Harnessing Technology: Insights for Next-Gen Organizations

Artificial Intelligence, Automation, & Data Analytics

October 2025

Today’s Topic

Artificial intelligence and automation are reshaping how professional services firms deliver value. As technology accelerates, firms that align innovation with strategy—not experimentation—will lead the next era of growth. Drawing on three decades of experience guiding transformation across global networks and now leading digital innovation at CBIZ Inc., Rob McGillen shares practical approaches to help firms modernize responsibly, unlock productivity, and reimagine client engagement through AI, data, and automation.

Key Take Aways from Today’s session:

1. Understand strategic applications of artificial intelligence and better practices of AI
2. Gain insights into digital automation of traditional business processes
3. Learn how data analytics drives better insights and operational efficiency
4. Taking the next steps in digital modernization

Introducing Today's Speaker

Rob McGillen – Vice President, Business Innovation, CBIZ Inc.

Digital Transformation Leader | Global CIO | Technology Founder

Rob McGillen is a digital transformation leader, global CIO, and technology startup founder with three decades of experience helping organizations modernize and capture value through technology-infused strategies that accelerate growth.

As the former Global Head of Technology at Grant Thornton, he led digital transformation initiatives across 80+ countries, guiding partners and professionals to adopt platforms that enabled consistent, scalable operations worldwide.

Today, as Vice President of Business Innovation at CBIZ Inc., Rob empowers more than 10,000 employees to leverage digital products and AI-driven tools serving over 150,000 clients annually. His hands-on experience in AI, automation, and data analytics helps companies translate innovation into measurable business outcomes.

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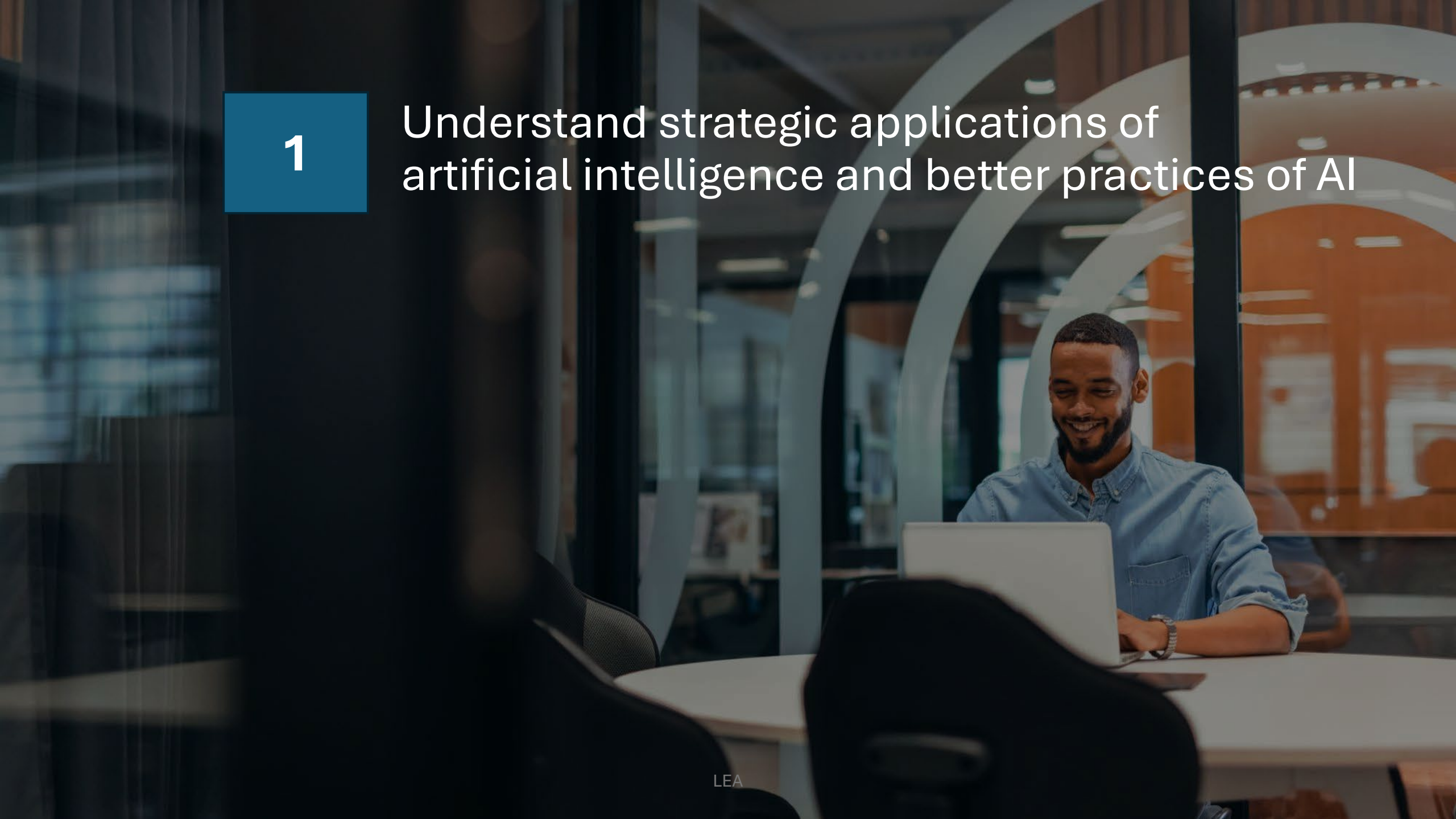


1 Understand strategic applications of artificial intelligence and better practices of AI

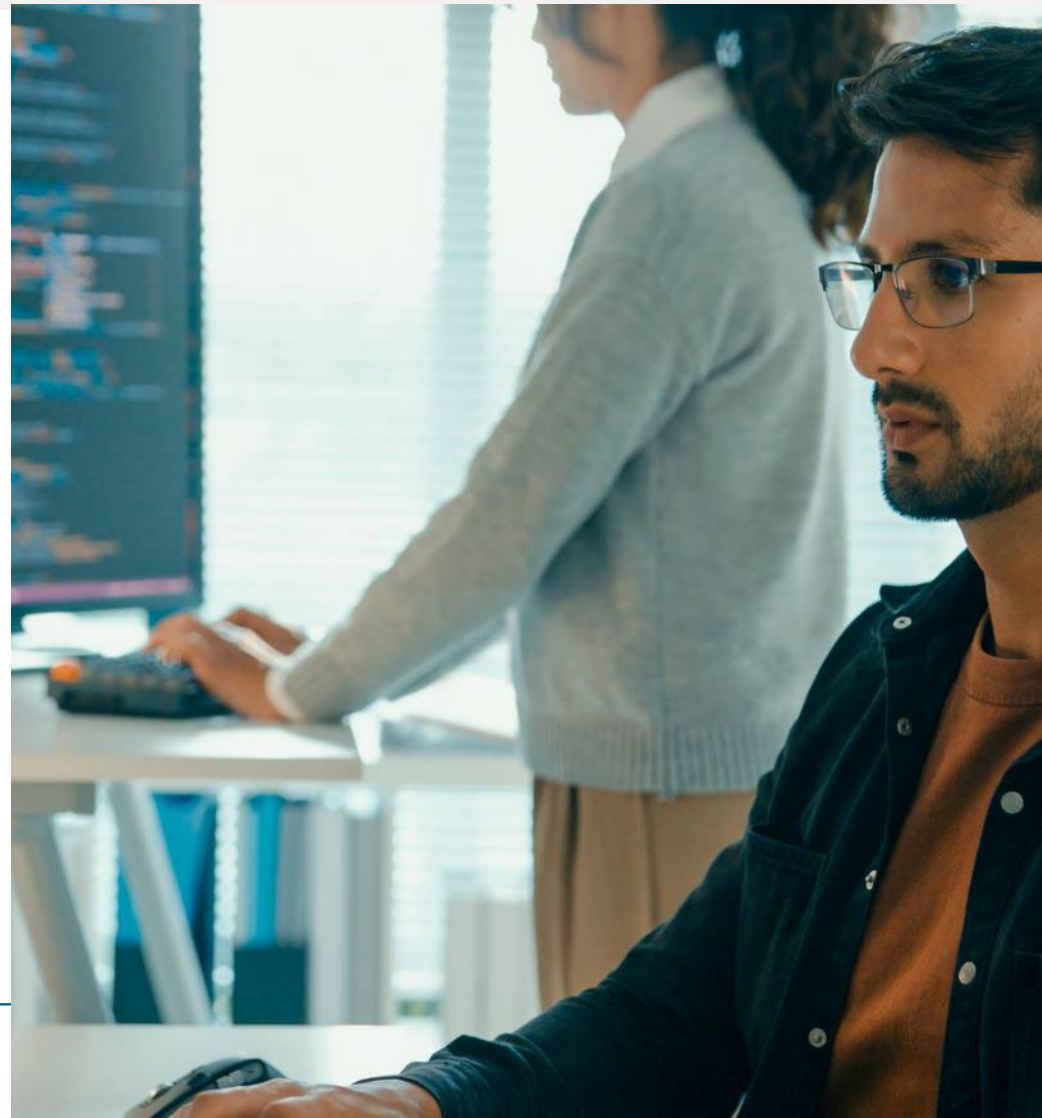
Understanding the modern A.I. Landscape

Before diving into applications, let's clarify the recent AI technology ecosystem.

- **Generative AI** creates new content from learned patterns;
- **Traditional automation** follows predefined rules;
- **Agentic AI** represents the next frontier—systems that autonomously pursue complex goals with minimal human intervention.

Combinations of these are emerging – resulting **hybrid A.I. solutions** focused on ‘best in class’ capabilities.

Understanding these distinctions helps you deploy the right tool for each challenge.



Illustrative AI examples

AI Types	Use cases
Generative AI	***Automated Report Drafting*** Generative AI can analyze accounting data and automatically write audit summaries, tax memos, or financial commentary. This streamlines documentation and enables quick turnaround on client deliverables
AI + Automation	***Invoice Processing and Validation*** Traditional automation systems can extract invoice data, cross-check with purchase orders, flag duplicates or discrepancies, and route items for approval—all based on business rules set by accountants or controllers.
Agentic AI	***Continuous Compliance Monitoring and Response*** Agentic AI in accounting can autonomously track regulatory updates across jurisdictions, assess impact on client operations, and initiate remediation actions—such as updating controls or suggesting policy modifications
Hybrid AI Solutions	***Client Onboarding and Risk Assessment*** A hybrid solution might use generative AI to create personalized onboarding content, traditional automation for document verification, and agentic AI to adapt the onboarding workflow to each client's risk profile

Demonstration using CBIZ Vertical Vector AI

Optimizing Generative AI

Basic Use – Single sentence, ‘one shot’ queries

Simple prompts involve straightforward instructions or questions given to an AI without detailed context, specific roles, or structured guidance. These prompts are brief, focused on asking for information or assistance on a single task.

"Analyze the monthly financial statements and identify the largest variances compared to last month."

Better - The CRIT framework

Context, Role, Instructions, Task

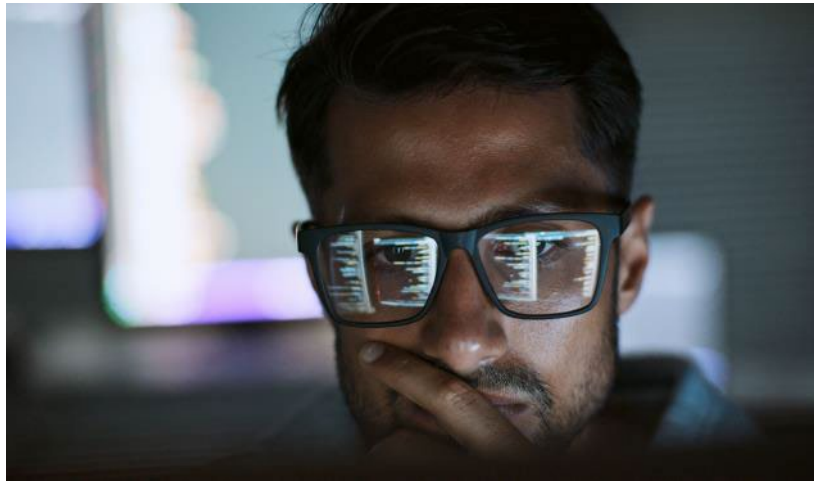
Transforms basic AI interactions into powerful professional tools. By structuring prompts systematically, you ensure consistent, high-quality outputs that meet professional standards.

"Act as a financial analyst at a mid-sized firm. Review the attached monthly financial statements and pinpoint any account variances exceeding 10% from the prior period. Summarize your findings in a business-appropriate format for executive review."

Agentic AI – the next evolution

Agentic AI has rapidly evolved from simple task automation to sophisticated systems capable of managing complex, multi-step workflows with minimal human oversight.

In the accounting and tax profession, Agentic AI can autonomously navigate multiple business platforms—gathering financial data, reconciling accounts, monitoring regulatory changes, preparing compliance reports, and even submitting tax filings.



Example Use Case: an agentic workflow might collect real-time transaction data from ERP systems, analyze for anomalies across subsidiaries, generate variance reports for management, and initiate corrective actions while simultaneously cross-referencing tax codes for accuracy. These coordinated, multi-agent scenarios boost efficiency and accuracy, allowing accountants and tax professionals to focus on strategic advisory rather than repetitive tasks.

CPE Question 1

What is the difference between a single prompt and a ‘complex’ prompt?

A. A complex prompt is considered ‘complex’ due to regulatory requirements
B. A complex prompt requires assigning a role to the AI platform
C. A simple prompt requires assigning a role to the AI platform

2

Gain insights into digital automation of traditional business processes

Modern Automation – beyond basic RPA

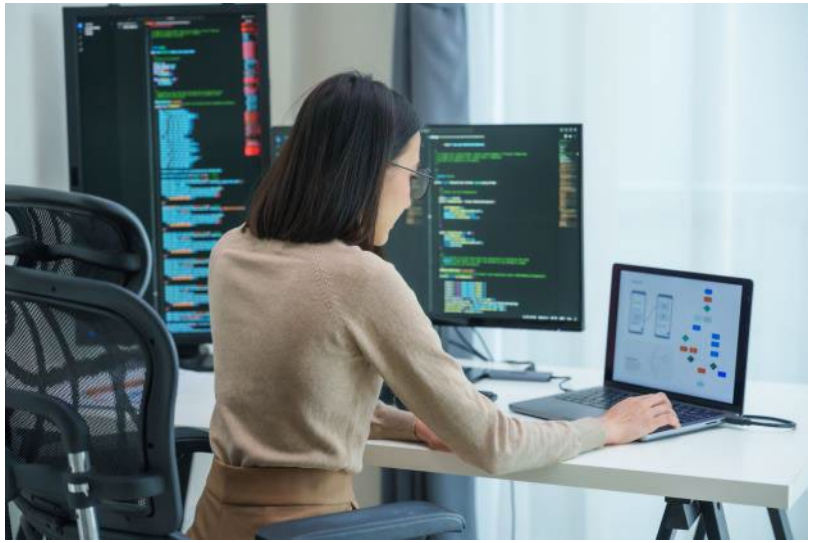
Modern automation transcends simple robotic process automation (RPA), incorporating AI to handle exceptions and make contextual decisions.

The convergence of automation and AI enables end-to-end process transformation, from data ingestion through client delivery. Success requires thoughtful process redesign, not just digitizing existing workflows.

Key RPA concepts

- **Traditional RPA:** Rule-based, structured data, predictable processes
- **Intelligent Automation:** Handles variations, unstructured data, exceptions
- **Orchestration:** Coordinates multiple systems and human checkpoints

AI & Automation: Accelerating the benefits



Generative AI and automation tools like UiPath are increasingly working together to transform task-based processes in accounting and tax services.

Automation platforms excel at handling repetitive actions—such as data extraction, validation, and transfer between systems—while **generative AI adds value by summarizing information, creating reports, and interpreting complex data patterns**.

- **Tax Compliance:** Automated data extraction from K-1s, 1099s into returns
- **Audit Testing:** Automated confirmation processing and follow-up
- **Month-end Close:** Journal entry creation, validation, and posting
- **AP Processing:** Invoice extraction, matching, and exception routing

Tip: Start with high-volume, low-complexity processes for quick wins

CPE Question 2

Automation and AI are now compatible. What is a scenario that optimizes journal entry analysis:

A. First - Automation of journey entries. Then - manually copying into public ChatGPT with client confidential information to ask questions.

B. First - Automation of journal entry tagging; then activating an AI platform like ChatGPT to inquire from originating system / source the nature of an exception. Do not put client confidential information within a public platform.

3

Learn how data analytics drives better insights and operational efficiency

Data Quality – the hidden differentiator

AI effectiveness is directly proportional to data quality—"garbage in, garbage out" has never been truer.

Data normalization isn't just cleaning; it's structuring information for optimal AI interpretation.

Studies show 40% improvement in AI accuracy with properly normalized data versus raw inputs.

Alteryx Demo Preview – Normalizing data

To help illustrate, a brief demonstration how Alteryx automates data preparation for AI consumption. This workflow takes messy, real-world data and transforms it into AI-ready formats.

➢ To Live Demonstration of Alteryx Workflow

1. **Input:** Multiple Excel files with varying structures
2. **Cleanse:** Standardize formats, remove special characters
3. **Transform:** Pivot data, calculate derived fields
4. **Validate:** Check completeness, flag anomalies
5. **Output:** AI-ready format with metadata

Building your data-first digital strategy

Successful digital modernization requires a data-first mindset. Before investing in AI tools or expensive visualization tools, assess your data maturity and establish governance protocols. Create a data quality scorecard and improvement roadmap. Remember: improving data quality benefits all systems making this a high-ROI investment.

Action Steps

- Audit current data state across key processes
- Implement quick wins (standardize date formats, entity names)
- Deploy automation for ongoing normalization
- Establish data quality KPIs and monitoring
- Deploy into a visualization platform to broader distribution with AI insights as next step

CPE Question 3

Data Analytics can improve AI effectiveness if used correctly.

Which of the following is a recommended use case for Data Analytics and AI:

A. Use data analytics tools to first remove upper and lower case characters before analysis with an AI platform.
B. Use data analytics tools to group all the information into one big block of text.
C. Use Data analytics tools to normalize information into the same index and format of data, spacing, and removing potential error formatting – before implementing an AI insights bot.
D. A and C.

4 Take the next steps in digital modernization

A roadmap for mid market firms

Better Practice: Success requires strategic sequencing, not wholesale transformation.

1. Start with a focused pilot addressing a specific pain point, prove value, then expand.
2. Build internal champions through early wins and invest in change management alongside technology. Most failures stem from trying to do too much too fast without proper foundation.

Critical Success Factors:

- Executive sponsorship with defined budget
- Mixed team (business + IT + operations)
- Clear problem definition before solution selection
- Rapid cycles: Explore, trial, assess, and evolve
- Regular communication of wins and learnings

Keeping a ‘person in the middle’ with AI

Trusting systems to ‘just work’ is inviting risk and outcomes are highly unpredictable. Having a ‘person in the middle’ enhances AI quality and digital modernization effectiveness by providing critical oversight, validating outputs, and ensuring that technology aligns with professional standards and business objectives.

Why does it matter? Human involvement allows for nuanced judgment, addresses complex scenarios that AI may misinterpret, and supports continuous improvement in processes and results.

CPE Question 4

Should AI be used without checking / sampling data to validate assertions or reporting content?

A. Yes – AI can be trusted with everything if the fonts are the same
B. No – you should always check and verify to ensure ‘human in the middle’ quality control

Now time for Discussion

CPE Question 5

What is seen as an effective AI implementation strategy for mid market firms?

A. Just give everyone access to ChatGPT and let it go.
B. Do a few training sessions on ChatGPT or Co Pilot and let people watch YouTube for answers.
C. Build a business case / problem & solution objective and invite AI minded colleagues to explore the topic with a focused schedule and objectives to be tested and solved for.


Thank you for your time today