

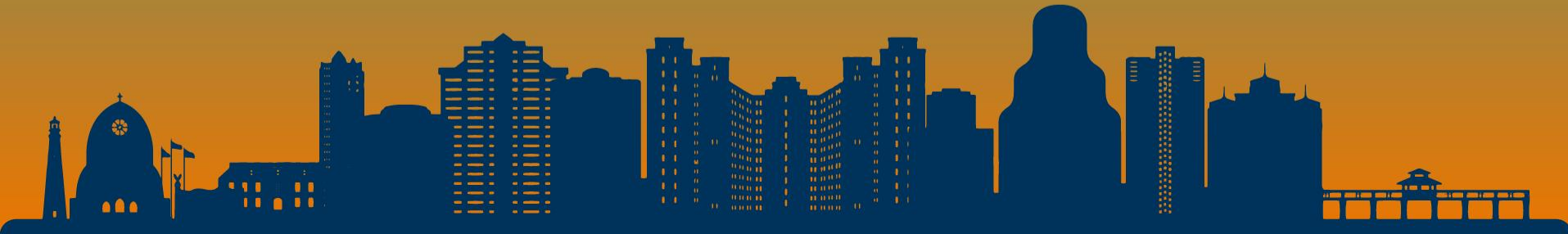
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# **DIGITAL TRANSFORMATION SERVICES**

## FOR LEA FIRMS & THEIR CLIENTS



# Digital Transformation Services



- Data Engineering
- Data Visualization
- **Intelligent Automation (RPA)**

# • Digital Transformation Services

Data Engineering | Data Visualization | Intelligent Automation (RPA)



## Data Engineering

Extract data from one or more data sources and transfer that data into another system, or, into a centralized data warehouse.



### Example Use Cases:

- Pull transaction data from your point-of-sale system and ingest it into your accounting system
- Consolidate financial data from multiple subsidiaries into a centralized general ledger report
- Move historical data from an outgoing legacy system into a newly implemented system
- Aggregate data from your email, marketing, and billing systems into your CRM platform

### Benefits:

- Aggregate key data sets from disparate systems for more in-depth analysis and reporting
- Fully decommission deprecated systems while retaining important historical reference data
- Receive critical operational data more quickly by removing manual data entry and extraction steps

# • Digital Transformation Services

Data Engineering | Data Visualization | Intelligent Automation (RPA)



## Data Visualization

Data pipelines aggregate data into a central repository where it is transformed, organized, and visualized in a business intelligence dashboard.

These dashboards include charts, graphs, tables, and other visuals to represent key performance indicators (KPI's) or other metrics that are important to the business.

## Example Use Cases:

- Provide executives with personalized dashboards showing revenue projections, outstanding A/R, firm performance, etc.
- Consolidate data from different business units into a centralized financial analysis dashboard
- Report on larger data sets that would be too cumbersome to handle in Excel

## Sample Consolidated Financial Analysis Dashboard:



# • Digital Transformation Services

Data Engineering | Data Visualization | Intelligent Automation (RPA)



## Intelligent Automation (RPA)



Think of intelligent automation like adding a digital worker or, team of workers, to your team. Intelligent automation is centered around robotic process automation (RPA) which automates tasks that would normally be done manually (i.e. data entry, downloading reports, and processing invoices)

Bennett Thrasher has partnered with UiPath which is a leading RPA platform provider.



## Example Use Cases:

- Automate your invoice processing workflow with a bot that logs into your order processing system, reads the invoice, processes the order, and then posts the entry in your accounting system
- Take mundane, repetitive data entry tasks away from your staff so they can focus on more complex work
- Automate your charge entry process with a bot that reads charges from one system and posts them in another

## Benefits:

- Improve staff morale by allowing them to focus on more engaging tasks
- Extend the life of a legacy application and avoid going through a lengthy and complicated new system implementation
- Reduce error rates that come with keying data by hand

# Automation Use Case

## Error, Correct, and Repost (“ECR”) Processing

### THE CHALLENGE

Billing staff manually reviewed tens of thousands of charges each week to identify errors and then repost those charges for reimbursement. This required accessing multiple data sources, logging into the hospital’s billing application to validate the transaction details, and then perform the reposting.

### OUR APPROACH

Our digital transformation team documented each step of the workflow, accounted for caveats, and developed a detailed understanding of the process. The team determined that leveraging robotic process automation (“RPA”) to automate these tasks would be the best approach.



## THE RESULTS



**98.5%**

Success Rate



**>\$5M**

Processed  
per Week



**30 sec.**

Processing Time  
per Item

- Between 5,000 and 30,000 transactions processed per week
- Billing staff can be re-purposed to other, more complex tasks
- Total processing time reduced to hours or days
- Audit logs are generated when each transaction is processed

# Automation Use Case

## Insurance Coverage Status Update Automation

### THE CHALLENGE

Validating the insurance status of patients by manually checking multiple insurance databases and contacting providers. The laborious process made recovering the appropriate billings for patients tedious and cumbersome work that took weeks to complete.

### OUR APPROACH

Our digital transformation team sat down with the processes' key stakeholders and developed a detailed understanding of the process. The team then framed out a solution using UiPath to automatically search insurance databases, return matching record results, and update records in the organization's billing system automatically.

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## THE RESULTS



**\$200K**

Billed to  
Insurance



**5,300+**

Visit Records  
Processed



**15 sec.**

Processing Time  
per Item

- Additional insurance billings are captured in a matter of hours
- Billing staff can be re-purposed to other, more complex tasks
- Billing reports are updated with more accurate patient details
- Implemented quickly with minimal disruption to operations

# Examples of Intelligent Automation projects at Bennett Thrasher and other CPA firms

- Engagement letter confirmation and routing
- Removing rote process for practices
- Automating bill payment
- Confirming receipt of client documentation (future)

# Key Industries for Firms to Target



- Professional Services (accounting, law, consulting)
- Healthcare
- Construction
- Real Estate
- Insurance & Banking
- Other Mature Industries (i.e., not technology companies)

# How we can partner/collaborate with LEA firms



- Referral
- Co-delivery
- White-label



**THANK YOU**

