

A collection of vintage tin robots and tools on a workbench. The robots are made of metal and have various colored eyes and antennae. They are surrounded by tools like screwdrivers and a wrench. The background is a dark, textured surface.

LSL 

WEBINAR

Exploring New Frontiers in Intelligent Technologies for Local Governments

1 CPE CREDIT AVAILABLE

Wed, Oct 25
11:00AM PST

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Your Presenter

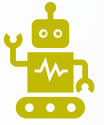


Gail Gray, CPA
Partner
LSL Technology Consulting

Agenda



New Tools & Technology



Overview of RPA



An Automation Journey



RPA Automations In Action



Q&A

Generative AI:



ChatGPT



Bing Chatbot



Microsoft Copilot



Google Bard

Let's look at ChatGPT

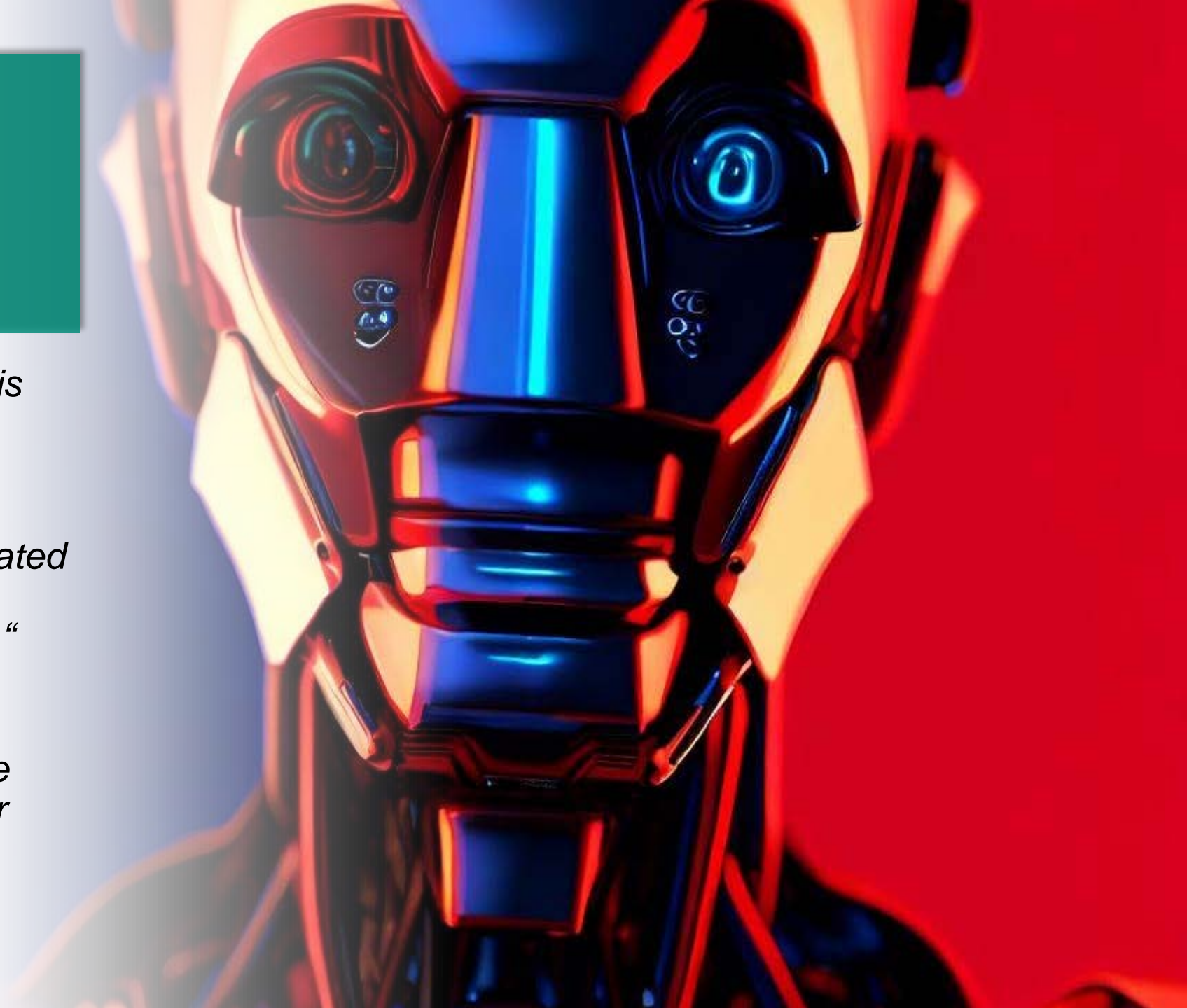
1. ChatGPT: Advanced conversational AI developed by OpenAI.
2. Uses deep learning and natural language processing to generate human-like responses.
3. Trained on diverse internet text for informative and creative conversations.

ChatGPT: The Next Disrupters

"AI-powered chatbots like this will make human interaction obsolete."

"ChatGPT is just a sophisticated parrot, lacking true understanding and empathy."

"I worry about the ethical implications of AI models like this being used to deceive or manipulate people."



Email – 1980's –

"Email is impersonal and lacks the personal touch of traditional letters or phone calls."

"It will lead to information overload and reduce productivity."

"Email is not secure, and sensitive information could easily be intercepted."

WWW- 1991- World Wide Web-

"The web is just a fad, it won't replace traditional sources of information."

"It's too complicated for the average person to use effectively."

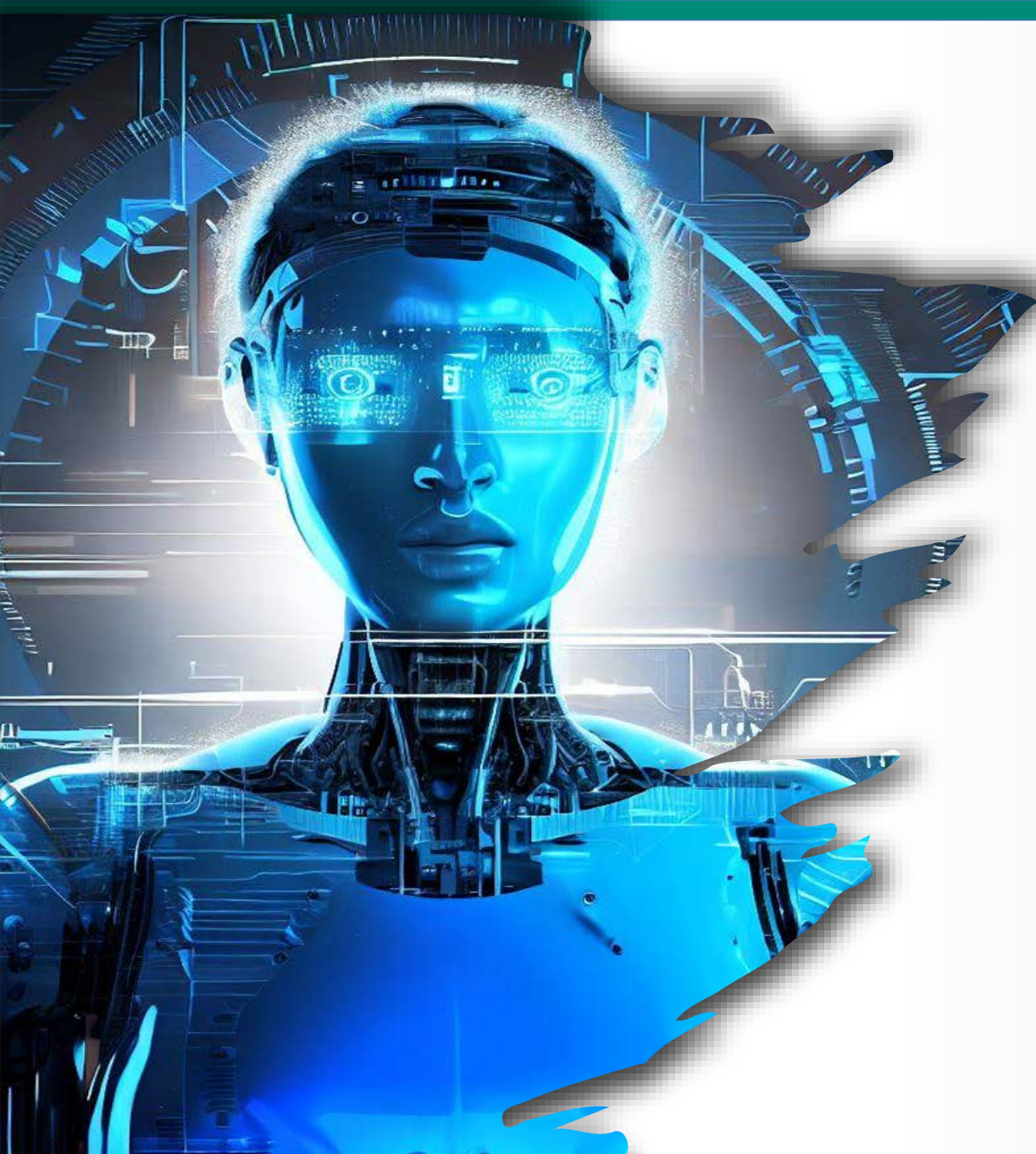
"The web will make us more disconnected from the real world and each other."

Let's look at this in action:

<https://chat.openai.com/>

What is Microsoft Copilot?

- It combines large language models with your data to enhance productivity.
- Copilot is integrated into Microsoft 365 apps to unleash creativity and unlock productivity.
- Available Nov 1st!!! [Microsoft – Watch the September 21 event](#)
www.Microsoft.com/en-us/event
- Copilot also has a new experience called BingChat in Microsoft Edge





- **Bing AI-powered Search**

- Follow up questions/prompts
- Have chatbot summarize and cite the results into conversational answers
- Ask the chatbot to reformat the answer in a specific way for your usage

- **Bing AI-powered Image Creator**

- Search, chat, and create images in the chat box

- **AI-Powered Copilot for Microsoft 365 apps and services**

- Embedded in-app chatbot assistant
- Generate office files or content for files
- Ask the chatbot to engage program features for you like pivot tables in Excel (*In case you hate using Pivot Tables yourself*)
- Remember Clippy? Like that but better! (*If you miss Clippy, it is being resurrected as an emoji for Office 365 products*)

Microsoft AI Chat



8:40 PM Wed Jun 21

Can you explain Microsoft Copilot in 3 bullet points

for the team or as slides in a presentation. You can give it natural language prompts like "Did anything happen yesterday with [customer X]?" and it will create relevant, accurate responses based on your business' data ^{Ad 1}.

Is there anything else you would like to know?

Learn more: 3 of 30 ●

1. theverge.com 2. blogs.microsoft.com 3. computerworld.com 4. smartcompany.com.au

How do I access Business Chat?

✓ Searching for: **How to access Microsoft Copilot Business Chat**

✓ Generating answers for you...

You can access Business Chat from Microsoft365.com, Bing when signed in with a work account, or via Microsoft Teams ¹. Is there anything else you would like to know?

Learn more: 4 of 30 ●

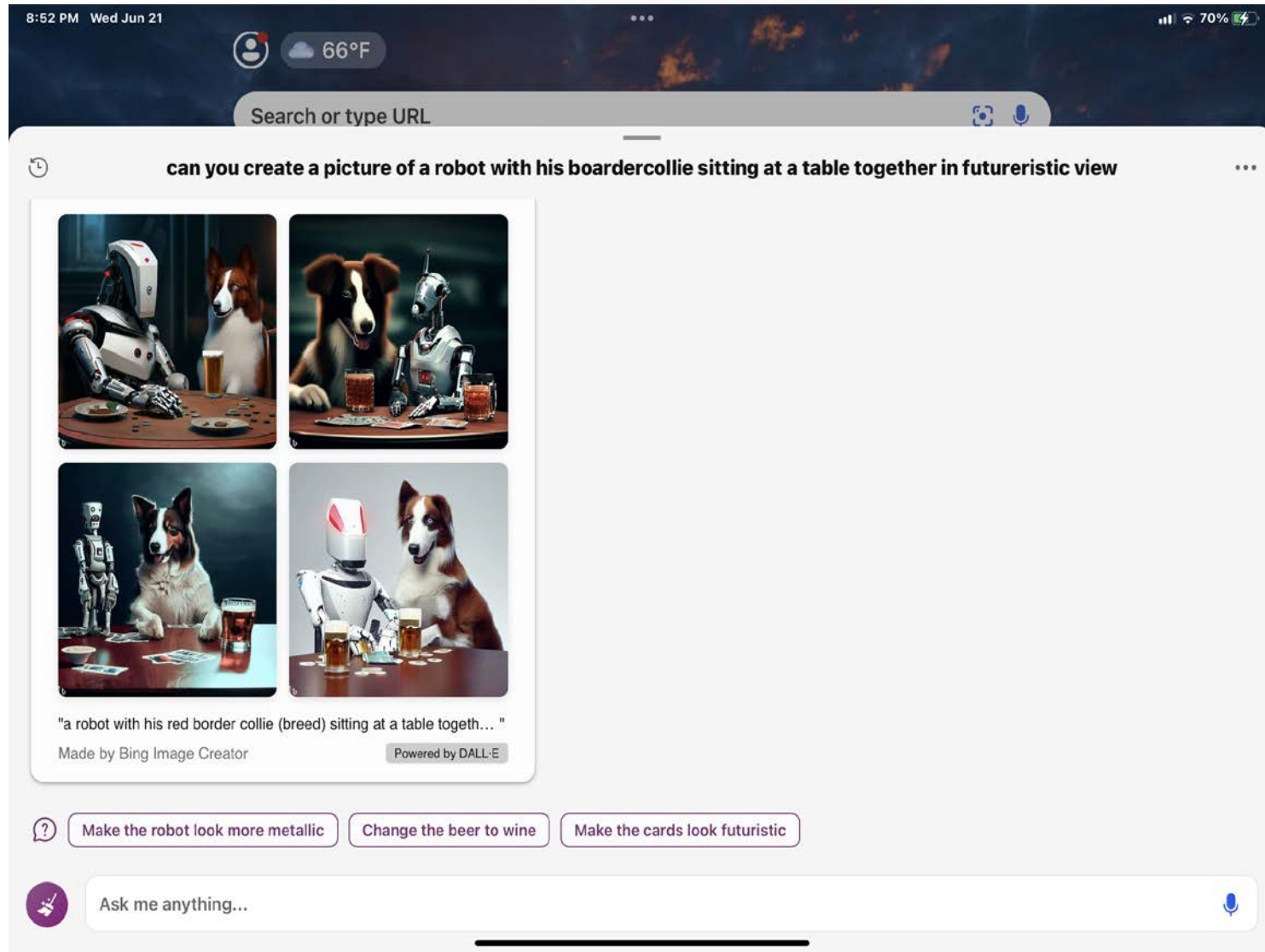
1. pureinfotech.com 2. blogs.microsoft.com 3. microsoft.com 4. answers.microsoft.com
5. microsoft.com 6. timesofindia.indiatimes.com

How does Business Chat work? What are some examples of how Business Chat can help me? How do I use Business Chat in Microsoft Teams?

Ask me anything...

Microsoft AI Chat Creative

Powered
by DALL-E



8:52 PM Wed Jun 21 66°F Search or type URL

can you create a picture of a robot with his bordercollie sitting at a table together in futureristic view

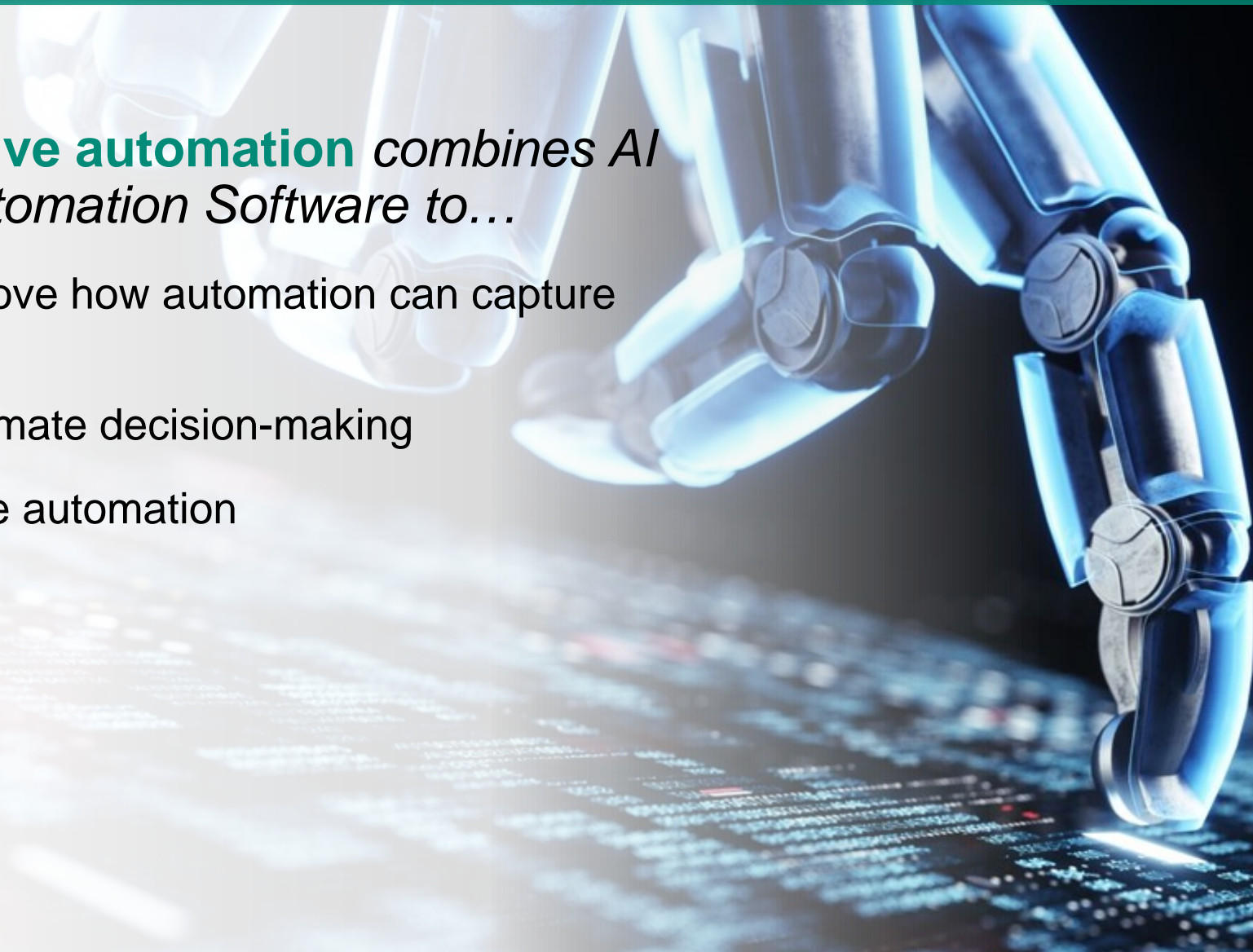
"a robot with his red border collie (breed) sitting at a table togeth..."
Made by Bing Image Creator Powered by DALL-E

? Make the robot look more metallic Change the beer to wine Make the cards look futuristic

Ask me anything...

New developments in Automation

- **Cognitive automation** *combines AI and Automation Software to...*
 - Improve how automation can capture data
 - Automate decision-making
 - Scale automation



Different tools in your tool belt



Robotic Process Automation (RPA)



Machine learning & AI



Document understanding



Generative pre-trained transformer (GPT)
(like ChatGPT & DALL-E)



Microsoft Power Suite
(like Power BI & Power Automate)

Before You Start With AI:

- **Research AI & Finance Applications**
 - *Examine your own workflows and processes for similar opportunities*
- **AI is not the solution for every problem!**
- **Bad Data in = Bad Data Out**
 - *Prioritize data literacy with your team*
 - *Seek to understand your own data*
 - *Clean, consolidate, and organize your data and sources*
- **Start with small AI projects and increase complexity in line with your team's understanding**
 - *Consider consultants to bridge the gap.*

*Embrace the concept of “**Digital Evolution**” by viewing AI implementation as an ongoing process, acknowledging the ever-evolving nature of technology.*

Overview of RPA



Let's look deeper into RPA.

*Robotic **P**rocess **A**utomation*

RPA is:




- Computer-coded software that can Automate tasks that are:
 - Repetitive
 - Rules-based
 - Structured tasks

RPA is designed to...




- Work with existing systems and applications
- Login to websites and software
- Scrape data
- Update spreadsheets
- Enter data
- Work with digital data

Dispelling Myths about RPA

RPA IS...

-  Computer-coded software
-  Programs that significantly reduce manual effort, when performing repetitive rules-based tasks
-  Cross-functional and cross-application macros

RPA IS NOT...

-  Walking, talking auto-bots
-  Physically existing machines processing paper
-  Artificial intelligence or voice recognition and reply software

WHAT RPA CAN DO

- 
- Open email and attachments
 - Log into web/enterprise applications
 - Read and write to databases
 - Move files and folders
 - Copy and paste
 - Scrape data from the web
 - Extract structured data from documents
 - Follow "if/then" decisions/rules
 - Collect social media statistics
 - Connect to system APIs

Automation Opportunities

Sales

- Deal Configuration
- Campaign Execution
- Sales Cycle Management
- Proposal Creation
- Quote Management
- Order Processing

Marketing

- Social Media Reporting
- Campaign Management
- Lead Generation
- Follow-up Emails
- Website Pricing Checks

Human Resources

- Workforce Planning
- Commissions Payout
- Internal Promotions
- Employee Onboarding
- Employee Termination
- Severance Packages

Operations

- Create New Account
- Close Account
- Adjust Account
- Transfer Account
- Automate Reports
- Follow-up Emails

Procurement

- Forecasting
- Vendor Setup/ Maintenance
- Contract Creation
- Vendor Quote Solicitation
- Purchase Order Creation
- Vendor Shipment Optimization

Logistics

- Product Shipment Optimization
- Shipping Cost Comparison
- Freight Claims & Payments
- Order Processing

Accounting

- Balance Sheet Reconciliation
- Complex Accounting Spreadsheets
- Financial Reporting
- Forecasting and Budget Consolidation
- Journal Entry

Technology

- Computer Assignment
- Email ID Creation
- Grant/Cancel System Access
- Testing System Changes
- Equipment/App Inventory

How to start your Automation Journey



Problems Identified

- Manual entry, repetition, errors
- Staff shortage
- Late filing fees
- Time-consuming tasks
- Unsure how RPA functions

“We know RPA can help, but we don’t know where to start.”



It's A Journey!

Education

- Train the team on Automation, Process Improvement, and RPA specifically.



Identification

- Look at painful processes and use new knowledge to identify good candidates.



Conversation

- Analyze candidates for process improvement and ROI.



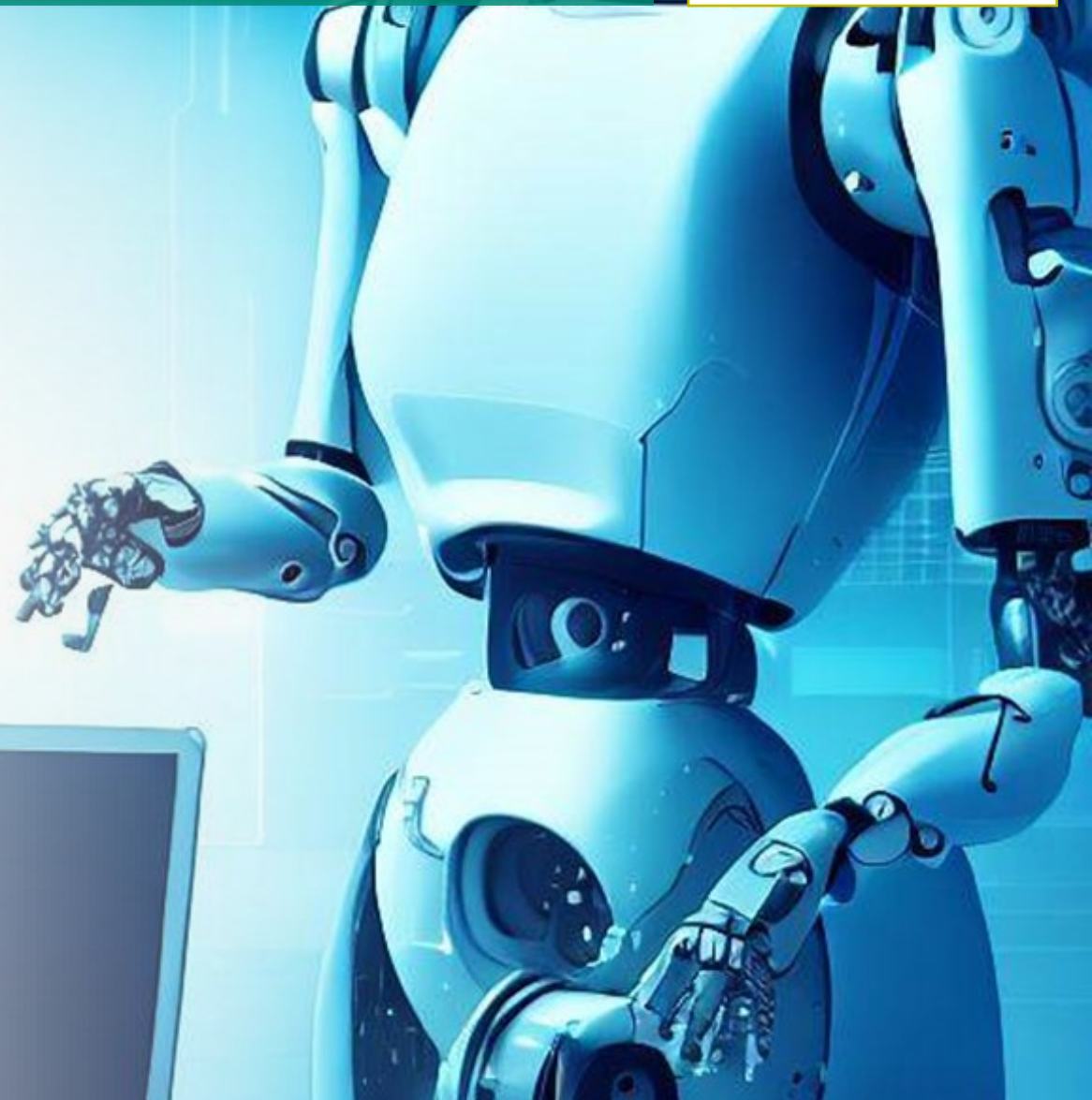
Automation

- Implement improvements, solutions, and best practices.



Challenges faced:

- Starting point undetermined
- Process not fully digital
- Process not stable
- Process to be modernized first
- Understanding of cost
- IT requirements undetermined



Automations in Action



First Automation: Monthly Sales Tax Reporting

Video Demonstration



Second Automation: Daily Cash Reconciliation

Video Demonstration



“Our automation journey has been successful in reducing manual efforts, increasing efficiency, and minimizing errors.

These are critical steps toward achieving operational excellence.

We encourage all organizations to embark on their automation journey and reap the benefits of automation.”

*Charles Lino, City Manager
Town of Pecos City, TX*



Gail Gray, CPA

Technology Partner at LSL CPAs

<https://lslcpas.com/rpa-governments/>

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