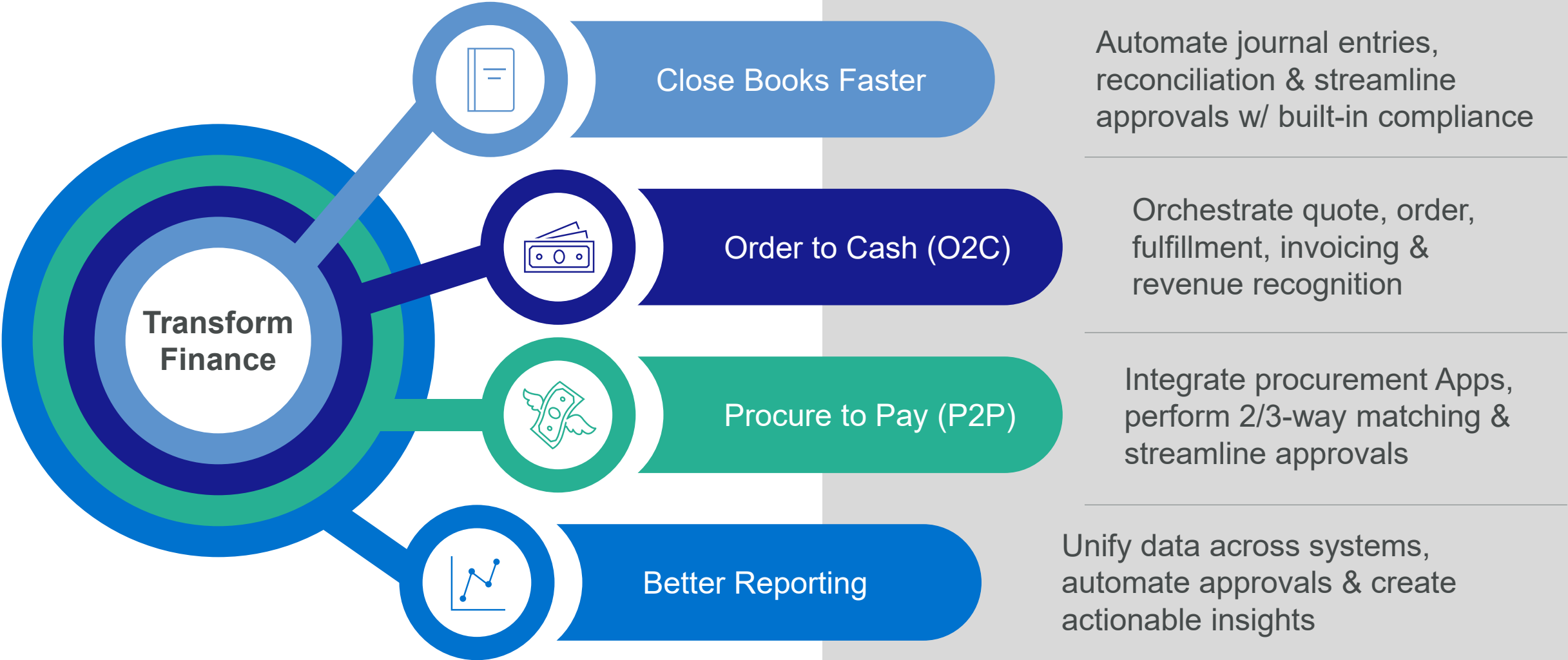


Enterprise Automation

Compliment, Connect, & Make Informed Decisions

CFO 4.0

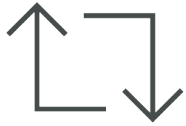
Transform how Finance Operates



Identifying the Right Processes

Key Considerations

Find the Right Process to Automate



Repetitiveness

Processes that involve repetitive tasks.



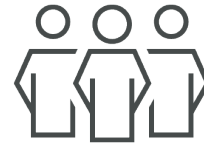
Error Prone

Process is prone to human error.



Volume

Processes that are performed frequently by multiple individuals.



Employee Impact

Process impacts the roles and responsibilities of employees.



Cost Savings

Process has high potential cost savings from automating a process.



Scalability

Process needs to scale as the business grows.

Unlocking the Value of Automation & AI Start Small & Measure Value

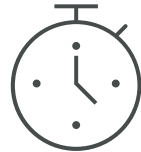
248% Return on investment
over three years*

01



Cost Savings

02



Hours Saved

03



Adoption

04



**Employee
Engagement**

Return on Investment (ROI)

Build Momentum

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

You Have a Toolbox

Use the Right Tool for the Job

Low Code /
No Code

Custom
Development

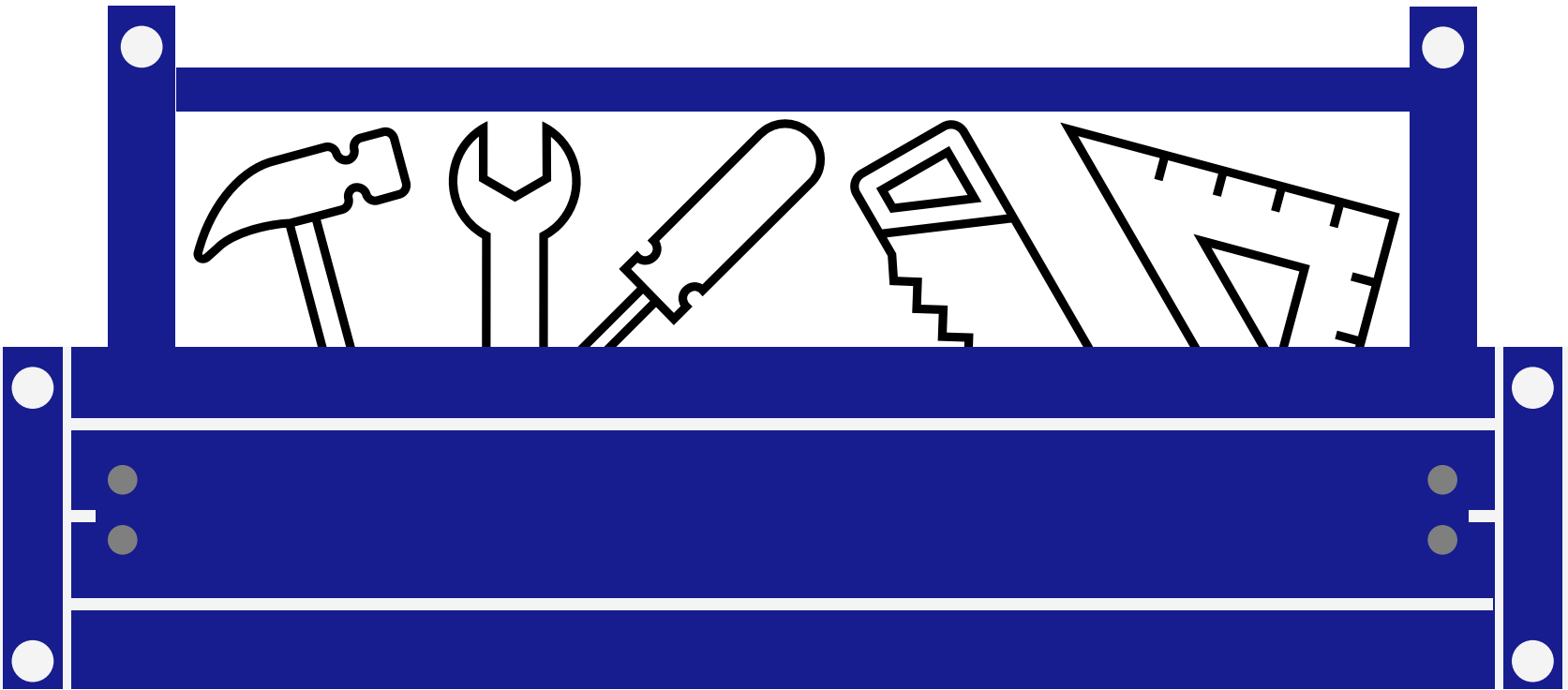
Robotic Process
Automation (RPA)

Machine
Learning (ML)

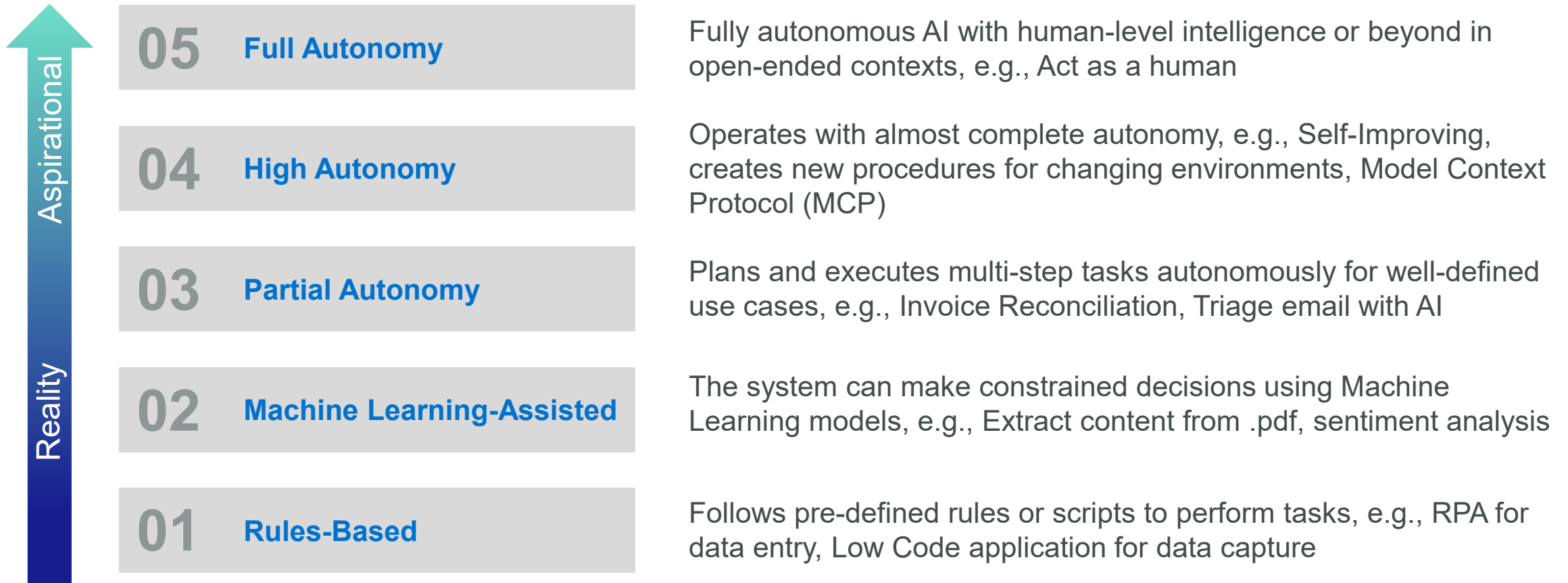
Cloud Platform
Services

Digital Process
Automation (DPA)

Artificial
Intelligence (AI)



Enterprise Automation Levels of Autonomy



NOTE: Level 5 is aspirational in today's world but getting closer to reality

Modern Finance with



For Finance & Accounting Teams

How can our cloud-based platform help you achieve your business outcomes?

Workato at a glance

Founded in 2013

By leaders from TIBCO, Oracle, and Splunk to bring integration, automation, and orchestration together

12,000+ Customers

Direct and embedded customers across 90 countries globally

8,600+ Connectors

Salesforce, Workday, Netsuite, SAP, Jira, Slack, Teams, and more

Leader in iPaaS MQ

8 year Gartner MQ Leader, ranked furthest in Platform Vision & AI

#1 Recommended

Only vendor recognized as Customers Choice from Gartner Peer Insights

FINANCIAL SERVICES



SOFTWARE



TELCO / MEDIA



RETAIL



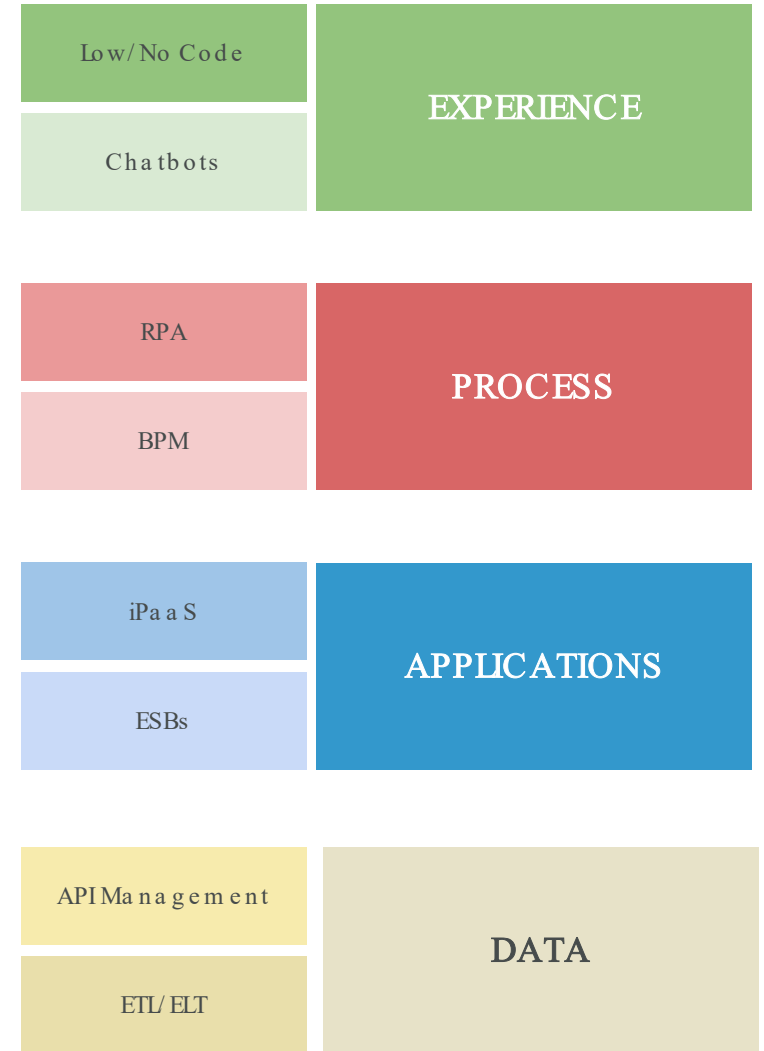
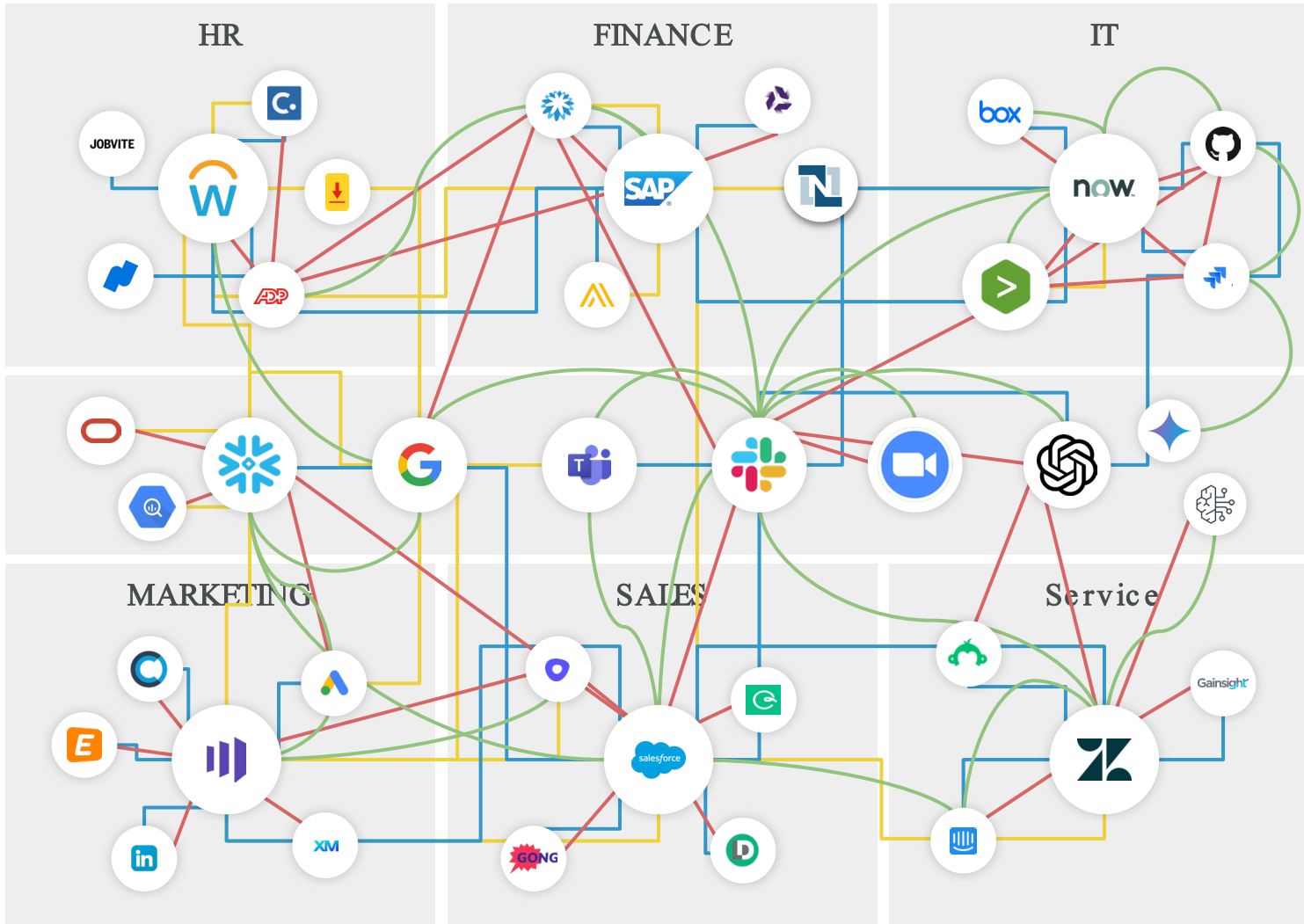
MANUFACTURING / HIGH TECH



HEALTHCARE / PHARMA



Fragmented integration & automation approaches make things worse.



The Fastest Path to Return on AI

Work with Deep Action™

Bring enterprise search, AI, and action together so every employee can discover, automate, and execute in one place.

Agents with Enterprise Trust

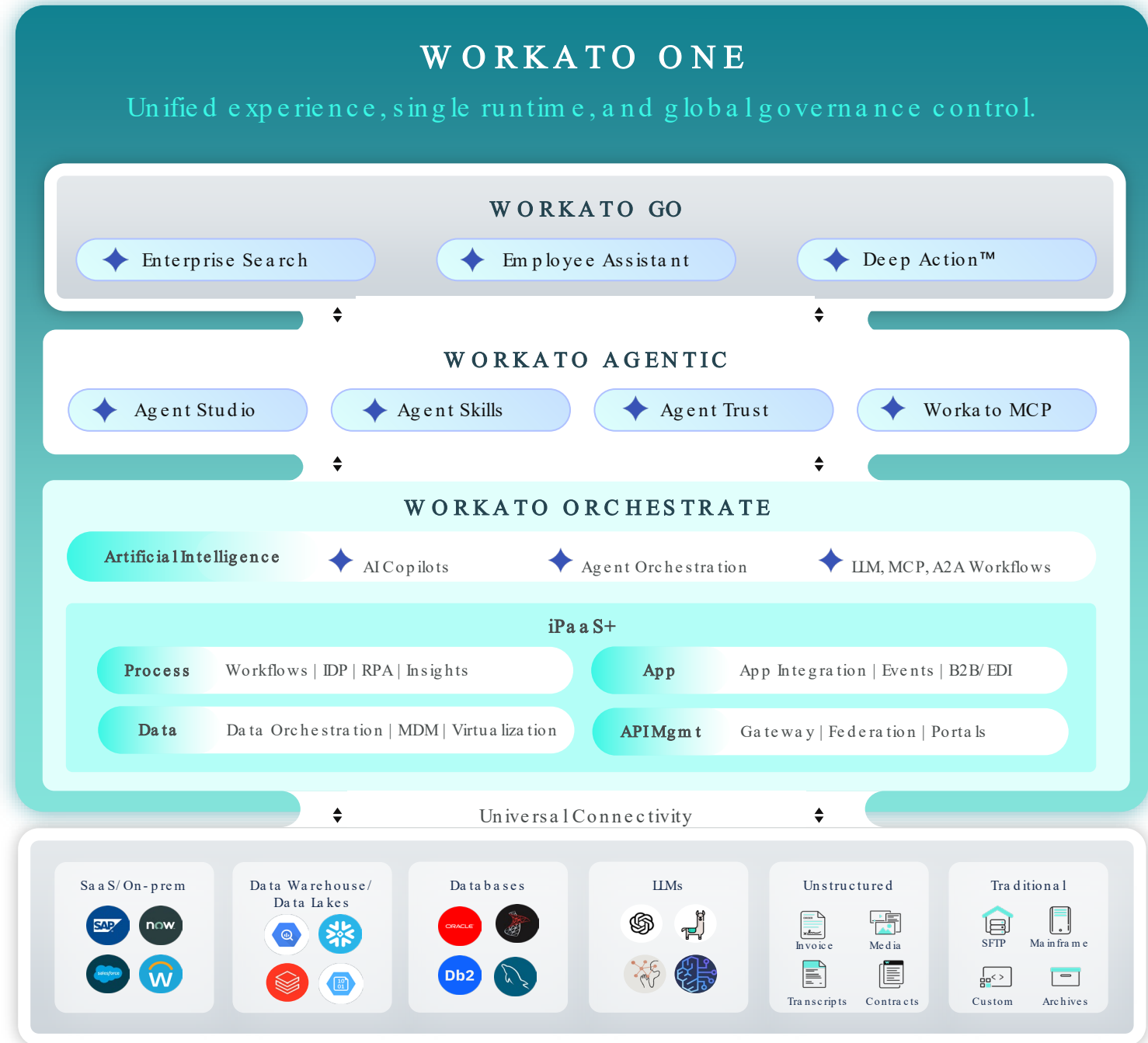
Build and deploy production-ready agents with full context, control, and compliance.

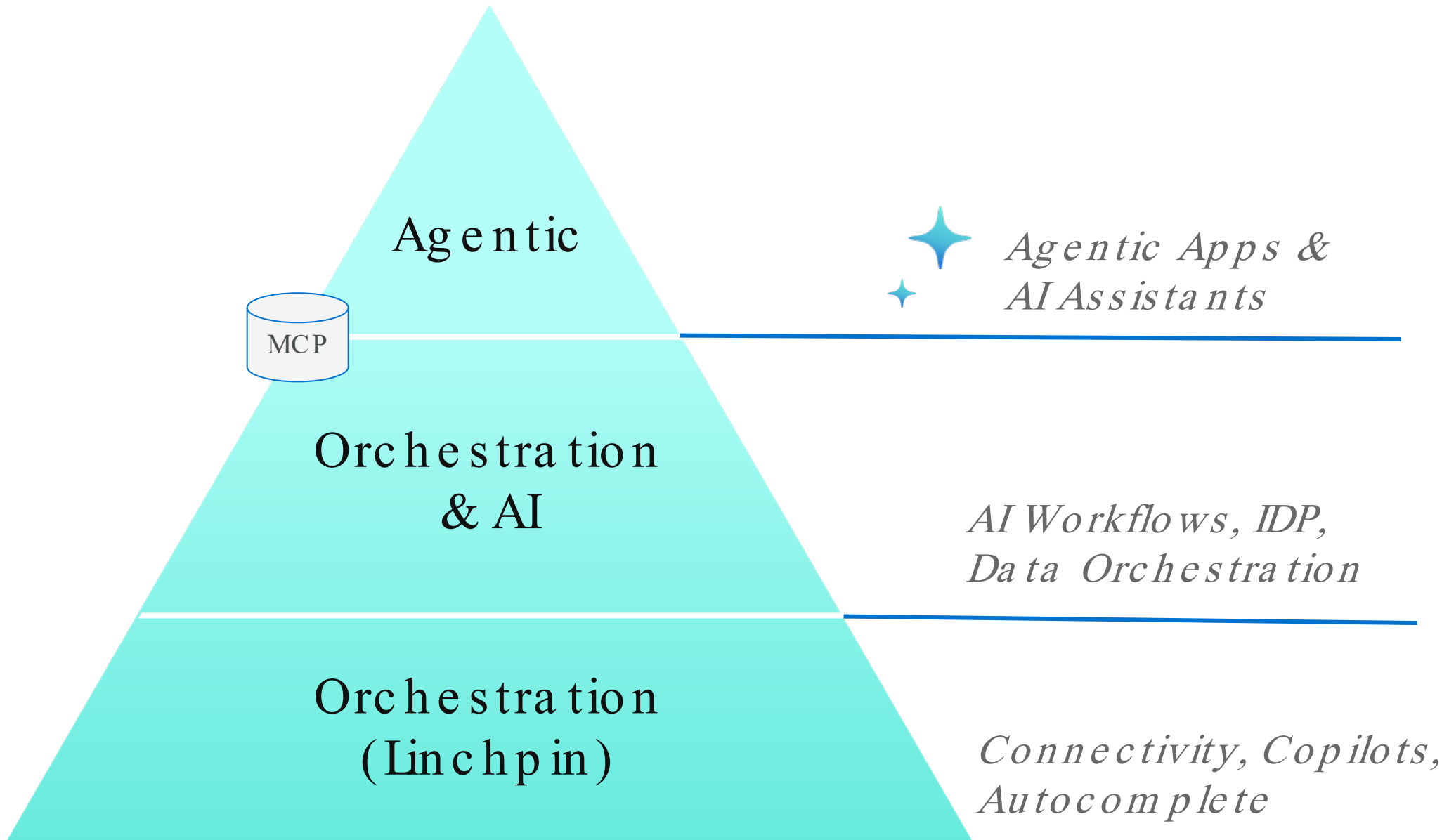
#1 Orchestration Platform

Unify iPaaS, APIM, Data Orchestration, and more on the #1 platform ranked furthest in Vision & AI Enablement by Gartner.

No Ecosystem Lock-In

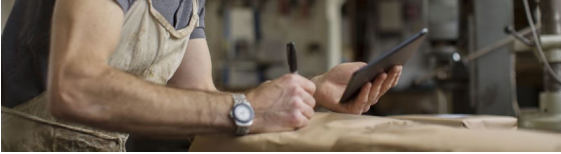
Connect over 10,000 applications and data sources—any format or integration pattern.





Finance Process Inspiration

Art-of-the-Possible Processes



Order-to-Cash



Procure-to-Pay



Record-to-Report



Budget-to-Report



Ideal Enterprise Architecture | Public Company Readiness | Mergers and Acquisitions
 Financials Playbooks | Strategic Long-Range Corporate IT Planning | Enterprise Approval
 Process Sprawl | **B2C Order-to-Cash** | Continuously Improving Sarbanes-Oxley Plan |
 Global Payroll Expansion | **Finance AI Use Cases** | Efficient Business User Acceptance
 Testing | Global Tax Solutions | **Technical Debt Reduction** | Transformation focused on
 Improving Data Quality | **Integration Sprawl** | Cash Management

Use Cases for Public Sector



Constituent Services Genie

Agencies field thousands of requests (permits, benefits, utility) via siloed systems.

A Genie connected to CRM and case management allows staff or residents to ask status questions in natural language, eliminating hold times.



Budget & Procurement Genie

Finance teams manage complex fund structures across ERPs.

Genie lets analysts ask about balances or expiring contracts on demand, while proactively surfacing budget variances and audit risks.



Infrastructure & Fleet Genie

Transportation and public works manage vast inventories with complex compliance.

A Genie connected to Fleetio or AssetWorks answers real-time maintenance queries and triggers automated work orders.

Infrastructure & Fleet Genie — How It Works



1. CONNECT

Link fleet and asset systems like Fleetio, AssetWorks, ServiceNow, and SAP.



2. ASK

Staff ask natural language questions about inspections or maintenance status.



3. AUTOMATE

Workato triggers work orders, alerts, and reports automatically.



4. GOVERN

Role-based access ensures the right people see the right assets securely.

Use Cases for Non-Profits



Donor Intelligence Genie

Natural language queries against your CRM to surface lapsed donors, major gift prospects, and trends—without needing to pull a report. Ask "Who are our top 50 donors who haven't given in 18 months?" and get an actionable list in seconds.



Grant Management & Compliance

Connected to finance (NetSuite, QuickBooks) + CRM to alert on deadlines, flag budget variances, and pre-populate reports—dramatically reducing the compliance risk from grant mismanagement.



Asset & Inventory Tracking Genie

Provides real-time visibility into donated equipment and supplies. Ask "Which participants still have unreturned laptops?" and get instant answers. Closes the loop between intake, valuation, and 990 reporting.

Donor Intelligence Genie — How It Works



1. CONNECT

Link your CRM and fundraising systems (Salesforce NPSP, Bloomerang, Raiser's Edge, or similar).



2. ASK

Fundraising staff ask natural language questions ("Who are our top 50 donors who haven't given in 18 months?").



3. SURFACE

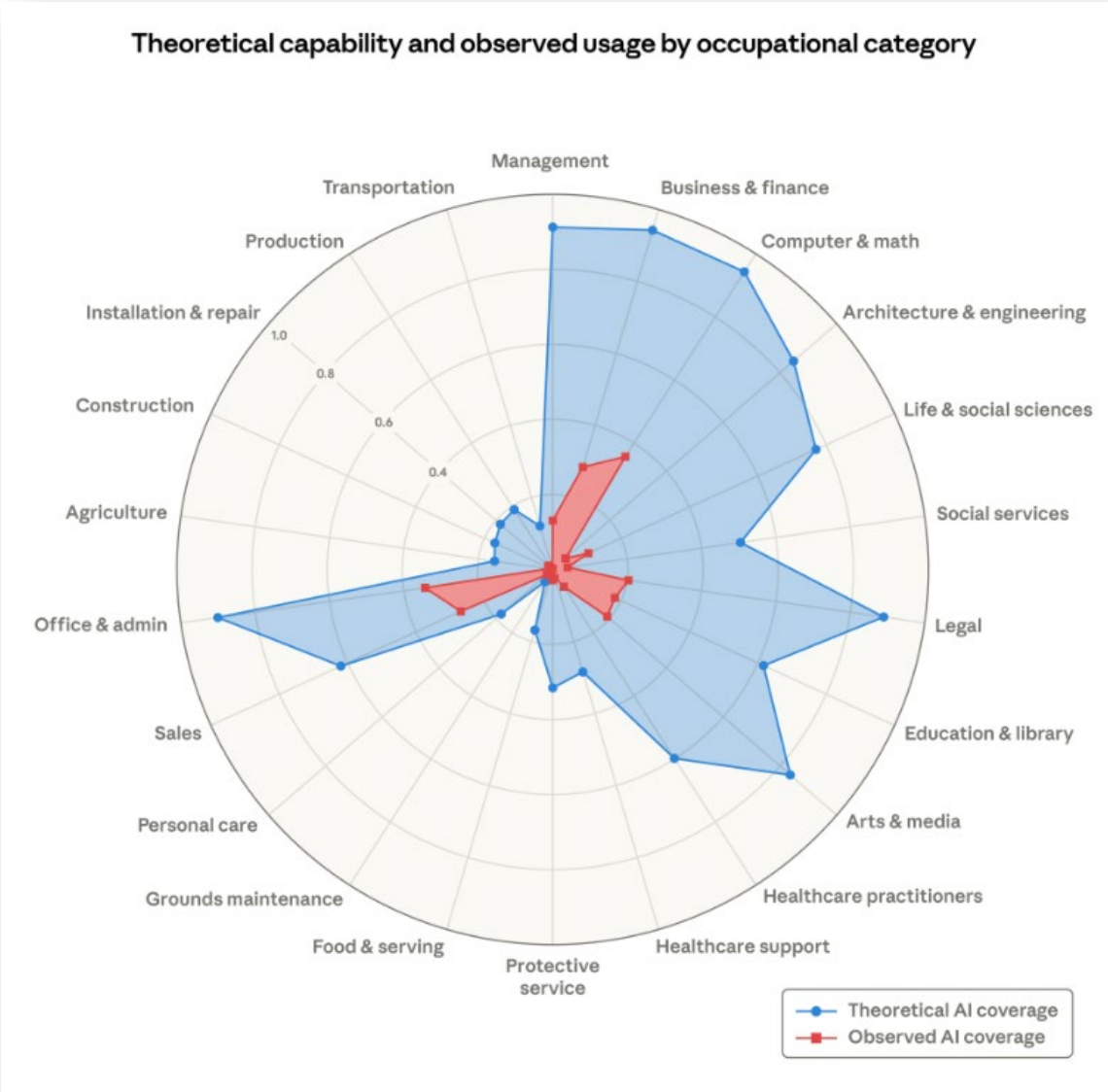
Workato returns ranked donor lists, giving trends, campaign performance, and lapse risk scores instantly.



4. ACT

Automatically trigger outreach tasks, stewardship workflows, or major gift alerts in your CRM.

Theoretical Capability and Observed Usage by Occupational Category



Potential AI Impact

“We find that computer programmers, customer service representatives, and financial analysts are among the most exposed.”

The finance function is under pressure to do more with less — what's the #1 process you're seeing finance teams automate first, and why does it tend to be the entry point?

How can finance teams rapidly implement Workato solutions to streamline integration and automation without lengthy IT timelines?

Everyone's talking about AI agents in finance — but there's a big gap between a pilot and production. What does Workato see as the biggest obstacle finance teams face when trying to scale agentic AI beyond a proof of concept?

Question 4

We hear all the time that month-end close is still painful for most organizations. Paint me a picture of what a truly automated close process might look like in practice — and what's realistic to expect in year one?

We hear automation is the new thing because it will make things faster. However, finance leaders can't afford errors in the ledger. How does Workato think about governance and auditability in automated financial workflows?

Key Takeaways



Reduce Manual Processes

Reducing manual tasks decreases bottlenecks & increases efficiency in workflows.



Connect Systems Seamlessly

Integrating diverse systems enables smooth data flow & operational continuity.



Scale Automation With AI

Using low-code & AI tools like Workato can enable scalable, intelligent automation to support business growth.



Call to Action

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

Q&A



Business
Technology
Services

Questions?

Contact

Forvis Mazars



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