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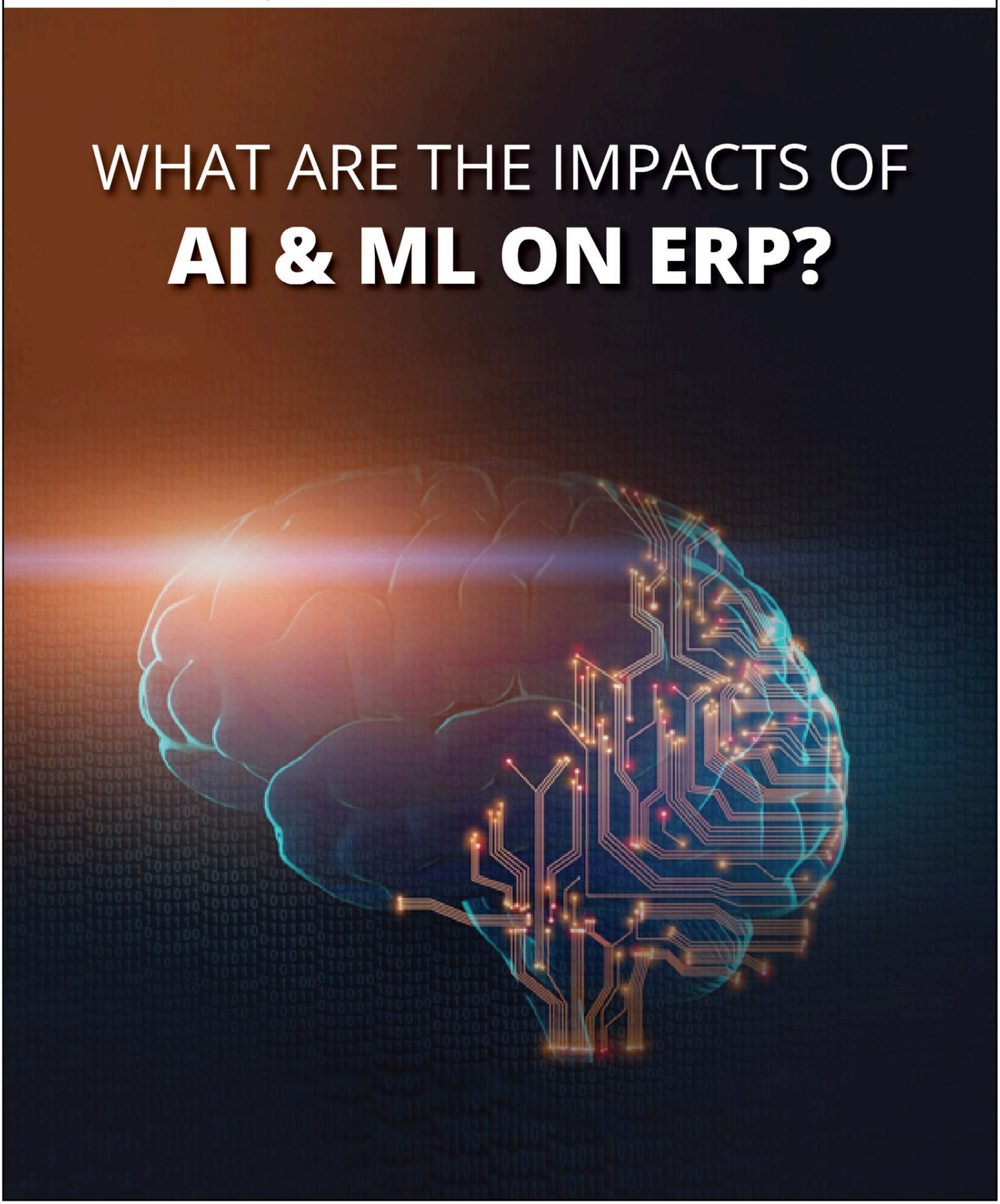
WHAT ARE THE IMPACTS OF AI & ML ON ERP?



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EDITOR'S NOTE

AI & ML tools are transforming the way businesses manage their processes and information and that is why the ERP systems today are quite different than what we had a few years back. AI & ML tools are increasingly being incorporated into ERP systems. Businesses have to get ready for the future with automation and innovation and come out ahead of the competition, so they should be ready for an intelligent ERP solution enhanced with AI and ML.

In this issue of ERPNews Magazine, we have asked the experts in the industry how AI & ML are transforming ERP systems and they shed light on the impacts of these tools on ERP.

Special interviews were done with the thought leaders of the foremost software vendors so I would say do not miss out on this issue:

- Andy Campbell, Global Solution Evangelist at Certinia shed light on the reasons for this rebranding and which attributes Certinia provides as a single Services-as-a-Business platform.
- James Bandy, Principal and Head of TriVista's Digital and Technology Practice, talked about how SMEs can benefit from AI and at what stage of their digital transformation journey they should start using AI technology.
- Bryce Wolf, Senior Manager of Industry Solutions at Unit4, talked about the top priorities of PSOs for growth in 2023 and how they can benefit from AI & ML.

The latest news on the ERP industry, customer studies, and much more are also awaiting you through the following pages as always!

Sincerely,

Pinar Sengul

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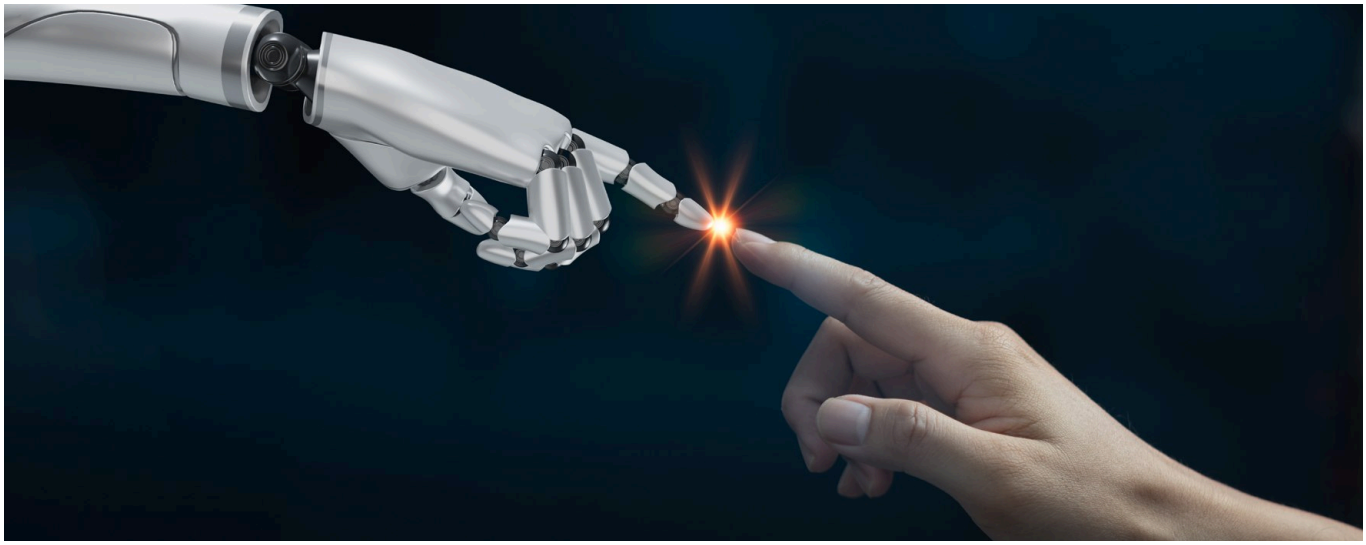


certinia

SEAMLESS AND EFFICIENT

Interview with **Andy Campbell,**
Global Solution Evangelist, Certinia

FinancialForce recently announced that it has changed its name to Certinia to align with the company's evolution and delivery of a comprehensive Services-as-a-Business (SaaB) platform. Andy Campbell, Global Solution Evangelist at Certinia shed a light on the reasons for this rebranding and which attributes Certinia provides as a single Services-as-a-Business platform.

1. Could you tell ERP News readers about yourself and your role at Certinia?

After 30+ years in the technology industry, I am now Global Product Evangelist at Certinia. My role is to help develop our market-leading propositions and then more broadly, to articulate the impact that they can deliver for companies in the services industry that are undertaking major digital transformation initiatives.

2. Certinia was formerly FinancialForce and recently changed its name to Certinia. Can you tell us the reason for this rebranding and what it reflects?

The company was founded in 2009 as the first to build a new type of financial accounting solution. As one of the initial enterprise applications built on the Salesforce platform, we decided to focus on an accounting solution that revolved around the customer account instead of the transaction ledgers. We called ourselves FinancialForce, which was honestly the perfect name at that time.

We quickly learned that the approach we took worked particularly well for service-oriented organisations where managing an ongoing customer relationship is essential. Based on this experience, we expanded our product portfolio into the PSA space and quickly became recognised as the market leader in professional services automation. We are very proud of this position and are pleased to have many significant companies that rely upon our solutions to run their services businesses.

As we worked with our customers to chart our growth, we identified new areas for innovation such as Services CPQ, Service-centric FP&A, and our Customer Success Cloud.

So today our solutions have moved well beyond the finance systems where we started and we are truly able to offer 'the platform for services businesses'. We focus our efforts on delivering solutions that help increase certainty for our customers, and the new name is designed to better reflect that position and what we offer.

3. Certinia provides a single Services-as-a-Business platform now that combines several different attributes. What are those attributes and how will the customers benefit from these?

There are three key tenets to our proposition for customers. The first is to run a connected business that enables the automated delivery of seamless and efficient business processes in a rapid, reliable, and error-free manner. The second is to deliver with intelligence. By having the right information, in the right place, at the right time, it is easier to make better, confident decisions and to ensure that both your teams and your customers have proper access to insights across the entire services journey. Lastly, we must ensure business agility. Every organisation must be agile and rapidly able to respond to external disruptions and changing customer demands while continuing to innovate and push the business forward.

When you add these three things together you get certainty. And business certainty has two major benefits for your company. First, it mitigates risk by giving you confidence in your business's current and future state. Second, it helps you increase trust with your customers. Being able to do exactly what you promised, exactly when you promised it, consistently, builds trust quickly between you and your customers.

4. AI & ML tools are transforming the way business processes and information are managed. How do you support your customers to build a strong digital transformation strategy and benefit from AI & ML?

Most companies are looking at how AI and ML might improve their business performance and rightly so, because there is a plethora of innovative business applications

> **EVERY ORGANISATION MUST BE AGILE AND RAPIDLY ABLE TO RESPOND TO EXTERNAL DISRUPTIONS AND CHANGING CUSTOMER DEMANDS WHILE CONTINUING TO INNOVATE AND PUSH THE BUSINESS FORWARD.**

being developed and the potential that they offer is very significant. But in building a strong digital transformation strategy it is important to do so based on a sound foundation, a technology platform that can underpin your business and your future ambitions. Certinia is built on the world-leading Salesforce platform, including AI/ML technology known as Einstein Discovery, which provides just such a solid strategic foundation.

In addition, it is worthwhile adding that any successful AI or ML initiative is largely dependent upon having a reliable source of data upon which to make decisions. Sadly this is where many AI projects fail if companies do not have these basic building blocks in place. Certinia and Salesforce combine to provide consistent and seamless business processes and deliver a common, reliable, single source of data across the business that embraces customers, operational and financial information. Having such a platform in place is essential for any services business looking to deploy AI technologies.

5. What are the applications of AI/ML in Certinia that would level up businesses in their digital transformation journey?

As you would expect we are continually thinking about the many ways in which advanced technologies such as AI can be brought into our product set. Rather than employ AI as a pervasive technology, our current focus is on those specific areas and use cases that will deliver tangible value to our customers. One example springs immediately to mind that demonstrates this approach. The use of intelligent staffing, where a customer can automatically produce the optimal allocation of available resources for a given selection of work. This will both increase utilisation rates and improve levels of profitability. There are several other use cases we're working on that we'll be able to discuss in detail over the next three to four months.

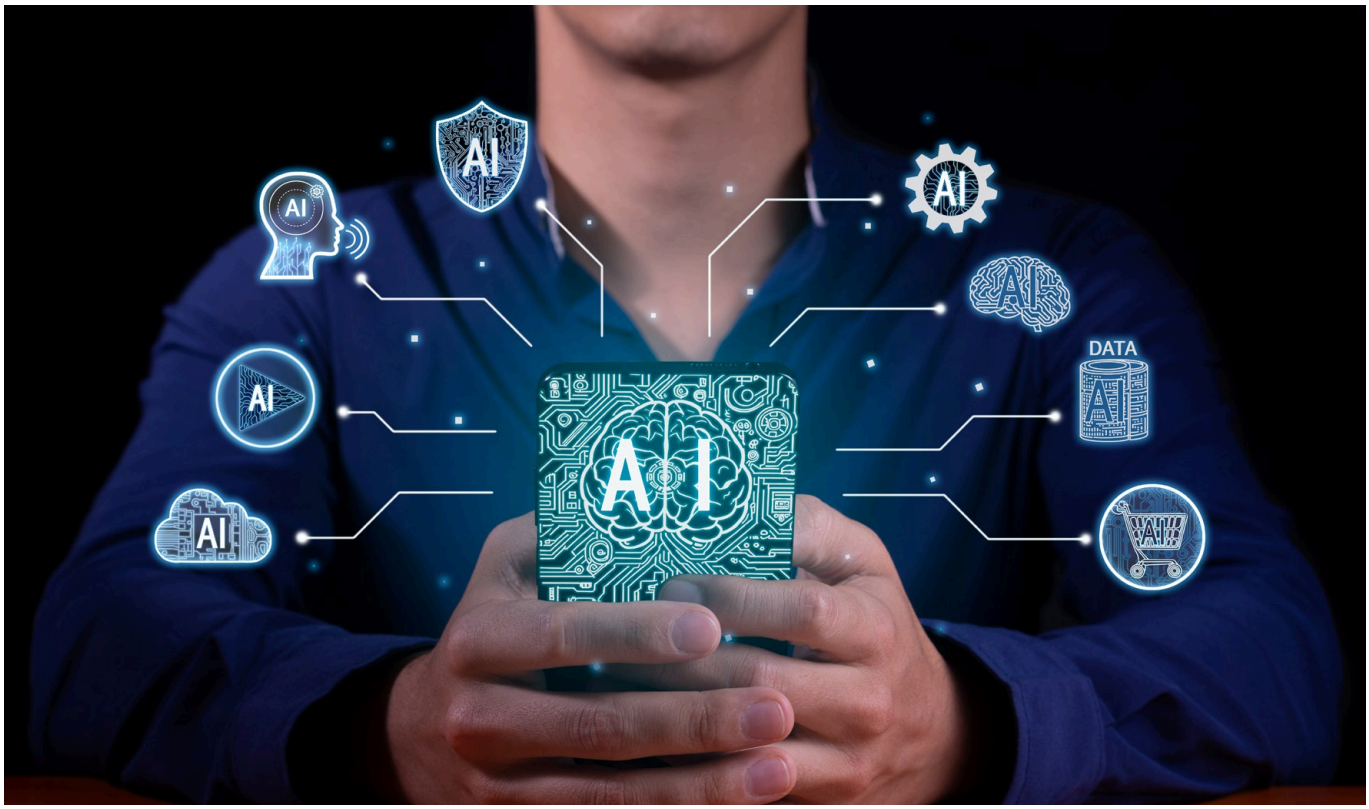
> **CERTINIA AND SALESFORCE COMBINE TO PROVIDE CONSISTENT AND SEAMLESS BUSINESS PROCESSES AND DELIVER A COMMON, RELIABLE, SINGLE SOURCE OF DATA ACROSS THE BUSINESS THAT EMBRACES CUSTOMERS, OPERATIONAL AND FINANCIAL INFORMATION. HAVING SUCH A PLATFORM IN PLACE IS ESSENTIAL FOR ANY SERVICES BUSINESS LOOKING TO DEPLOY AI TECHNOLOGIES.**

6. Could you tell us about the growth strategy of Certinia in the long term?

Certinia has grown significantly over the past few years, and we now have over 1,400 customers globally and employ more than 1,000 staff. Our product portfolio has also grown over the years and we now provide a complete platform for services businesses, from opportunity to renewal. Given the growth in the services sector, we see that the potential market for our solutions is very large and increasing all the time. There are real opportunities for growth both in our existing mature markets such as the US and UK, but we also see further expansion in EMEA. In fact, during Covid, we opened a new office in the Netherlands dedicated to supporting that market. In addition, there are newer emerging markets, such as Israel, where we have an increasing number of customers and implementation partners, so the potential for growth is significant.

About Certinia

Certinia (formerly FinancialForce) delivers a Services-as-a-Business platform that powers and connects all aspects of services operations, from services estimation and delivery to customer success management and financial planning and accounting. The company's Professional Services Automation (PSA), Customer Success, and ERP solutions—delivered on Salesforce's leading cloud platform – provide services businesses with the intelligence and agility to deliver high-quality services, elevate customer experiences and accelerate growth. Headquartered in San Jose, California with offices around the world, Certinia is backed by Advent International, Salesforce Ventures, and Technology Crossover Ventures. For more information, visit www.certinia.com.



OptiProERP MANUFACTURING

UNLEASHING THE POWER: EXPLORING THE IMPACTS OF AI & ML ON ERP

Article By ***George Yankovich,***
Director of Customer Engagement, OptiProERP

Enterprise Resource Planning (ERP) systems have long been the backbone of organizational operations, streamlining processes and integrating data across various departments. In recent years, the emergence of Artificial Intelligence (AI) and Machine Learning (ML) technologies has brought a new wave of transformation to the ERP landscape. AI and ML are revolutionizing how ERP systems function, enabling organizations to unlock unprecedented efficiency, accuracy, and innovation levels. So what are the profound impacts of AI and ML on ERP systems, and the benefits, challenges, and future possibilities?

Enhanced Decision-Making: One of the significant impacts of AI and ML on ERP systems is their ability to provide data-driven insights for better decision-making. By analyzing vast amounts of data, AI-powered ERP systems can identify patterns, correlations, and anomalies humans might miss. ML algorithms can learn from historical data, predict outcomes, and suggest optimal decisions. This empowers organizations to make informed choices regarding inventory management, supply chain optimization, pricing strategies, and more, increasing efficiency and profitability.

Process Automation: AI and ML technologies have revolutionized process automation within ERP systems. Repetitive and time-consuming tasks, such as data entry, inventory management, and financial reconciliations, can now be automated with the help of intelligent algorithms. This automation reduces manual errors, accelerates processing times, and frees human resources to focus on more strategic and value-added activities. Organizations can achieve significant cost savings, improved accuracy, and increased productivity by leveraging AI and ML for process automation.

Predictive Maintenance: With AI and ML, ERP systems can proactively monitor and predict critical assets and equipment maintenance needs. These systems can detect patterns indicating potential equipment failures or maintenance requirements by analyzing sensor data, historical maintenance records, and other relevant information. This enables organizations to schedule maintenance activities in advance, minimizing downtime, optimizing maintenance costs, and maximizing asset utilization.

Demand Forecasting and Inventory Management: AI and ML techniques have greatly enhanced ERP systems' demand forecasting and inventory management capabilities. AI-powered ERP systems can accurately predict future demand patterns by analyzing historical sales data, market trends, external factors, and customer behavior. This helps organizations optimize inventory levels, reduce stock-outs, minimize excess inventory, and improve overall supply chain efficiency. Moreover, ML algorithms can dynamically adjust forecasts based on real-time data, enabling agile inventory management.

Personalized Customer Experiences: AI and ML have transformed how ERP systems handle customer interactions and enable customized experiences. By leveraging AI chatbots and natural language processing, ERP systems can provide instant and accurate responses to customer queries, improving customer satisfaction and reducing response times. ML algorithms can analyze customer data to identify preferences, purchase patterns, and potential upselling opportunities, enabling organizations to deliver tailored product recommendations and personalized marketing campaigns.

> **AI AND ML HAVE TRANSFORMED HOW ERP SYSTEMS HANDLE CUSTOMER INTERACTIONS AND ENABLE CUSTOMIZED EXPERIENCES. BY LEVERAGING AI CHATBOTS AND NATURAL LANGUAGE PROCESSING, ERP SYSTEMS CAN PROVIDE INSTANT AND ACCURATE RESPONSES TO CUSTOMER QUERIES, IMPROVING CUSTOMER SATISFACTION AND REDUCING RESPONSE TIMES.**

Challenges and Considerations: While the impacts of AI and ML on ERP systems are undoubtedly transformative, several challenges and considerations need to be addressed:

a. Data Quality and Integration: AI and ML algorithms rely on quality data for accurate insights. Organizations must ensure data integrity, cleanliness, and compatibility across disparate systems and sources to maximize the benefits of AI and ML in ERP.

b. Ethical and Legal Concerns: As AI and ML technologies become more prevalent in ERP systems, ethical and legal considerations regarding data privacy, bias, and transparency become crucial. Organizations must establish robust governance frameworks to ensure the responsible use of AI and ML in ERP.

c. Skill Gap and Workforce Transformation: Implementing AI and ML in ERP systems requires skilled professionals who can develop, deploy, and maintain these technologies. Organizations must invest in upskilling their workforce or hiring talent to bridge the skill gap and embrace the transformative potential of AI and ML.

Future Possibilities: The impacts of AI and ML on ERP systems are still evolving, and the possibilities are vast. Some potential areas of exploration include:

a. Cognitive ERP: AI technologies such as natural language processing, sentiment analysis, and image recognition can enable ERP systems to understand and process unstructured data, opening new avenues for intelligent automation, analytics, and decision-making.

b. Prescriptive Analytics: ML algorithms can advance from predictive to prescriptive analytics, providing actionable recommendations and optimizing decision-making within ERP systems.

c. Adaptive ERP: AI and ML can enable ERP systems to adapt in real-time to changing business conditions, customer behavior, and market dynamics, leading to more agile and responsive operations.

AI and ML technologies are revolutionizing the ERP landscape, empowering organizations with enhanced decision-making capabilities, streamlined processes, predictive insights, and personalized customer experiences. While challenges exist, organizations that harness the potential of AI and ML in their ERP systems stand to gain a competitive advantage in the dynamic and data-driven business environment. As AI and ML continue to evolve, the future of ERP holds tremendous possibilities for organizations willing to embrace these transformative technologies.

Mr. Yankovich has held several positions within OptiProERP, culminating in managing Pre-Sales operations for the company. He is mainly known for his public speaking and presentation prowess. With decades of hands-on experience in the industry with Fortune 500 Corporations, including managing Production Planning and Engineering, he is highly knowledgeable in all aspects of business operations. That, together with his more than twelve years in consulting with manufacturing companies leading them to manufacturing excellence, enables him to provide insightful service to our customers. In addition, as a founding SAP Business One Partner with countless system implementations under his guidance and wealth of experience, he is uniquely qualified to guide you in your software selection and implementation journey.

About OptiPro ERP

OptiProERP is an industry leading ERP solution for manufacturing and distribution. OptiProERP delivers best-in-class industry functionality embedded into SAP Business One, the market-leading business management platform for small and midsize enterprises. Customers gain an end-to-end business management solution, including financials, accounting, sales, CRM, and industry-specific functionality that fully leverages deep industry expertise of over 20 years dedicated to serving manufacturers and distributors. OptiProERP is an eWorkplace Manufacturing solution. eWorkplace Manufacturing is SAP's strategic industry partner for manufacturing and distribution and its first OEM partner as part of SAP's global PartnerEdge Program. Serving manufacturers and distributors for over 20 years with OptiProERP and BatchMaster as its two ERP solutions, eWorkplace Manufacturing has gained the trust of over 3,000 customers globally.

A CONNECTED WORKER APPROACH TO MANUFACTURING LABOR CHALLENGES

Article By ***Glenn Graney,***
Marketing Director, Industrial and High Tech, QAD

It is universally understood that there are real challenges around labor in nearly every manufacturing enterprise. Hiring and sustaining the right workforce is currently the bane of every plant manager. This issue is neither new or surprising, but only recently are we better understanding the real issue and potential solutions.

For the last ten years or more consultants and pundits have been reporting about the pending manufacturing skills gap. Much of this was based on the aging workers who have deep rooted skills around specialized tasks. Many plants have had individual workers operating at the same surface mill machine for 30 or more years. These individuals have years of dedicated connection to a single station and have developed intimate relationships with their machines. For maximum effectiveness the operator developed specific knowledge of every aspect of the machine and the associated manufacturing process.

For a long time we envisioned some sort of transfer of this machine and process-specific knowledge to the next generation – either by deep internship or some sort of AI learning process. Neither of those approaches have really materialized. Frankly they were misaligned in terms of goals.

Today, the skills needed to operate a twenty-first century machine are completely different as machine builders have added layers of capabilities. Deep understandings of process attributes like metal cutting feeds and speeds

have been replaced with interactive controls that feel more like running a copy machine. The expectation is that an operator can be trained to produce parts on a high-tech machining center in a few shifts. Certainly there is a need for technicians for deep support of modern equipment, robots and technology, but that is a small set of individuals across the entire plant floor.

Equipment control, robots, part feeding and other forms of automation have removed the larger community of operators further from the actual processes. The next generation shop floor operator is more of a generalist. The common generational thread is that problem solving and adaptability are still paramount characteristics. The distinction is that the modern operator needs to use problem solving and adaptability as they move fluidly from role to role on a dynamic shop floor.

The contemporary shop floor requires a "connected" worker. The key word here is connected. Certainly the advent of IIoT allows for better connectivity to equipment and key sensor data. This connectivity allows for real-time monitoring and rapid identification and response to issues and real-time information about potential hazards and safety risks. There are certainly examples of how connectivity to equipment has generated positive results in shop floor productivity.

Perhaps more important is the connection of the shop floor operator with other operators and the extended shop floor team. Connected workers can share information and collaborate more effectively, which can help improve overall productivity and quality. In many ways the connected workforce is also a "collective" workforce. As operators become more generalists, the collaboration and knowledge sharing is critical to success. The need for every individual to have deep knowledge is reduced when the default approach is to tap into the broader collaborative group. The collective approach to problems may seem intuitive, but in many legacy manufacturing environments it needs to be nurtured and supported with systemic tools.

The collective worker approach is also the basis for next generation training and skill building. Daily and repeated collaboration is the very best way to assist the newest shop floor operators and develop and spread development opportunities that are tailored to specific needs and skill sets.

Support of this level of collaboration has delivered documented success in many of the most challenging manufacturing environments. It turns out that a focus on operator collaboration often results in both 25% productivity increases AND 30% reduction in staff turnover. Clearly better productivity means higher output from a finite set of operators and a constrained labor pool. However, the value of a connected, collective workforce that is more engaged, motivated and is more likely to stay connected to the organization can not be overstated.

The Silver generation and their dedicated work centers have our deepest gratitude for their efforts but the connected, collective workforce promises even greater results for the modern shop floor and the easing of the current labor challenges.

"THE COLLECTIVE WORKER APPROACH IS ALSO THE BASIS FOR NEXT GENERATION TRAINING AND SKILL BUILDING. DAILY AND REPEATED COLLABORATION IS THE VERY BEST WAY TO ASSIST THE NEWEST SHOP FLOOR OPERATORS AND DEVELOP AND SPREAD DEVELOPMENT OPPORTUNITIES THAT ARE TAILORED TO SPECIFIC NEEDS AND SKILL SETS.

Glenn Graney is QAD's Marketing Director for the Industrial and High Tech markets. He enjoys comedy and all things funny until he is the subject of the joke. He and his wife live in Wilmington, North Carolina where their grown children intermittently visit and their pets rarely stray.

About QAD – Enabling Adaptive Enterprises

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. To succeed in a turbulent world, facing disruptions in supply and fluctuations in demand, manufacturers and supply chains must rapidly respond to change and seamlessly optimize agility, efficiency, and resilience for effective customer service. QAD delivers Adaptive Applications to enable these Adaptive Enterprises. Founded in Santa Barbara, California, QAD has customers in 84 countries around the world. Thousands of companies have deployed QAD enterprise solutions including enterprise resource planning (ERP), digital commerce (DC), supplier relationship management (SRM), digital supply chain planning (DSCP), global trade and transportation execution (GTTE) and enterprise quality management system (EQMS). To learn more, visit www.qad.com or call +1 805-566-6100. Find us on LinkedIn, Twitter, Facebook and Instagram.

HOW AI/ML IS TRANSFORMING NONTECHNICAL ERP USERS INTO DATA-DRIVEN DECISION-MAKERS

Article by **Mona Patel,**
Director of Product Strategy, Infor

World's largest multi-dimensional forklift manufacturer, Combilift, is a great example, delivering AI-driven parts recommendations to staff in its parts department

An ERP system contains a wealth of data, as it captures every business process used to effectively operate and manage a business. Having accumulated volumes of data over time, ERP solutions present an ongoing challenge to put the power of data in the hands of a broader set of operational ERP users across the enterprise to help those users make smarter decisions.

Instead of leaving data-driven decision-making up to skilled analysts or select employees that have access to analytic reports and dashboards, composable ERP systems are broadening the reach of data-driven decision-making to front-line workers. With composable ERP, applying AI/ML to an ERP system means there is a tight coupling between the ERP user and data-driven insights. As an ERP user performs tasks and inputs data, AI-driven insights are automatically displayed in the context of the user's actions. This means every ERP user is now equipped with smarter and personalized decision-making power to improve business outcomes.

How is it possible for the ERP system to auto-analyze on behalf of a user who owns a piece of the business? Composable ERP allows data scientists to more easily operationalize ML models to solve business problems at scale. These include anomalies / outlier detections to recommendations and more sophisticated predictive and prescriptive implementations to make it easier to understand and consume.

Less friction and development is needed to deliver personalized, actionable insights through consumption

models of choice. In-context widgets, portal, mobile, and dashboards are all examples of consumption models that drive higher use and adoption either because these are the interfaces where users spend most of their time or they are where decisions are made.

As an ERP user performs day-to-day tasks in the front end, AI delivers easy-to-understand insights from the back end. Fortunately, AI tools such as digital assistants are now more widely accepted in the workforce because these tools have proven to enhance employee work life. ERP users no longer want to sift through the ERP system or mass-produced reports looking for answers. They now prefer to put their trust in machine-generated insights to make them more productive and accurate in their decision-making.

> **COMPOSABLE ERP ALLOWS DATA SCIENTISTS TO MORE EASILY OPERATIONALIZE ML MODELS TO SOLVE BUSINESS PROBLEMS AT SCALE. THESE INCLUDE ANOMALIES / OUTLIER DETECTIONS TO RECOMMENDATIONS AND MORE SOPHISTICATED PREDICTIVE AND PRESCRIPTIVE IMPLEMENTATIONS TO MAKE IT EASIER TO UNDERSTAND AND CONSUME.**

The Combilift example

The world's largest multi-dimensional forklift manufacturer, Combilift, is a great example of delivering AI-driven parts recommendations to nontechnical ERP users in the company's global parts department.

"Our global parts department relied on a knowledge-based, manual process in determining the sum of parts needed to service a truck," says Kenny Gilmour, global parts manager at Combilift. "This approach was not always accurate and consistent, especially with less-experienced staff. But now with AI-driven insights embedded directly in the parts estimator screen in our cloud ERP, users are equipped to create faster and more accurate quotes."

Combilift seized the opportunity to leverage AI to improve the customer experience by having the machine generate the right set of parts for service quotes. With expected high growth at Combilift, AI improves the efficiency and accuracy of recommending the right parts and scales the service quote process, reducing stress on staff and ensuring a first-time fix for customers.

When the right set of parts is not quoted for a service job, the service engineer sometimes cannot complete the job the first time around. Instead, the engineer must stop work, research, and secure the right parts, and then return to the customer to complete the service. The delay in completion increases the cost of the service, to the dealer and the customer, because the machine being serviced remains nonoperational.

With an aging workforce taking their tribal knowledge with them, AI is trained on this tribal knowledge and shared to ensure first-time fixes through accurate quoting. ""I have been here for almost 15 years quoting parts, and I can see that my experience and AI are in sync," Gilmour says.

Like it does in many other organizations, applying AI from ideation to value realization requires Combilift to have the appropriate expertise and infrastructure to effectively create, manage and expand AI innovations. Expert data scientists are expensive but necessary for organizations to continually explore new AI use cases. AI solutions also require ongoing monitoring, maintenance, and adjustments over the long term. Fortunately, Combilift subscribes to a dedicated team of data scientists and a cloud ERP platform to oversee and manage the ongoing use of AI in the organization instead of hiring a team of in-house AI experts and building a platform solution.

To expand the reach of insights, organizations are more likely to achieve success like Combilift by transitioning their ERP systems to the cloud. Consequently, the initial step in transforming nontechnical ERP users into data-driven decision-makers involves migrating the ERP to a cloud-based infrastructure. This move allows for easier storage, access, processing, and consumption of data, ultimately enabling more comprehensive and effective use of insights.

Mona Patel is Director of Product Strategy for Infor's Platform Technology. With more than 25 years of experience building analytic solutions at The Department of Water and Power, Air Touch Communications, Oracle, MicroStrategy, EMC and IBM, Mona is now growing her career at Infor. Mona received her Bachelor of Science degree in Electrical Engineering from UCLA.

About Infor

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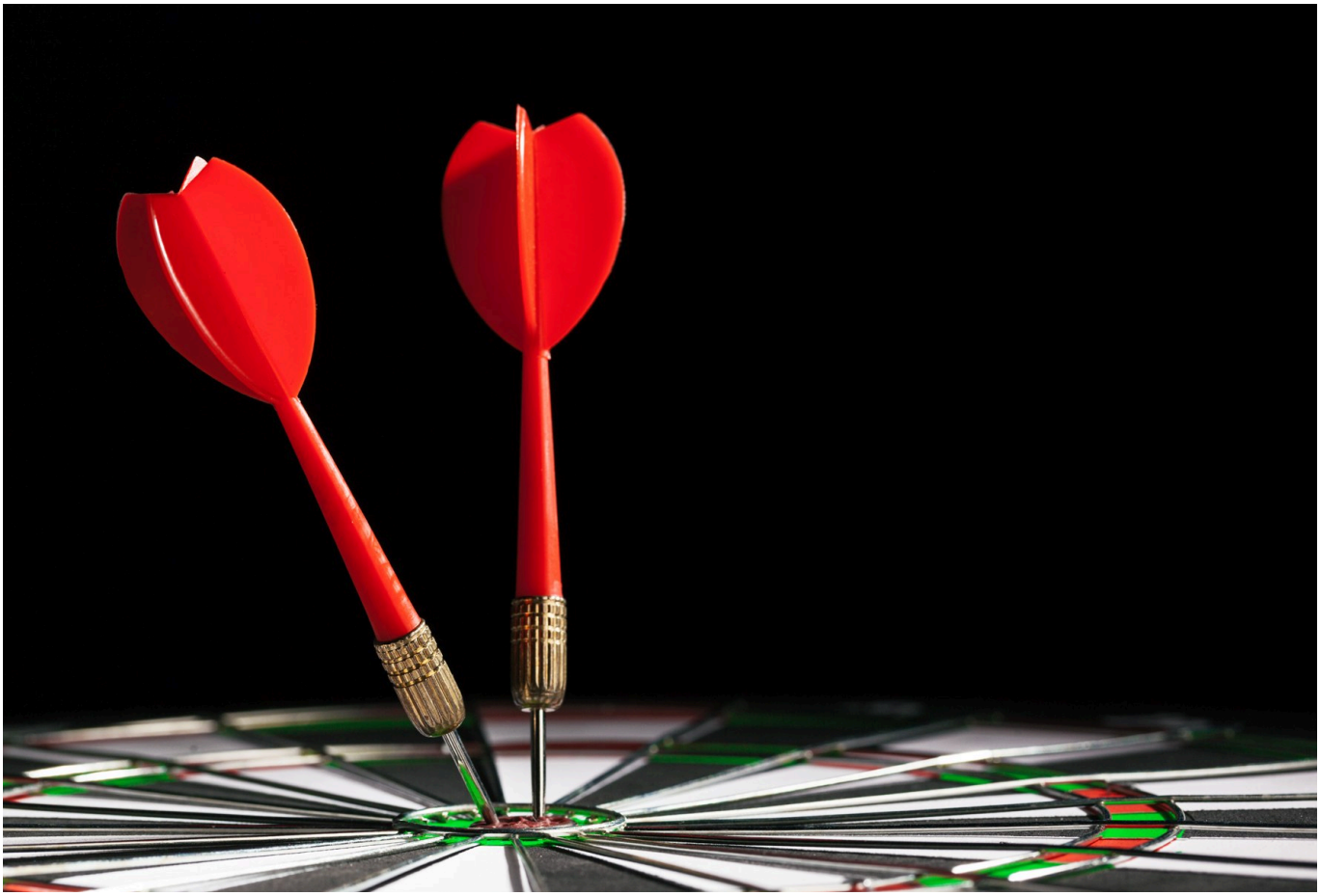


EPICOR

ERP AUTOMATION: HOW BUSINESSES CAN REAP THE BENEFITS

Article by **Kerrie Jordan,**
Vice President, Product Management, Data Platform, Epicor

Amidst a backdrop of economic uncertainty and global supply chain vulnerabilities, businesses need to remain profitable while crucially keeping up with evolving customer demands.

While many have already implemented robust and effective ERP systems to help manage their day-to-day operations – from manufacturing to sales – the key to continued success is automation. This can come in two forms — looking outward to automate your extended business from your ERP system or looking inward to automate the functionality of the ERP system itself.

With both approaches, automation has unlimited potential on what it can help businesses achieve. However, unleashing these benefits requires an understanding of how automating their business processes and integrating their current IT systems with the latest automation features can help to improve customer interactions.

Streamlining operations

ERP provides support in managing a range of business functions, from accounting and human resources to inventory and customer relationship management. Combining intelligent features into a single ERP system provides a comprehensive view of all business operations and enables companies to leverage the solutions that benefit them the most, by easily integrating additional industry-relevant ERP offerings.

In automating both their business and ERP software, companies can ensure that business units are no longer operating in silos thanks to insights gathered from across their entire supply chain and inventory. This standardisation and consistency can lead to competitive advantages such as revenue increase and customer retention, as AI-enabled ERP solutions are able to generate more accurate business predictions.

Keeping a people-focused approach

Automated ERP processes can reduce labour costs and result in higher productivity, with a report by McKinsey and Company finding that automation could almost double productivity growth globally by 0.8 to 1.4 percent annually. With the time that's saved, employees can instead focus their efforts on business growth and personal development.

When embracing new technology, it's important for businesses to keep their workforce front of mind. Automation can help optimise their data insights and intelligence with tools that are human-centric, keeping employees in control of the role the technology plays. Doing so will keep teams informed and make them feel empowered and valued. This not only creates a powerful advantage through innovation and speed, but can also help organisations build a workplace culture where teams feel invested in.

Additionally, by having all data secured in the cloud, automated ERP solutions allow employees to access their work remotely from any location with an internet connection. This enables businesses to stay in the loop with their customers and partners whenever and wherever they are, so they can react to any new requests or disruption with greater speed and agility.

WHEN EMBRACING NEW TECHNOLOGY, IT'S IMPORTANT FOR BUSINESSES TO KEEP THEIR WORKFORCE FRONT OF MIND. AUTOMATION CAN HELP OPTIMISE THEIR DATA INSIGHTS AND INTELLIGENCE WITH TOOLS THAT ARE HUMAN-CENTRIC, KEEPING EMPLOYEES IN CONTROL OF THE ROLE THE TECHNOLOGY PLAYS.

The importance of partnership

Although ERP automation can lead to consistency in both operations and performance, it isn't always plain sailing and implementation isn't always seamless.

The cost and expense of automation means businesses develop a long-term strategy for the workforce as the technology evolves. This includes adapting existing infrastructure and providing effective training and support to ensure employees have the right knowledge and skills to keep up with the changing workplace.

To reap the full benefits of automation investment, it's essential that businesses work with a trusted ERP partner, who can provide the right level of post-sales support. Epicor's 2023 Industry Insights report found that ERP customers place a high value on partnerships, with on average 97% of technology decision-makers surveyed viewing their ERP provider as a partner throughout the entire implementation journey.

RATHER THAN BEING FACED WITH AN ULTIMATUM OF CHOOSING BETWEEN TECHNOLOGY OR PEOPLE, INNOVATIVE AUTOMATION TOOLS CAN REDUCE REPETITIVE MANUAL TASKS AND FREE UP EMPLOYEES' TIME TO FOCUS ON THE WORK THAT ONLY A HUMAN BEING CAN DO — SUCH AS BUILDING PERSONAL CONNECTIONS WITH YOUR CUSTOMERS.

An experienced ERP partner will consider both your needs and your industry, by recommending new features that are tailored to your sector. For example, in manufacturing, solutions that can aid inventory management and lead-to-order cycle – such as Epicor's Automation Studio – and in retail, add-ons that can support a personalised customer experience through mobile point of sale.

A formula for success

ERP software is the backbone of digital transformation for many businesses, and automation is the key to unlocking its full range of benefits and applications. As technology continues to develop, it will drive an increase in people-centric automation tools that will improve productivity for businesses of any size and in all sectors.

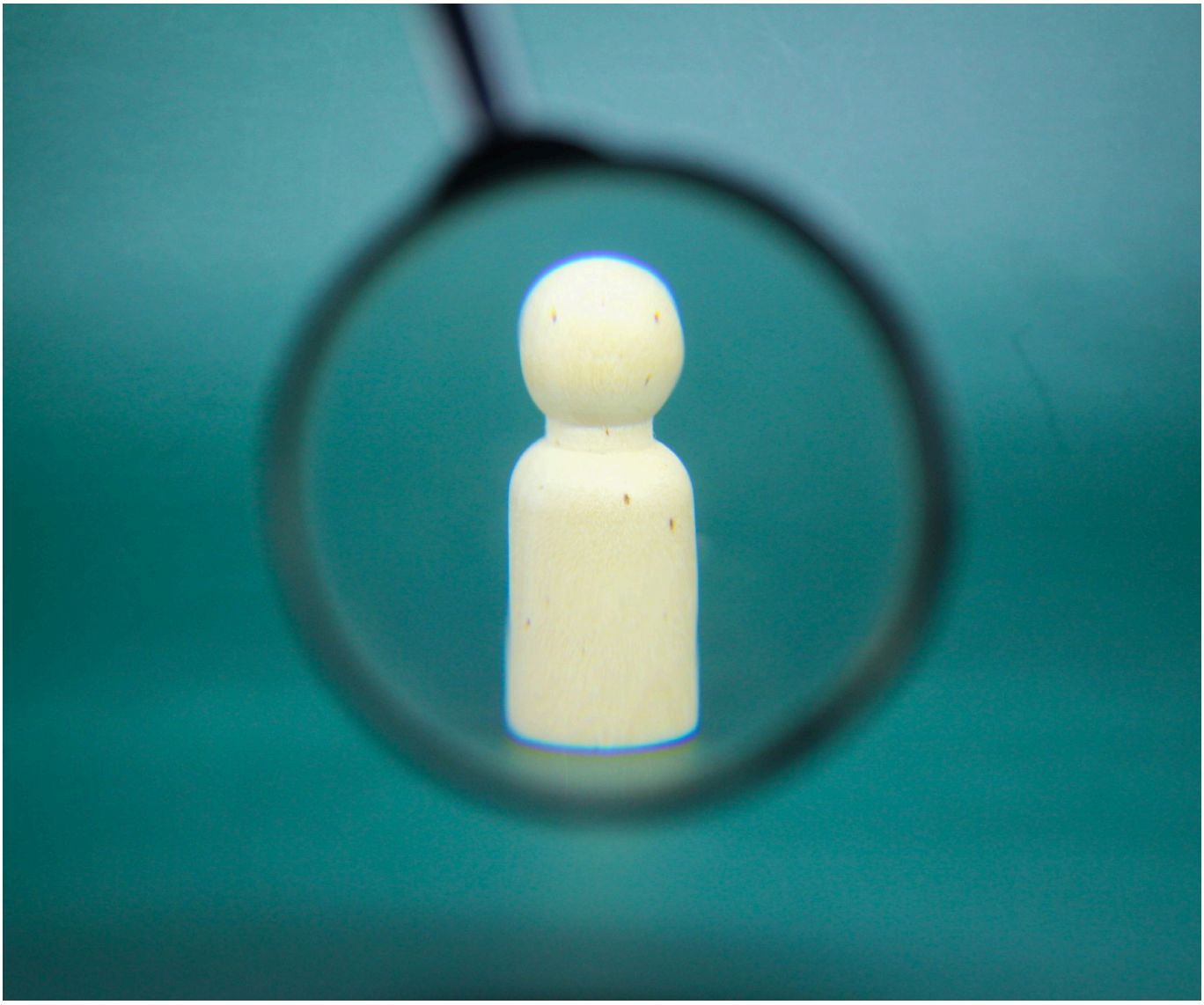
Rather than being faced with an ultimatum of choosing between technology or people, innovative automation tools can reduce repetitive manual tasks and free up employees' time to focus on the work that only a human being can do — such as building personal connections with your customers.

Putting people at the core of technology investments will mean that businesses are best positioned to boost internal process efficiencies and deal with any unforeseen market challenges on the horizon- whether it's economic storms or the volatility of global supply chains. A clear long-term automation strategy and strategic deployment of the right solutions will set businesses up for success.

Kerrie Jordan is Vice President, Product Management, Data Platform, at Epicor Software. In her role, Kerrie leads the strategic direction of Epicor's cloud-enabled solutions to ensure they continue to deliver high-value innovation, security, and performance for Epicor customers. Based in Richmond, Virginia, she brings over a decade of experience in ERP, supply chain, eCommerce, cloud computing, and product development solutions.

About Epicor

Epicor equips hard-working businesses with enterprise solutions that keep the world turning. For 50 years, Epicor customers in the automotive, building supply, distribution, manufacturing, and retail industries have trusted Epicor to help them do business better. Innovative Epicor solution sets are carefully curated to fit customer needs and built to respond flexibly to their fast-changing reality. With deep industry knowledge and experience, Epicor accelerates its customers' ambitions, whether to grow and transform or simply become more productive and effective. Visit www.epicor.com for more information.



FORTERRO

HOW TO SELECT THE RIGHT PERSON TO LEAD THE ROLL-OUT OF ERP SYSTEMS

Article by **Beniot Wabergue,**
VP of Cloud Products Strategy, Forterro

Implementing an ERP system doesn't need to be an onerous task, but finding the best person to lead the process is central to long-term success. Here, Benoit Wambergue, VP of cloud products strategy at supply chain technology specialist Forterro, explains how businesses can identify and support the most effective leader of their digital rollout.

A 2020 report from Make UK found that 80 per cent of British manufacturing businesses were confident that digital technologies would be a reality in their business by 2025, and the continued digitalisation of the UK's industrial sectors has resumed at a renewed pace over the last twelve months.

Manufacturing businesses in particular have traditionally been seen as the stomping ground of pen and paper, but now the vast majority of businesses understand the benefits of using an ERP system to streamline their back office functions.

For almost 10,000 businesses Forterro and its ERP providers have worked with, ERP systems have helped to simplify complex manufacturing and supply chain processes. This means they have to be able to handle a broad range of functional uses, and both collect data and streamline processes unique to individual companies.

The challenge of roll-out

For small and medium sized industrial businesses looking to benefit from the huge opportunities that digitalisation provides, there are a number of barriers to adoption which must be negotiated. Chief among them is the decision of who is responsible for the roll-out of new strategies and processes.

We frequently see businesses that have recognised a challenge with their current, outdated ways of working, and know enough about ERP systems to recognise that implementing one would alleviate these problems, but reach a stalemate around finding the best provider or implementing the solution.

While some businesses may have in-house capabilities, led by an IT department or production or procurement manager, others will opt for an external digital transformation consultant - selecting the right person to lead the process could be the difference between a successful roll-out and a costly failure.

> **FOR SMALL AND MEDIUM SIZED INDUSTRIAL BUSINESSES LOOKING TO BENEFIT FROM THE HUGE OPPORTUNITIES THAT DIGITALISATION PROVIDES, THERE ARE A NUMBER OF BARRIERS TO ADOPTION WHICH MUST BE NEGOTIATED. CHIEF AMONG THEM IS THE DECISION OF WHO IS RESPONSIBLE FOR THE ROLL-OUT OF NEW STRATEGIES AND PROCESSES.**

Finding your champion

Different people within the business often want different outcomes from the implementation of their system, so conflicting interests and varied skill sets mean it can be difficult to determine who should champion the project and drive it forward.

There are, however, some key attributes and skills that a person will need which are universal. Respect from across the business, for example, is vital to take employees with them on the implementation journey, while having the ear of senior management will help to secure and maintain buy-in to the project.

Understanding each department's operation, alongside a desire to listen and learn about each team's issues and challenges, is another important consideration, as well as good communication and project management skills to ensure the project doesn't stall and progress is reported across the business.

Production manager

As the person most likely feeling the pain of current difficulties, the production manager will be looking for a system that's easy to use, provides APS support and has a hotline to someone who can help. Their key aims are likely to increase their team's efficiency and boost capacity, so could have clear benefits for the production process, but may be underused in other back-office departments, such as accounting.

Senior manager

A senior manager is likely to look for as much data to be collected as possible to help their reporting and to inform better decision-making. Seniority will bring authority to the implementation and this should help to push the project along at a good pace, but this could also give staff the sense that the system is being imposed on them by someone without the detailed knowledge of their department.

Procurement manager

Having regular contact across departments is a vital asset for a successful implementation, as it is sourcing a supplier that will meet your business's requirements. However, a procurement manager is unlikely to be the key driver of the success of the new system after implementation and the metrics against which their job is measured means they may not look towards a long-term investment strategy, focusing instead on short-term costs.

Digital transformation consultant

Many businesses go down the route of hiring digital transformation consultants who are familiar with comparing and selecting IT providers, giving them an expert understanding of the technology available. This should result in a high-quality ERP, but a lack of knowledge of the details mean that what has worked for a similar business might not necessarily work for yours.

> **WHILE IT'S A GOOD IDEA FOR THE IT TEAM TO LEAD THE SEARCH FOR AND EVALUATION OF A NEW SYSTEM, PERHAPS WITH SUPPORT FROM THE PROCUREMENT MANAGER TO LEVERAGE THEIR BROAD KNOWLEDGE OF THE BUSINESS, IT'S NO SECRET THAT LARGE PROJECTS NEED EXECUTIVE BUY-IN TO SUCCEED.**

IT department

While the manager of your IT department might not have deep familiarity with the specifics of other departments' roles, they will have an overall view of each part of the business's activities, data structure, and reporting needs. Your employees will also benefit from guidance from a familiar source, who has a detailed knowledge of the limits of existing systems and habits of the people using them.

Who should lead?

Based on the experience Forterro and its ERP providers have at implementing systems in nearly 10,000 small and midsized manufacturing companies around the world, it's clear that one person cannot own projects alone.

While it's a good idea for the IT team to lead the search for and evaluation of a new system, perhaps with support from the procurement manager to leverage their broad knowledge of the business, it's no secret that large projects need executive buy-in to succeed.

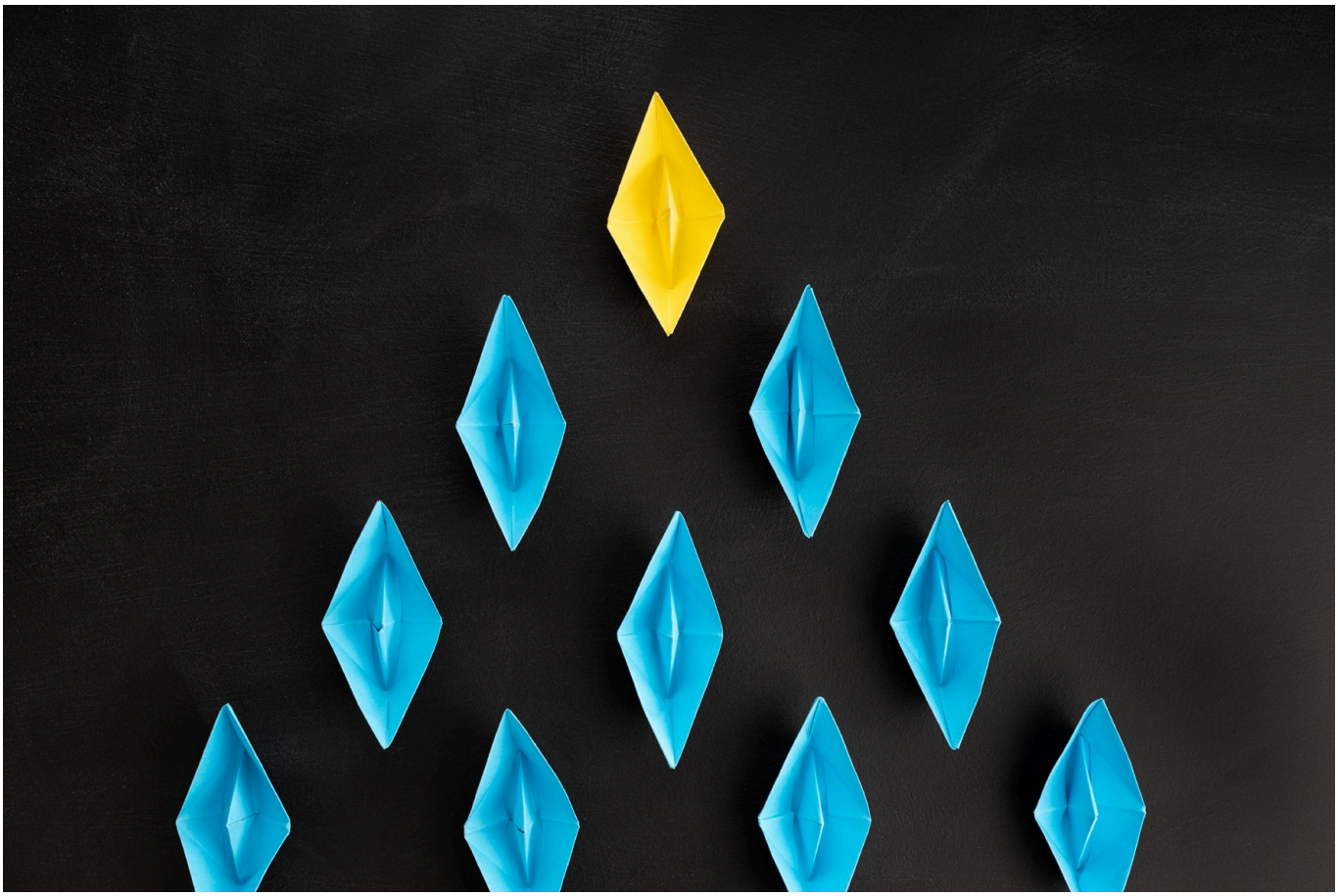
Even more importantly, those leading the system search and evaluation should always be in dialogue with departmental managers, with a clear project lead from each department who is likely to become a power user of the system.

Using a supplier with a SaaS model means your cloud-based system will be easier to implement and support will be on hand, alongside regular updates with the latest security and functionality. Vendor support and training is critical to a successful implementation, a good provider will guide clients through every step of the process to support people and help them to fully understand all functionality.

In modern businesses, information is key – regardless of your sector or market. While it's vital for a clear champion to lead on the selection and implementation process, the full support of senior management is essential to any project and it should be dedicated from every area of the business.

So when it comes to answering the question of who is responsible for your ERP? Everyone is.

For more information about Forterro, visit www.forterro.com



Beniot Wabergue, VP of Cloud Products Strategy at Forterro

About Forterro

Forterro is a federation of ERP software and services companies serving small to mid market companies around the globe, with offices in Germany, Sweden, Switzerland, France, Poland, India, Morocco and Austin, Texas. At Forterro, we invest in and help to fortify both local and niche ERP software businesses. Our product line businesses are local, not localized and vertical, not verticalized.
Learn more at www.forterro.com.

WHAT ARE THE IMPACTS OF AI & ML ON ERP?

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The goal of ERP software is – and has always been – to simplify business processes. While AI may conjure an image of complexity, the use of AI in ERP has quite the opposite effect. Greater automation and advanced analytics are enabling organizations to make faster and more effective decisions. And, by reducing the time needed to process information, AI frees up people's time to focus on more strategic and rewarding work.

We're now shifting from an era of digital transformation to an era of intelligent transformation – and that means business definitions and roles will evolve. While there is justifiably some concern around the future of AI, there are clear benefits of applying AI to enterprise technology: productivity gains, increased organizational resilience, more insightful use of data in decision-making and better customer experiences.

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Mike Ettling,
CEO, Unit4

UNIT4

SELECTING AN ERP SYSTEM: HOW TO KNOW WHAT IS RIGHT FOR YOUR BUSINESS

Article By ***Stephen Dombroski,***
Director, Consumer Products and Food & Beverage vertical markets, QAD

At some point during the life of a manufacturing business, or agricultural business that produces or packages products or sends them on to other businesses, the need for a complete business management system arises. For a manufacturer, horticulture or agri-business, this type of system is called an Enterprise Resource Planning (ERP) system. The "Planning" part of the name can throw people off because this is a system that is used for more than just planning. It is used by organizations to automate and manage the primary (if not all) business processes of the organization to drive optimal performance and adaptability to the ever changing business environment. Day-to-day business activities are managed by this system, such as accounting, procurement, project management, inventory management, materials requirements planning, compliance, quality, supply chain operations, risk management, asset management, manufacturing management and others. It is the first piece of software most members of the organization turn on in the morning and the last one to be shut down at the end of the day. An ERP system is the nervous system of the company.

"FOR A MANUFACTURER, HORTICULTURE, OR AGRI-BUSINESS, THIS TYPE OF SYSTEM IS CALLED AN ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM. THE "PLANNING" PART OF THE NAME CAN THROW PEOPLE OFF BECAUSE THIS IS A SYSTEM THAT IS USED FOR MORE THAN JUST PLANNING. IT IS USED BY ORGANIZATIONS TO AUTOMATE AND MANAGE THE PRIMARY (IF NOT ALL) BUSINESS PROCESSES OF THE ORGANIZATION TO DRIVE OPTIMAL PERFORMANCE AND ADAPTABILITY TO THE EVER-CHANGING BUSINESS ENVIRONMENT.

Managing operations today in any manufacturing organization is beyond complex and a central repository for data and systems for keeping all business processes aligned is essential. At the same time, the system needs to be flexible enough to be able to easily integrate with specialty programs for specific processes or industry specific processes. Now, when a company starts this process, they might immediately say, we need one specifically written for our specific industry. Depending on the industry, this might be true. However, there are ERP systems that are robust enough to work in most vertical manufacturing industries that allow for flexibility and adaptation, so to begin the selection process, one might start there. Why? Businesses change directions, buy companies, sell companies, buy and sell brands, so the ERP needs to be flexible, adaptable and agile. A comprehensive ERP system that has features for specific industries that can be initiated when needed might be the preferred way to go.

YOUR ERP SYSTEM NEEDS THAT FLEXIBILITY, SO IT'S IMPORTANT TO HAVE AN ERP THAT IS SCALABLE TO GROW AS YOUR BUSINESS GROWS. PLAN YOUR SYSTEM SELECTION ACCORDING TO WHERE YOU WANT TO GO, NOT WHERE YOU ARE AND CERTAINLY NOT TO SOLVE YESTERDAY'S PROBLEMS.

There are some primary features (for lack of a better word) that should be included regardless of industry.

Cloud - On-premise days are over for many systems, especially ERP. Profit margins are the focus of most industries now more than ever, so why tie up expensive IT resources managing the day-to-day management of a system when you can easily have the people who wrote it manage it for you. Not to mention, in today's world of cybersecurity fears, why not have the system be as secure as physically possible through the cloud vendor.

Scalability - "What do you want to be when you grow up?" Businesses today have to be able to change on a dime. Your ERP system needs that flexibility, so it's important to have an ERP that is scalable to grow as your business grows. Plan your system selection according to where you want to go, not where you are and certainly not to solve yesterday's problems.

Industry 4.0 and Advance Technology Adaptability - Food manufacturers and the agriculture industry in particular, are finally adapting the thought of industry 4.0 and advanced technologies. Automation is moving into these industries and interconnectability is becoming more important than ever. An ERP that enables smart organizations to advance is essential.

Compliance, Traceability and Conformance - Regulations are critical to all industries. This is especially true for anything connected with food or agriculture. Having an ERP system that can give you the ability to always be in compliance, manage traceability and be in a position to manage a recall is critical.

Supply Chain Management - There are systems available dedicated to managing all supply chain functions. But the base ERP system needs to have the ability to provide forecasting, manufacturing planning and supply planning capabilities as well as quality, warehousing and transportation.

Global Finance - Whether you want to be or not, almost all companies are global in some way. If you do not sell your products globally, you might source at least one ingredient or material from another country. And, if you don't know, you might in the future. Having functionality and processes to manage global financials is another critical area to consider in the selection process.

Automation of Business Processes - Every organization needs flexible business processes in today's world. Having the ability to tailor, adapt and change those processes within the ERP system will help your organization manage change into the future.

This is just a surface view of what should be expected out of an ERP system. The key is adaptability. Your ERP system needs to be able to grow with you as you grow - a system that can help manufacturers navigate today's issues and adapt to future needs.

Stephen Dombroski is QAD's Director for the Consumer Products and Food & Beverage vertical markets. Steve has over 30 years of experience in manufacturing and supply chain, and has helped multiple companies in a number of industries to implement S&OP concepts and processes.

About QAD – Enabling Adaptive Enterprises

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. To succeed in a turbulent world, facing disruptions in supply and fluctuations in demand, manufacturers and supply chains must rapidly respond to change and seamlessly optimize agility, efficiency, and resilience for effective customer service. QAD delivers Adaptive Applications to enable these Adaptive Enterprises. Founded in Santa Barbara, California, QAD has customers in 84 countries around the world. Thousands of companies have deployed QAD enterprise solutions including enterprise resource planning (ERP), digital commerce (DC), supplier relationship management (SRM), digital supply chain planning (DSCP), global trade and transportation execution (GTTE) and enterprise quality management system (EQMS). To learn more, visit www.qad.com or call +1 805-566-6100. Find us on LinkedIn, Twitter, Facebook and Instagram.

THE RIGHT ROADMAP

*Interview with **James Bandy,***
Principal and Head of Digital and Technology Practice, TriVista

We recently had the opportunity to discuss with James Bandy, Principal and Head of TriVista's Digital and Technology Practice, how SMEs can benefit from AI and at what stage of their digital transformation journey they should start using AI technology. He also shared his thoughts on maximizing value from ERP systems using AI and ML.

1. Could you tell ERP News readers about yourself and your role at TriVista?

I lead the digital and technology practice at TriVista, advising top executives across industries through digital transformation, cybersecurity strategy and integrated IT solutions, including ERP systems, AI, omnichannel technology and more. With a background ranging from startups to Fortune 500 leadership roles, I bring a unique perspective to clients focused on ensuring they remain proactive and not reactive when it comes to digital and technology strategy.I frequently support middle-market companies across the transaction process to maximize value through due diligence and audits.

2.TriVista is a leading advisory firm focused on operations, supply chain, technology, and executive recruiting, and provides services, especially to private equity firms. What should be the starting point for small-to-middle-market businesses to initiate their digital transformation journey and trigger a change in this unpredictable environment?

Before diving into the digital transformation process, there are three steps small-to-middle-market companies should take, but these also apply to larger corporations too.

- **Set a Budget:** First you need to set a budget to give you a guiding post and clear boundaries. Technology can often feel limitless, so a budget can help you understand what's possible and provide a starting place.

- **Designate a Champion/Leader:** Digital transformation should take a multi-function approach and therefore, you'll need to designate a champion to lead organizational change management (OCM). This person should be working across teams to ensure there is clear communication. Later this will ensure data is properly captured and more importantly shared.

- **Set Clear Goals:** It's important to know what the finish line is and where you're heading. Digital transformation is ever evolving, so it's important the team defines what success looks like to them. Is the goal to increase retention and upskill the team by automating mundane tasks? Does the team want to improve inventory forecasting capabilities through deeper real-time integrations to key business systems?

> **ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING ARE THE BUZZWORDS OF THE TECH WORLD BUT BEFORE DIVING IN, COMPANIES NEED TO ENSURE THEY'RE READY TO BENEFIT FROM THESE INVESTMENTS, ESPECIALLY SMALL-TO-MIDDLE MARKET COMPANIES LOOKING TO MAKE A POTENTIALLY BIG INVESTMENT. AI AND ML SHOULD BE THOUGHT OF AS SOMETHING YOU LEVEL UP TO WITH YOUR TECHNOLOGY STRATEGY, NOT THE STARTING POINT.**

3. Creating a successful technology strategy and the right roadmap is a challenging process for businesses. What would you advise your clients through the bumpy road of digital transformation?

To navigate the bumps and ensure a smooth road on your digital transformation journey, you must find and vet good providers. These partners and providers will be key in capturing the value in digital transformation. Once you have the right team in place, it's important you remain patient and often flexible. My top tips include being transparent and starting small.

- Be Transparent: Once you have your team and partners in place, you must keep the lines of communication open. They need to know what's working and what needs to pivot. The more you share regular status updates, as stakeholders across the team need be informed of success and learnings. Remaining transparent and flexible will increase the likelihood of success.

- Start Small: Digital transformation isn't a switch that can be flipped on. It's a process and sometimes starting small is your best bet. It's important your team learns to first crawl, walk, then run when it comes to taking on more digital opportunities. As improvements and updates are implemented, you can continue to scale and reinvest the ROI back into future digital transformation initiatives.

4. AI & ML tools are being incorporated into ERP systems now more than ever and they transform the way business processes and information are managed. How should middle-market companies shape up their strategy to benefit from AI & ML?

Artificial Intelligence and Machine Learning are the buzzwords of the tech world but before diving in, companies need to ensure they're ready to benefit from these investments, especially small-to-middle market companies looking to make a potentially big investment. AI and ML should be thought of as something you level up to with your technology strategy, not the starting point.

Before you move forward, you need to evaluate and ensure your ERP system is both capturing data and capturing necessary data, so it can be analyzed and leveraged productively. Our advice is to think of your technology strategy as a pyramid. What you have on the base is the necessities: an ERP system, collecting core and enriched data. Then as you move up, you're leveraging that data to unify workstreams and derive valuable insights without human intervention via AI and ML. And then at the top, you're putting those learnings into action(and executing on data driven decisions to further enable the business.

For example, by applying predictive analytics to historical and real-time production data in a modern manufacturing plant, we can identify patterns and correlations related to machine performance and failures. Machine learning algorithms, in turn, learn from these patterns to understand when and under what conditions equipment failures are likely to occur. This collective artificial intelligence system then predicts future equipment failures, allowing the plant to schedule maintenance proactively.

This not only prevents unexpected and costly downtime but also significantly improves the overall efficiency of the manufacturing process. So, in essence, this intersection of predictive analytics, machine learning, and artificial intelligence is powering smart manufacturing facilities, leading to what we often refer to as Industry 4.0.

5. Could you give us some examples of applications of AI/ML in ERP operations that would level up businesses in their digital transformation?

Two examples come to mind around maximizing value from your ERP system using artificial intelligence and machine learning.

Predictive Analytics: Learn autonomously from historical and current data and leverage the findings to make informed predictions about future events or trends. This can be a huge asset for forecasting, ultimately creating less manual work and allowing the company to scale up.

Robotic Process Automation: When you combine the power of machine learning with RPA, the results for the organization can be exponential. Begin with implementing

automation improvements for your most manual, repetitive processes and allow the system to continuously improve. This allows for better data quality, speed and employee satisfaction.

6. Could you tell us about the growth strategy of TriVista in the long term? Bliss to focus on company-wide messaging including:

TriVista's goal is to advise clients on how to leverage the most value from their systems and processes. The firm's growth strategy continues to be aligned with our clients, when they improve and grow, we both win. The team at TriVista also has a background within the industries they support setting them apart when it comes to understanding the unique challenges of each client.

Long term, TriVista will continue champion growth and innovation as our clients scale and evolve. Digital and technology remains a focus as every company is now a tech company in some capacity with digital transformation a top growth driver across industries.

"LONG TERM, TRIVISTA WILL CONTINUE TO CHAMPION GROWTH AND INNOVATION AS OUR CLIENTS SCALE AND EVOLVE. DIGITAL AND TECHNOLOGY REMAIN A FOCUS AS EVERY COMPANY IS NOW A TECH COMPANY IN SOME CAPACITY WITH DIGITAL TRANSFORMATION A TOP GROWTH DRIVER ACROSS INDUSTRIES.

James serves as Principal and Head of TriVista's Digital and Technology Practice. He works primarily with the firm's private equity and executive clients to lead technology and cybersecurity due diligence, business enablement, and technology advisory services. With experience ranging from founding and running a successful startup to filling senior leadership roles at multiple Fortune 500 companies, James understands the crucial role IT infrastructure and systems play in today's increasingly integrated corporate environment. James' fluency in Spanish has allowed him to become a leader in multinational environments integrating platforms and managing multinational teams throughout North and South America. Prior to joining TriVista, James served as the Senior Director of Information Technology at HD Supply, one of the largest MRO industrial distributors in North America.

About TriVista

TriVista is a leading advisory firm focused on operations, supply chain, technology, and executive recruiting that provides transaction advisory services to private equity firms, and performance-improvement support to operating companies. We bring our clients unrivaled due diligence and integration expertise through operations, technology and cybersecurity, food safety, and ESG due diligence work streams. As one of private equity's leading advisory firm, we've partnered with the world's top investors and executive leadership teams to transform businesses and drive enterprise value.

UNIT4

TOP PRIORITIES FOR GROWTH IN 2023

*Interview with **Bryce Wolf,***
Senior Manager of Industry Solutions, Unit4

Unit4 has recently published the findings of the Pierre Audoin Consultants (PAC) Study and we have discussed the key findings of the survey with Bryce Wolf, Senior Manager of Industry Solutions at Unit4. He talked about the top priorities of PSOs for growth in 2023 and how they can benefit from AI & ML.

1. Could you tell ERP News readers about yourself and your role at Unit4?

As a senior manager of industry solutions at Unit4, I oversee the delivery of Unit4's product strategy for our target verticals. Specifically, I focus on ensuring a complete solution for professional service organizations (PSOs) through the implementation of Unit4's PSO Industry Models and MESH. With my background working at management consulting firms, I understand firsthand the unique business challenges PSOs are up against.

2. Unit4 has just released the findings of the Pierre Audoin Consultants (PAC) Study: Professional Services - A Benchmark for 2023 in which senior business and technology executives at 400 large and medium-sized PSOs based in Europe and the US were surveyed. What are the key findings that relate to PSOs' business performance in the last year and their future plans?

One of our top findings from the study — which may seem counterintuitive — is that the professional services sector remains in expansion mode despite economic volatility. Remarkably, ***77% of PSO executives expect their headcount to grow*** in the year ahead and ***80% expect improvement in their operating profitability.*** However, we have seen some shifts in what's driving this growth since our previous study last year, in which M&A activity and the acquisition of

new customers were identified as the two most important growth drivers. Now, PSOs are primarily driving growth by selling more to existing clients and launching new products and services. Doubling down on existing accounts makes sense for PSOs in this volatile climate, because it can cost at least five times more to win business with a new client than to upsell an existing client.

> **THE CONCERNS FACING PSOS ARE LARGELY RELATED TO OPERATIONAL PERFORMANCE. EFFECTIVE PROJECT MANAGEMENT REMAINS A MAJOR CHALLENGE FOR PSOS, WITH 45% OF FIRMS FAILING TO DELIVER AT LEAST A QUARTER OF THEIR PROJECTS ON TIME LAST YEAR.**

3. What are the major concerns of PSOs that should be addressed if firms are aiming to drive operational efficiency and grow revenues?

The concerns facing PSOs are largely related to operational performance. Effective project management remains a major challenge for PSOs, with ***45% of firms failing to deliver at least a quarter of their projects on time*** last year. This sub-optimal project delivery is especially concerning as PSOs aim to prioritize repeat business with existing clients.

Attrition also remains a challenge for the PSO industry, with more than a third of firms wrestling with attrition levels higher than 20% last year — driven largely by lacking employee engagement and wellness efforts. Yet turnover is just one factor impacting project delivery. At a broader level, many PSOs are struggling with resource management: 42% of PSOs fell short of an 80% utilization rate in their most recent financial year.

There's a massive opportunity for PSOs to improve their productivity, but success hinges on having the right technology. This year's study found PSOs are increasingly concerned about their legacy systems, with 79% of business leaders viewing legacy applications as a barrier to innovation.

4. According to the findings of the survey, innovation, and transformation are the top priorities for growth in 2023, and AI & ML tools are becoming more critical for digital transformation now more than ever. What would you advise companies that want to build a strong digital transformation strategy and benefit from AI & ML?

Professional services firms remain at a lower level of digital maturity than other industry sectors, so accelerating their pace of innovation and adapting to market volatility will require investing in modern platforms to support areas such as project and workforce management. Organizations should take a holistic view of their digital transformation strategy and consider how to increase integration with key applications across the business to drive greater efficiency and insight. By adopting ERP systems with AI and ML capabilities, firms can break down data siloes and quickly surface insights for more data-driven decision-making.

> **PROFESSIONAL SERVICES FIRMS REMAIN AT A LOWER LEVEL OF DIGITAL MATURITY THAN OTHER INDUSTRY SECTORS, SO ACCELERATING THEIR PACE OF INNOVATION AND ADAPTING TO MARKET VOLATILITY WILL REQUIRE INVESTING IN MODERN PLATFORMS TO SUPPORT AREAS SUCH AS PROJECT AND WORKFORCE MANAGEMENT.**

5. AI & ML tools are transforming the way business processes and information are managed. How do you support your customers to create a digital transformation strategy that includes AI & ML?

Implementing AI & ML tools can seem like a daunting undertaking, so we encourage our customers to start small by integrating AI into specific business processes, such as data entry or invoicing. As the organization becomes more comfortable with the technology, they can expand its use cases.

Another critical area where we support our customers is through employee education. Resistance to change is common with shifts in technology, so it's important PSOs communicate the benefits to their employees and emphasize that the goal is not to replace jobs, but rather to free up employees' time to focus on the valuable work they want to be doing.

Lastly, we support our customers in continuously monitoring and evaluating the performance of their AI in ERP systems. Regular evaluations help organizations identify potential improvements and ensure they are getting the maximum benefits from the technology.

6. What are the applications of AI/ML in Unit4 that would level up businesses in their digital transformation journey?

Unit4's solutions use AI/ML to automate time-consuming, manual processes such as expense reporting and data entry — driving greater productivity and efficiency for PSOs. Our AI-powered systems also deliver real-time insights and analytics to organizations, which help them understand trends in project performance, identify areas for improvement and make more informed decisions about resource allocation. This real-time data access also drives enhanced customer service by helping organizations respond to customer requests and resolve issues more quickly. Additionally, our AI capabilities enable organizations to improve their compliance by automating compliance checks, such as checking regulations and standards or conflicts of interest.

"RESISTANCE TO CHANGE IS COMMON WITH SHIFTS IN TECHNOLOGY, SO IT'S IMPORTANT PSOS COMMUNICATE THE BENEFITS TO THEIR EMPLOYEES AND EMPHASIZE THAT THE GOAL IS NOT TO REPLACE JOBS, BUT RATHER TO FREE UP EMPLOYEES' TIME TO FOCUS ON THE VALUABLE WORK THEY WANT TO BE DOING.

Throughout his career, Bryce has consistently demonstrated a commitment to excellence, innovative thinking, and a customer-centric approach. His strong foundation in the software industry as a consultant and as a leader in product organizations, combined with exceptional leadership and communication skills, has positioned Bryce as a highly respected and sought-after expert in his field. With a solid background in the software and technology industry, Bryce has held various key positions at Unit4, FinancialForce, Oracle + NetSuite, JDA (Blue Yonder) and different consulting firms. Throughout his career, Bryce has demonstrated expertise in deploying global software solutions, delivering business outcomes with product innovation, and building strong relationships with customers, stakeholders, and partners to achieve successful outcomes. Bryce has excelled in leading cross-functional global project teams, driving long-term product visions, and advising customers on industry best practices. Additionally, Bryce has showcased his knowledge and industry experience as a speaker in the Unit4 Inspiration4U podcast, TSIA World Conference, SuiteWorld, and other various engagements further emphasizing his dedication to thought leadership and innovative thinking.

About Unit4

Unit4's next-generation enterprise resource planning (ERP) solutions power many of the world's mid-market organizations, bringing together the capabilities of Financials, Procurement, Project Management, HR, and FP&A to share real-time information, and deliver greater insights to help organizations become more effective. By combining our mid-market expertise with a relentless focus on people, we've built flexible solutions to meet customers' unique and changing needs. Unit4 serves more than 5,100 customers globally across a number of sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Save the Children International, Global Green Growth Institute and Oxfam America. For further information visit www.unit4.com. For more information, please visit https://www.unit4.com/, follow us on Twitter @Unit4global, Facebook: Unit4 Business Software, Instagram: @unit4global or visit our YouTube: Unit4 and LinkedIn page

BASE SAP CHANGES ON INFORMATION NOT INTUITION

Article by **Martin Metcalf,**
CEO, Basis Technologies

Change is the only constant in today's rapidly evolving business landscape. But whether big or small, changes to business systems can have a negative impact on operations, and in the worst cases, cause massive company-wide disruption, especially within the complex SAP systems sitting at the heart of many global organisations.

It's therefore imperative that teams gain a full understanding of the potential business impact before embarking on a critical change journey.

Gathering early information sits at the heart of this approach. Teams should map out the cost and scope of change as early in the change process as possible. By the time you've started the process and sent code through to QA (quality assurance), you've already invested time and money. And backtracking requires additional, unplanned resource.

In the past, SAP projects have often been based on historical anecdotes and people's subjective views – teams were expected to just know what was meant to happen. However, in a world where operations are becoming increasingly driven by AI and data, teams need assurance that projects are being planned based on real time updates – not just tribal knowledge and people's understanding.

It's this assurance and confidence that the modern business is screaming out for, in a world of tight margins and where everything can contribute to competitive advantage. Teams need to feel confident that these critical changes will take place as they need them to, without incurring unexpected fallout.

Here are three top tips on how to plan for critical changes within SAP, driven by information not intuition.

> **TEAMS SHOULD MAP OUT THE COST AND SCOPE OF CHANGE AS EARLY IN THE CHANGE PROCESS AS POSSIBLE. BY THE TIME YOU'VE STARTED THE PROCESS AND SENT CODE THROUGH TO QA (QUALITY ASSURANCE), YOU'VE ALREADY INVESTED TIME AND MONEY. AND BACKTRACKING REQUIRES ADDITIONAL, UNPLANNED RESOURCE.**

1. Prioritise empirical fact over opinion

First things first, the phrase 'I think' should never feature in conversations around critical business decisions or infrastructure changes. It's not about what you think, it's about what you know.

Often, organisations are reliant on existing experts to 'know' their systems. If they are to drive down costs and reduce risks across the change process, then the decision needs to be informed by data – releasing the costly expert resource for value-add activities.

Ultimately, it's as simple as removing the uncertainty or bias of asking people for their opinions. The only source of information that has the weight to shape business-critical decisions is empirical data.

2. Gain real-time updates

Organisations need the assurance that progress will not be held back by IT change delivery. Underestimating effort, unexpected re-work, and reduced change quality all contribute to unnecessary and costly business delays.

Teams therefore need complete visibility. Armed with real-time data, organisations will achieve three core principles of change within SAP: improved accuracy, reduced costs and eliminated risks.

As a result, they will better understand the impact of change across the business earlier in the process, with foresight over potential risks before they happen, which in turn helps to reduce the financial burden of change.

3. Resource effectively

Part of the process of preparing for inevitable changes and evolutions in testing needs is improving resource planning. This means assigning the most cost-effective team from the outset.

Pressure on resourcing is one of the biggest priorities for businesses, and there are several components to consider. For example, expensive experts need to be allocated to the most complex or business-centric items.

A motivated and engaged team will outperform every single time. It's the business' responsibility to arm these valuable assets with all the necessary insight and tools they need to excel.

So, with all of this in mind, what will you be basing your decisions on for your next SAP project: information or intuition?

> **PRESSURE ON RESOURCING IS ONE OF THE BIGGEST PRIORITIES FOR BUSINESSES, AND THERE ARE SEVERAL COMPONENTS TO CONSIDER. FOR EXAMPLE, EXPENSIVE EXPERTS NEED TO BE ALLOCATED TO THE MOST COMPLEX OR BUSINESS-CENTRIC ITEMS.**

Martin Metcalf is the Chief Executive Officer at Basis Technologies and was appointed in February 2013 to drive the company's vision and business strategy and build a world-class software company. Martin has over 30 years of experience in the IT market with a wealth of SAP expertise having previously held the position as SAP Regional Managing Director responsible for the UK, Ireland, Nordic Countries and Sub Saharan Africa.

About Basis Technologies

Basis Technologies is trusted by the world's best-performing organizations to unlock their full potential with SAP. Our industry-leading solutions help businesses drive transformation with confidence, achieving the freedom to outpace competitors while safeguarding critical systems that maintain business continuity. We help the likes of P&G, Honda, Boeing, and Booking.com lead the way by bringing actionable insights and automation to SAP change.

3I INFOTECH WINS MANAGED SERVICES DEAL OF RS. 18.74 CR FROM BAJAJ ELECTRICALS LIMITED

3i Infotech Limited, a global Information Technology company, has been awarded a 5 year contract by Bajaj Electricals Limited, one of India's leading consumer electrical equipment manufacturing companies, for Managed Services. The total contract is valued at approximately Rs. 18.74 crore spread across five years, plus one time roll out service fees of approximately Rs. 60 lakhs. Under the remit 3i Infotech would provide Bajaj Electricals with specialized Managed Infrastructure Services for End User, DC & Network, Cloud Management & Database Management, and IT Application Support. This comes at the back of 3i Infotech bagging several large multi-year contracts across various industries and verticals.

With more than 1,500 skilled resources for infrastructure support to its IMS customers, 3i Infotech has tremendous experience in DIMS for large enterprises. Furthermore, the company has the capability to specifically hire, skill and groom the new talent to cater to such large-scale enterprise managed services requirements. The company also hires laterally to align with resource needs.

Speaking on this win, ***Mr Thompson P. Gnanam, MD & Global CEO, 3i Infotech*** said, "While we recently announced a major Digital Infrastructure Managed Services (DIMS) win with a private sector bank, we are happy to add another prestigious client from the manufacturing domain to our growing client roster. I would like to reiterate myself, that whether it's the country's largest refiner or some of the biggest BFSI companies, and now manufacturing companies, we serve them all through our differentiated offering, and we are sector agnostic. We have a very mature, robust, best-of-breed DIMS offering built over two decades. Our DIMS has capabilities to develop and implement transformational roadmaps for complex enterprises at scale. It enables enterprises to build, operate and manage NextGen infrastructure for digital transformation, ensuring that it is robust, flexible, secure, and scalable."

3i Infotech's Digital Infrastructure Managed Services comprising IT Infrastructure and Cloud, help clients in optimizing their IT spending. With over 200 clients, more than 3000 infrastructure professionals, and an integrated HybridNXT Support framework for On-Prem & Hybrid Eco-System, the company is a one-stop-shop for any enterprise's Digital Transformation needs.

About 3i Infotech

3i Infotech Limited incorporated in 1993 and headquartered in Mumbai, India, provides information technology services and software solutions. Since its inception the company has 25+ years of experience in delivering business value to its clients across multiple industry verticals. 3i Infotech has emerged as a leading name in propelling the current wave of digital transformation initiatives, with deep domain expertise across BFSI, Healthcare, Manufacturing, Retail, and Government sectors. The company currently stands with a strength of 8000 employees and over 500+ clients across the globe. It operates through three key segments, (1) Enterprise Services (includes ADMS, ISMS, Testing, Classic BPS, MVS etc.), (2) Professional Services (includes Human Capital Mgt. Services) and (3) Digital Business Services (includes IT & Digital Consulting, Application-Automation-Analytics (AAA), Digital Infrastructure Management Services (Digital IMS), CloudFirst, Oracle COE, Global Command Centre (GCC), Cyber SOC, Digital BPS, Cognitive Computing Services, 5G Lab as Service, Private 5G, IoT, Cyber Security Services, Secure Access Service Edge (SASE), AgriTech, Telecom Media Entertainment (TME), Edge Computing, Edge Analytics, NuRe Campus, FutureTech, etc.)

Global Shop SOLUTIONS

10 AREAS MANUFACTURERS MIGHT SEE AN IMPACT FROM AI

Article by **John Davis,**
CTO, Global Shop Solutions

Few technologies have changed the manufacturing industry as much as ERP software. From automated scheduling to precision inventory management, automated purchasing, real-time job costing and more, ERP simplifies production processes so manufacturers can work faster and more efficiently while delivering a quality product on time every time. The next transformative technology – artificial intelligence (AI) and machine learning (ML) – is already having a significant impact on our industry by changing the way manufacturers collect, process, and analyze data.

Over the past decade, one of the biggest advances in ERP has been the ability to communicate and integrate with machines and external software programs to lower costs and increase efficiency. For example, BOM Compare software can reduce engineering costs and get jobs into production much faster by expediting the design to production process. Integrating ERP with Nesting software can significantly lower material and labor costs and reduce scrap by automatically determining the most efficient way to cut parts on a piece of metal.

AI takes these capabilities to new levels with unprecedented predictive data tracking and analysis. AI can be programmed to learn from the data ERP software gathers to make deeper and more accurate predictions regarding customers, buying habits, inventory levels, markets, material purchasing and more.

Before we list 10 ways AI is enhancing ERP capabilities, let's look at what makes it a game-changing technology.

AI: Computer Self-Learning at Your Service

The magic of AI is that it gives machines the ability to learn from experience so they can adapt to new inputs and perform tasks that have always been performed by humans. This requires computers to engage in deep learning and natural language processing so they can understand, interpret and manipulate human language. When computers integrate with these technologies, they can be trained to accomplish specific tasks by processing and recognizing patterns in vast amounts of data.

This doesn't mean AI can accomplish tasks without human guidance. AI needs people to set up the system to recognize patterns and ask the right questions. When programmed correctly, AI can:

- Automate repetitive learning
- Add intelligence to existing products
- Achieve incredible accuracy through deep neural networks
- Adapt itself through progressive learning algorithms so the data can do the programming

ERP gives manufacturers an advantage by tracking data in every aspect of the business. AI goes a giant step further by analyzing more data at a deeper level. When AI algorithms become self-learning, the data becomes an extremely valuable asset.

10 Ways AI Can Make Your Manufacturing Better

The goal with integrating AI and ERP is essentially the same as ERP when it was first developed – simplifying manufacturing to improve operational efficiency and increase profitability while growing the company. The difference is that with AI manufacturers can track and analyze predictive data as well as current and historical. With its self-learning capabilities, AI can also assist manufacturers in their decision-making when the relevant data, parameters, and variables exceed human understanding.

1. Inventory Management

AI-integrated ERP software helps manufacturers optimize inventory management by predicting demand, identifying slow-moving products, and automating order fulfillment. According to a study by McKinsey, companies that utilize AI to optimize inventory can reduce inventory levels by up to 50%.

Managing inventory is mostly a reactive process, measuring stock levels and ordering materials based on historical usage and seasonal trends combined with estimates of expected customer orders. AI-based inventory planning makes it more proactive with:

- Increased visibility of inventory KPIs
- Improved product, channel and location forecasting that includes seasonality and trend data
- Automatic classifying of SKUs to identify what's needed to meet demand
- Replenishing SKUs faster with predictive ordering based on anticipated changes in supply and demand

> **AI CAN BE USED TO PREDICT DEMAND FOR PRODUCTS BASED ON HISTORICAL DATA, MARKET TRENDS, AND CUSTOMER BEHAVIOR, HELPING TO OPTIMIZE PRODUCTION SCHEDULES, REDUCE LEAD TIMES, AND AVOID STOCKOUTS.**

2. Quality Control

AI-based inspection systems can identify defects and anomalies in manufacturing processes in real-time, thereby reducing the risk of product recalls and improving overall quality. For example, image recognition algorithms are capable of analyzing images of products on the assembly line to identify defects that may not be visible to the human eye.

AI is also changing the way quality gets inspected. Machine vision is an integral part of many quality applications. With its deep learning capabilities, AI-powered quality control software can self-learn which aspects are vital and create rules that determine the features needed to define quality products.

3. Pricing Optimization

AI-powered ERP software can optimize pricing by analyzing market trends, competitor pricing, and customer behavior. With this data, manufacturers can make better-informed decisions to optimize prices for their products, resulting in higher profits and better customer satisfaction.

AI's deep data dives allow you to model how customers will respond to price changes based on historical sales data. It also lets you factor customer behavior into pricing strategies, predict how different prices will impact sales, and combine experience and data to increase prices without damaging sales. AI predictions aren't 100% accurate, but they inform gut feelings about effective pricing strategies.

4. Demand Forecasting

AI can be used to predict demand for products based on historical data, market trends, and customer behavior, helping to optimize production schedules, reduce lead times, and avoid stockouts. With AI you can predict consumer demand for every SKU by taking into account seasonality, pricing, promotions, and product lifecycles.

AI offers the unique ability to engage in demand forecasting across different time horizons. This includes near-term demand sensing, a forecasting method that combines AI and real-time data to create a forecast based on current supply chain conditions. Other AI-enabled forecasting includes direct-to-consumer and e-commerce. AI can also combine supply, sales, finance, and marketing projections into a holistic view of demand across your entire enterprise.

5. Supply Chain Management

As we all experienced during and after COVID, disruptions to supply chains can create serious problems. AI-powered ERP software helps optimize supply chain management by predicting supplier lead times, identifying bottlenecks, and optimizing logistics routes to reduce lead times, lower costs, and increase customer satisfaction.

AI algorithms analyze data to predict which products will be in demand and in what quantities, reducing strains on specific links of your supply chain. AI can also provide upgrades to important supply chain elements, including:

- Improving warehouse supply and demand management
- Improving the health and longevity of your transportation vehicles
- Making your loading processes more efficient
- Helping supply chain managers reduce costs and increase revenues

6. Predictive Maintenance Scheduling

Proper maintenance is essential to minimizing downtime, reducing repair costs and extending the life of your machines and equipment. AI helps achieve these goals by predicting equipment failure and scheduling preventative maintenance before a breakdown occurs.

AI collects and processes data from sensors, cameras, logs, and other sources. Engineers then analyze the data to make predictions and recommend maintenance actions. In addition to protecting your machines and equipment, AI can:

- Improve safety by minimizing human errors and accidents
- Reduce quality defects
- Increase efficiency and productivity
- Support innovation, sustainability and environmental compliance with data-driven decision making

7. Labor Management

Labor costs are often the biggest line item in the manufacturing budget. AI-powered ERP software can help reduce labor costs and increase productivity by predicting employee productivity, identifying training needs, and optimizing scheduling.

AI can also alleviate another costly labor problem – workplace injuries – by limiting shop floor personnel's exposure to powerful, unwieldy machinery and dangerous tasks. AI does this by streamlining or automating risky processes that can lead to serious injuries.

8. Real-time Analytics

AI-powered ERP software provides real-time analytics on key performance indicators such as production rates, inventory levels, and quality metrics to help you make data-driven decisions and identify areas for improvement.

While conventional data analysis methods do a good job of organizing and distributing IoT data, AI does it faster and with greater precision by identifying patterns and inconsistencies in real-time. AI algorithms process data from different sources and present it in a consistent manner, making it easier to structure the data for analysis. AI speeds up real-time analytics by preparing, analyzing and assessing data as soon as it is available.

"LABOR COSTS ARE OFTEN THE BIGGEST LINE ITEM IN THE MANUFACTURING BUDGET. AI-POWERED ERP SOFTWARE CAN HELP REDUCE LABOR COSTS AND INCREASE PRODUCTIVITY BY PREDICTING EMPLOYEE PRODUCTIVITY, IDENTIFYING TRAINING NEEDS, AND OPTIMIZING SCHEDULING.

9. Labor Shortages

AI can even help with labor shortages through robotic automation, additive manufacturing, and machine vision. AI applications enable robot arms to safely handle objects on the production line regardless of their orientation, speed, or placement. With these abilities, robots can be trained to perform various types of assembly line work done by humans.

Assembly line work is repetitive, labor intensive, and prone to error. Even with years of experience, highly skilled designers and engineers often use a "best guess" approach when creating design solutions. AI empowers the development of complex, highly optimized designs that can be accurately produced with 3D printing. AI-driven autonomous machine vision can count and track items, identify defects, and properly sort products using cameras and specific lighting conditions.

10. Autonomous Manufacturing

AI can be used to automate manufacturing processes, reducing the need for human intervention and increasing efficiency. AI robots tap into machine learning algorithms to automate repetitive tasks and decision-making. Robotic process automation can perform repetitive tasks like data entry and order processing, but it can also handle more complex tasks, such as spotting anomalies on the production line.

AI-powered robots can work side-by-side with humans. Autonomous mobile robots can transport packages within the warehouse, while collaborative robots (cobots) assemble products alongside humans on the production line. These factory robots combine the precision and efficiency of machines with the skills and intelligence of human operators, taking product quality to new levels.

Say Hello to Big Data

As with many industries, manufacturing has begun to gravitate toward Big Data. ERP made it possible for manufacturers to make data-based decisions by tracking large amounts of information. Big Data enables predictive forecasts regarding sales, pricing, material availability, and other key metrics. AI makes gathering and analyzing those mountains of data provided by ERP possible.

The complexity of AI algorithms can be daunting. Yet, their ability to look into the future as well as today and the past are mind-boggling and exciting.

John Davis serves at CTO for Global Shop Solutions and is a 20-year veteran of the ERP and manufacturing industry. As a graduate of Utah State University, Davis is exceptionally gifted at building ERP software that simplifies manufacturing for Global Shop Solutions customers.

About Global Shop Solutions

We simplify your manufacturing.™ Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time, every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and nearly 30 industries. For more information please visit globalshopsolutions.com.

3I INFOTECH EXPANDS NURE PARK, TIRUNELVELI INITIATIVE TO A GLOBAL SCALE

From Local to Global - A revolutionary skilling initiative by 3i Infotech

3i Infotech, a global IT company committed to accelerating growth and business transformation launched its pioneering initiative NuRe Park in 2022 as a beacon of innovation and incubation in Tirunelveli, a city known as the Cambridge of Tamil Nadu. Since then, NuRe Park has emerged as a trailblazing hub of skilling innovation and a global lab ground for transformative education.

On the back of the success of this initiative in India, 3i Infotech has furthered its commitment towards generating global value by creating an opportunity for the learners across the globe to train themselves in cutting-edge emerging technologies. Currently, the company has replicated and propagated this innovative model to other international markets where there is an inherent demand for it. The virtual program is underway in the United Kingdom, with a future vision to expand it to US, Malaysia, and the rest of APAC.

In the United Kingdom, the entity 3i Infotech UK is training local students for job readiness across Healthcare, Retail, Banking sector and more. The students are offered certifications and internships through their virtual training platform - NuRe Academy where the CoE's for Oracle and Microsoft also offer certification courses for industry fitment. Additionally, through this global outreach, 3i Infotech aims at building itself a state-of-art talent pool across the world to ensure its robust technological ecosystem.

Speaking on World Youth Skills Day 2023, ***Ms Rangapriya Goutham, Chief Marketing Officer, 3i Infotech expressed,*** "The evolution of NuRe Park's Campus-to-Corporate Connect program has grown from strength to strength, expanding its services to global customers across various domains. We are committed to delivering merit for the passionate individuals who are willing to undergo comprehensive training to build their career in tech".

"We have successfully completed the initial phase of evaluating the testbed by selecting 60 talented individuals from engineering colleges in and around Tirunelveli. These individuals underwent comprehensive training in soft skills and effective communication and are now prepared to thrive in corporate environments. Building on the same, we aim to go global with our value for facilitating efficient learning environment", she added.

Mr Thompson P. Gnanam, Managing Director, and Global CEO, 3i Infotech said, "At NuRe Park, Tirunelveli, the transformational journey is not just about skill-building; it

also fosters personal and professional growth. State-of-the-art facilities and a vibrant work culture provides employees with an environment conducive to their success. We will continue to further a sense of belonging and camaraderie by constantly engaging in employee engagement activities, cultural programs, and support for NGOs, among others. The fact that we have achieved remarkable results of training in Tirunelveli has strengthened our goal to take this initiative global".

The graduates of NuRe Park have played a pivotal role in delivering services to over 14 global customers, utilizing their expertise in Oracle E-business suite, AWS, Azure, Oracle, NuRe Edge, and other Cyber Security technologies. They have also achieved remarkable feats in their respective fields.

At NuRe Park, the Oracle ERP division's team has also earned prestigious certifications from Oracle University, showcasing their expertise and commitment to excellence. The Cyber Security and Cloud Transformation teams also obtained certifications in their respective domains, further demonstrating their technical prowess. Apart from these, the graduates have obtained certifications from other renowned organisations like Stellar Cyber, Microsoft, and Amazon.

3i Infotech has also recently signed an MoU with SRM Valliammai Engineering College, Chennai as another step towards creating a channel that will facilitate the Campus to Corporate objective. The company will continue to remain committed towards shaping the future of talent development.

Thompson P. Gnanam_Managing Director & Global CEO_3i Infotech

Ms Rangapriya Goutham_Chief Marketing Officer_3i Infotech

About 3i Infotech

3i Infotech Limited incorporated in 1993 and headquartered in Mumbai, India, provides information technology services and software solutions. Since its inception the company has 25+ years of experience in delivering business value to its clients across multiple industry verticals. 3i Infotech has emerged as a leading name in propelling the current wave of digital transformation initiatives, with deep domain expertise across BFSI, Healthcare, Manufacturing, Retail, and Government sectors. The company currently stands with a strength of 8000 employees and over 500+ clients across the globe. It operates through three key segments, (1) Enterprise Services (includes ADMS, ISMS, Testing, Classic BPS, MVS etc.), (2) Professional Services (includes Human Capital Mgt. Services) and (3) Digital Business Services (includes IT & Digital Consulting, Application-Automation-Analytics (AAA), Digital Infrastructure Management Services (Digital IMS), CloudFirst, Oracle COE, Global Command Centre (GCC), Cyber SOC, Digital BPS, Cognitive Computing Services, 5G Lab as Service, Private 5G, IoT, Cyber Security Services, Secure Access Service Edge (SASE), AgriTech, Telecom Media Entertainment (TME), Edge Computing, Edge Analytics, NuRe Campus, FutureTech, etc.)

LEARNING TO STAY AHEAD OF THE CURVE: WHY TEAMS SHOULD VALUE LOW-CODE/NO-CODE TRAINING

Article by **Timo Schuette,**
Global Vice President SAP Product Learning CoE, SAP

Leaders across the globe have faced tough challenges in the first half of the year, from budget scrutiny amidst the recession to the rapidly changing artificial intelligence (AI) and technology landscape, all while trying to do the best for their employees as the Great Resignation becomes the Great Stay. Even the most traditional executives have realized that to thrive in the current business environment, departments must be examined and strategic changes must be implemented to strengthen the future of the company and, more importantly, support the workforce that fuels it through innovation at all levels of the organization.

However, this is much easier said than done. As leaders look to new initiatives to adapt, low-code/no-code stands out as a holy grail solution. Address the pervasive tech skills gap by bringing non-technical employees into the development and deployment process? Check. Identify an affordable way to leverage unique employee skill sets and integrate members from cross-team functions? Check. A new way to think about technical skills, freeing those in traditional developer roles to focus on creativity and innovation rather than execution? Check.

If you're considering what low-code/no-code could look like in the workplace, here are some central considerations to keep in mind and mistakes to avoid when integrating citizen developers into your workforce in effort to create a more innovative IT department.

Citizen Developers Are Not "Junior" Developers, They Have Their Own Unique Skill Set

Citizen developers, employees that utilize strategies to create new or change existing business applications without involving IT departments, often have nontraditional backgrounds, serving in roles like customer service, human resources, and project management, bringing a new wave of perspectives and ideas to the tech and service industry. While many may be inclined to view citizen developers as "junior" developers, this couldn't be further from the truth. Since citizen developers are connected to other parts of the business, they can provide insight and streamline processes

that developers alone are not involved in. Additionally, citizen developers shouldn't be considered a one-to-one replacement of developers. Though they can optimize specific business functions, they do not fix technical holes in the workforce.

Leveraging these unique talents has huge benefits for the entire team: reducing the heavy lift on developers by easing the skills gap, opening the path to new ideas and innovative strategies, and bringing diverse and new perspectives to an IT industry that typically lacks diversity. Acknowledging the benefits of their nontraditional skill set is key to reap the benefits of implementing low-code/no-code in the workforce, as it meshes a unique view on the needs of the business, creativity, and coding skills to drive innovation.

"

ONE THING IS CERTAIN: LOW-CODE/NO-CODE TOOLS, LIKE PLATFORMS BASED ON THE PRINCIPLES OF MODEL-DRIVEN DESIGN, AUTOMATIC CODE GENERATION, AND VISUAL PROGRAMMING, ARE UNLEASHING INCREASED INNOVATION, EMPOWERING THE WORKFORCE, AND HELPING TO ADDRESS SKILL SHORTAGES.

Generative AI Will Fuel Citizen and Professional Developer Roles, Leading to Increased Innovation

Gartner research shows that 61% of corporations have already implemented citizen development projects or plan to do so. This is great news, because as the skills gap continues to widen without an equivalent number of new graduates to fill the holes, citizen developers are the natural solution for any department. However, as more organizations get comfortable with these shifts, they will also need to navigate the rapid evolution of generative AI, which will take things one step further for both citizen and professional developers.

Generative AI is continuing to evolve – and it makes the complexity of coding more accessible. In this sense, it is a low-code tool. Citizen developers will be able to leverage generative AI platforms to complete even more complex initiatives, which will free up the deeply technical computer and data scientists to focus on issues that require an in-depth understanding of how the systems work. With citizen developers able to flex their skills by assisting IT teams and traditional developers focused on strategic advancements, organizations are sure to see an improvement in productivity and employee satisfaction. One thing is certain: low-code/no-code tools, like platforms based on the principles of model-driven design, automatic code generation, and visual programming, are unleashing increased innovation, empowering the workforce, and helping to address skill shortages.

The Best Part about Low-Code/No-Code? The Opportunities Are Endless

The barriers to teaching and integrating low-code/no-code are relatively low, and any employee from any background – formally educated or not – can begin their coding journey with ease. Providing access to learning and development opportunities like low-code/no-code trainings opens new career opportunities for the existing workforce, encouraging workers to tap into their personal interest in learning developer skills while taking on a more expansive role in the organization. When employees feel that their interest in expanding their role and learning new parts of the business is being listened to, they also take on an increased sense of fulfillment and interest in the job, leading to heightened employee retention.

It may seem intimidating to start the journey of prioritizing new learning and training opportunities, but the benefits are endless. At our recently held SAP Builder Day, interested participants from across industries were able to learn the concept of low-code software development through hands-on experience. Learners created full end-to-end processes that integrated with SAP S/4HANA, using SAP Build Apps, SAP Build Process Automation, and SAP Build Work Zone. Through this program, dozens of workers were able to expand their technical knowledge and dive deeper into the world of low-code/no-code.

To begin implementing low-code/no-code strategies in your department, consider leveraging training for all levels – from beginner to advanced – and build time into the workday for those who are interested in learning. Putting an emphasis on this opportunity, and on the learning and development of your employees, is sure to make an impact on your teams.

The Future of IT Is Rapidly Changing, But Shining Bright

As technology continues to rapidly evolve, it's essential that IT teams are properly equipped to grow alongside it. With low-code/no-code and the rise of the citizen developer, the opportunities are limitless to what the technical workforce can accomplish, with employees of every background poised to get involved in the digital transformation across the industry. Not only will integrating citizen developers into your teams allow your organization to diversify its workforce, but it can also create new innovations in your strategy and address the employee burnout and stress on developers who cannot keep up with the growing skills gap.

About SAP

SAP's strategy is to help every business run as an intelligent, sustainable enterprise. As a market leader in enterprise application software, we help companies of all sizes and in all industries run at their best: SAP customers generate 87% of total global commerce. Our machine learning, Internet of Things (IoT), and advanced analytics technologies help turn customers' businesses into intelligent enterprises. SAP helps give people and organizations deep business insight and fosters collaboration that helps them stay ahead of their competition. We simplify technology for companies so they can consume our software the way they want – without disruption. Our end-to-end suite of applications and services enables business and public customers across 25 industries globally to operate profitably, adapt continuously, and make a difference. With a global network of customers, partners, employees, and thought leaders, SAP helps the world run better and improve people's lives. For more information, visit www.sap.com.

Sage

GENERATIVE AI IN 7 EASY STEPS: A PRACTICAL BUSINESS GUIDE

Article by **Asavin Wattanajantra,**
Business Writer and SMB expert

Practical steps outlining a pathway to navigate your generative AI journey.

Rapid advances in generative AI present both opportunities and challenges for your business.

Your emphasis should be on how AI can augment human capabilities rather than replace them. Despite apprehensions surrounding AI, focus on its advantages.

At London Tech Week, Microsoft UK CEO Clare Barclay, said that 64% of workers don't have the time and energy to do their jobs, according to the company's Work Trends Index. In these hustle-focused times, it's rare to see people unchallenged with burnout because the pace of work doesn't keep up with our human ability to keep up.

"We call this deluge of information digital debt," she said. "It saps energy, slowing down the ability to think clearly, which severely impacts thinking for innovation."

"Business leaders feel it and recognize it in their employees. They are less interested in using AI to cut jobs and instead value helping employees be more productive and focus on more meaningful work. It can also provide well-being benefits."

Seeing AI as a co-pilot can significantly boost productivity—often by as much as 30 to 40%. It's a prime opportunity to empower your employees with AI "superpowers" to help them succeed.

Here are 7 practical steps outlining a pathway to navigate your generative AI journey.

-
- Make customer needs your north star
- Use data to enhance customer experiences and address pain points
- Trust—build in a robust framework
- Augment the creativity of your people
- Understand the technical feasibility of generative AI
- Use incremental deployment
- Continuously learn and develop

1. Make customer needs your north star

Customers are the lifeblood of any successful business. Listening to your customers is crucial to stay ahead of the competition and drive growth. Customer feedback and preferences can provide key insights into how you can better tailor products or services to meet their needs with generative AI.

Speaking at a London Tech Week panel, AI tech entrepreneur and board member Nathalie Gaveau said: "Always start with the customer in mind. Consider their needs as your north star. How does your customer experience compare with the best in the world?"

Nathalie said businesses should understand metrics such as Net Promoter Score (NPS), which tracks customer satisfaction. NPS asks customers to rate the likelihood of recommending your product or service to others.

NPS can help you analyze customer responses to gain a holistic understanding of their behavior, which can help you refine business strategies accordingly.

By building generative AI models grounded in customer needs, you can steer your business towards increased customer satisfaction and loyalty, ultimately growing customer lifetime value.

Nathalie added: "CEOs must understand which areas of their businesses are being disrupted by AI. Two areas ripe for AI integration are coding and customer service. I've seen substantial productivity improvements in companies that have piloted AI in these areas.

"Engage your board and leadership team in discussions about investment in AI, considering your company's maturity and capital allocation strategy."

> **WE AREN'T CRAFTING AI SOLUTIONS IN SEARCH OF PROBLEMS, BUT RATHER TREATING GENERATIVE AI AS A TOOL TO ENHANCE CUSTOMER EXPERIENCES AND SOLVE PROBLEMS MORE EFFICIENTLY.**

2. Use data to enhance customer experiences and address pain points

Encourage your team to make the most of data from various sources. Customer feedback, social media, and purchasing behavior will give deep insights into customer needs, preferences, and pain points.

You want to incorporate those insights to create personalized generative AI experiences that delight and retain customers. Additionally, it could position you to address potential issues proactively, further fostering customer loyalty.

Kate Janssen is the senior product manager for machine learning and chat at Cleo, speaking in the same panel as Nathalie at London Tech Week. She said: "Product managers aim to create solutions that address customer needs and serve business objectives.

"We aren't crafting AI solutions in search of problems, but rather treating generative AI as a tool to enhance customer experiences and solve problems more efficiently."

Kate said that instead of asking how you can use generative AI, you should be asking how to use it to make your customer journey smoother and more delightful.

She advised: "If generative AI aids in achieving that, fantastic. If not, forcing it into the equation isn't necessary.

"Always let the customer problem guide your application of AI and not vice versa. It's not about shoehorning AI into your product, but about using it to enhance your solution where it makes sense."

Kate also pointed out that understanding your customers' perceptions of generative AI is key.

"If your target audience harbors fears about AI's data usage or the security of their proprietary information, then an educational component may enhance product acceptance."

3. Trust—build in a robust framework

You earn trust with customers, stakeholders, and partners through consistent actions and transparency. Embrace the responsibility of ensuring generative AI reliability and take proactive steps towards mitigating risk.

Build a solid framework that instils trust and verifies the accuracy of AI-generated outcomes. Here are some tips on doing just that:

- Start by evaluating existing AI processes and identifying potential vulnerabilities.
- Take a proactive approach to understanding potential risks with generative AI, such as biased or incorrect outputs, and develop strategies to address them.
- Implement robust data quality controls and validation processes to ensure the accuracy and reliability of the data used in AI models.
- Review and update your framework to align with emerging best practices and industry standards.

Kate Janssen said: "CEOs and leaders should seize the opportunity to provide guidance and context, rather than exercising control over AI applications.

"These tools can significantly increase productivity, but their usage should align with your organization's risk appetite and data privacy policies.

"To ensure the right balance, it's crucial for leaders to communicate what types of data employees can safely share or use in applications like ChatGPT.

"Creating a safe space for dialogue is key. For example, leaders could establish regular meetings or dedicated digital channels where employees can clarify doubts about data usage.

"In this environment, it's important that leaders demonstrate their usage of AI applications for productivity gains, such as email drafting or content creation.

"This hands-on approach will likely foster a more accepting and forward-thinking culture."

Involve legal experts if necessary

Legal compliance is a critical aspect of trust and verification in generative AI. Engage legal experts to assess compliance requirements and mitigate potential legal pitfalls.

Get the help you need to navigate the complex regulatory landscape and ensure your AI systems adhere to ethical standards and data protection laws.

By involving legal experts from the outset, you can establish a strong foundation of compliance, building trust with customers, stakeholders, and regulatory bodies.

> **ENCOURAGE TEAMS ACROSS THE ORGANIZATION TO EXPERIMENT WITH GENERATIVE AI TOOLS FOR TASKS LIKE INTELLIGENT DOCUMENT SEARCH AND CONTENT GENERATION.**

Nathalie Gaveau said: "Agility often brings new risks. It's essential to create a reliable framework that ensures no single point of failure, adds redundancy, and mitigates risks in your organization.

"Compliance should be top of mind, and involving lawyers in risk assessment can be immensely beneficial. However, practicality is key because risk profiles are continually evolving."

AI advisor and startup investor Haibo E says that it is essential to remember that machine learning is a systems problem.

She said: "If you decide to integrate machine learning into your customer propositions, you must examine your entire organization.

"Consider everything from legal implications and data IP concerns to new tech stack requirements and the emerging field of machine learning ops.

"Significant changes might be costly and will certainly require capital investment. But if you're committed to taking this bold step, make it decisively and from the top.

"It's an exciting new era, and the benefits can be transformative with the right approach."

4. Augment the creativity of your people

In the AI era, the roles and capabilities of your employees could transform.

It's important to recognize the unique strengths that AI brings to the table, such as generating insights and automating repetitive tasks.

By understanding the augmenting power of generative AI, you can empower your employees to take on new responsibilities and focus on critical and creative tasks that require a human touch.

Nathalie Gaveau believes that how you manage people in an era of augmented capabilities must evolve.

She said: "Regardless of the system you're using, understand that your employees are not just ordinary people, but 'augmented' individuals who can code, create videos, or perform tasks beyond their traditional roles."

She recommended implementing a bottom-up strategy: "Create a secure sandbox loaded with user-friendly, no-code applications.

"Encourage teams across the organization to experiment with generative AI tools for tasks like intelligent document search and content generation.

"You'll be surprised at how quickly some teams will outpace others in leveraging these technologies, accelerating the transformation, ideating new products, and leading pilot projects.

"This approach requires a robust framework and expert tech teams, but it can powerfully speed up your organization's transformation."

Kate Janssen agreed: "Fostering a safe, sandbox-like environment with clear guardrails enables employees to interact with AI applications confidently, increasing productivity while ensuring data security."

Hire and retain skilled individuals

To fully take advantage of the power of generative AI technologies, it's crucial to identify and nurture talent capable of using it to its full potential.

- Build a growth mindset within your business, where employees embrace the opportunities provided by AI and continuously develop new skills to stay relevant and thrive in this changing landscape.
- Provide training and upskilling opportunities to equip your employees with the knowledge and skills to use generative AI effectively.

In the competitive AI landscape, hiring and retaining skilled individuals is key to staying ahead.

- Look for individuals with a passion for learning and a curiosity to explore new technologies, demonstrating technical expertise and a creative mindset.

A supportive work environment rewards innovation, collaboration, and personal growth.

- By having a team of skilled individuals who understand the potential of generative AI, you can drive innovation, enhance productivity, and maintain a competitive edge in your industry.

5. Understand the technical feasibility of generative AI

Embracing generative AI holds tremendous potential for your business, but it is crucial to understand the technical feasibility before diving in. Keep an open mindset and seek the support of experts and resources

Let's explore practical steps to assess the technical feasibility of generative AI and set your business up for success.

Consider costs

Integrating generative AI involves various costs to be mindful of. Understanding the finances allows you to plan your budget effectively and make informed decisions about resource allocation.

- Begin by evaluating API charges, as they can vary depending on usage and customization
- Research different providers to select one that aligns with your budget and offers the necessary features.
- Consider hosting expenses, as AI models may require substantial computational power.

Kate Janssen said: "When it comes to cost, it's crucial to consider the potential expenses involved. There are charges associated with open models like OpenAI's APIs, which you must factor into your company's unit economics.

"For startups and smaller companies, hosting these models can be quite costly, running into thousands of dollars monthly. Therefore, it's important to consider your use case and the business viability of AI integration.

"If AI is at the heart of your product, you must carefully calculate how these costs will affect your margins. Concessions will be inevitable."

> **INTEGRATING GENERATIVE AI INVOLVES VARIOUS COSTS TO BE MINDFUL OF. UNDERSTANDING THE FINANCES ALLOWS YOU TO PLAN YOUR BUDGET EFFECTIVELY AND MAKE INFORMED DECISIONS ABOUT RESOURCE ALLOCATION.**

Evaluate business viability

When assessing the technical feasibility of generative AI, it's essential to evaluate its business viability based on unit economics and margins.

Evaluating potential benefits against the costs incurred will give you a clearer picture of AI's value to your business. AI integration must align with your long-term business goals.

Conduct a thorough analysis of your financials, considering factors such as projected revenue growth, return on investment, and market demand.

- How will generative AI impact your workflow and processes?
- Will generative AI enhance operational efficiency, streamline decision-making, or improve customer experiences?

If you're interested in building a generative AI-enabled product, Kate Janssen advises: "It's essential to make it defendable in the marketplace.

"Consider what makes your product unique and compelling—is it the algorithms, distribution strategy, or data? Remember, your competitors have access to the same tools, so how will you differentiate your product and maximize its value?"

Address latency challenges

Latency, or delays in AI processing, can impact the user experience and undermine the benefits of generative AI.

It's crucial to address potential challenges related to latency to maintain a seamless user experience.

- Evaluate your infrastructure and determine if your current systems can handle the increased computational demands of AI.
- Consider implementing load balancing or distributed computing strategies to improve response times.
- In cases where real-time AI processing is critical, explore edge computing solutions that allow you to deploy AI models closer to end users.

By proactively addressing latency challenges, you can ensure that your generative AI applications deliver the desired outcomes without compromising user satisfaction.

Kate said: "If you've used AI systems before, you've likely experienced a time when the service was unavailable or response times were slow.

"When considering the use of an API, you need to consider the potential for slow response times or periods of unavailability.

"What does that mean for your customer experience? How will you maintain their engagement during these times?

"User interface design can greatly enhance the user experience during these latency periods, but developing a plan to address these inevitable challenges is vital."

Highlight the need for redundancy and continuous monitoring

Redundancy and continuous monitoring are key to ensuring reliability in generative AI systems.

Build redundancies within your infrastructure to avoid single points of failure. Have multiple AI models running simultaneously or implement fail-safe mechanisms.

Consider establishing robust monitoring processes to detect anomalies and errors in real time. Continuous monitoring allows you to identify and address issues promptly, minimizing potential risks and instilling confidence in the reliability of your AI systems.

6. Use incremental deployment:

When it comes to integrating generative AI into your business, taking an incremental approach can lead to greater success and minimize potential risks.

Following the "crawl, walk, run approach", incremental deployment empowers you to harness the potential of generative AI while minimizing risks.

Crawl: Rapid prototyping and testing

The crawl phase is the first step in your journey towards generative AI integration. This phase involves rapid prototyping and testing to validate ideas and gather feedback from alpha and beta user groups.

This approach allows you to understand the capabilities and limitations of generative AI within a controlled environment and sets the stage for future growth.

- Start by identifying specific areas or use cases where generative AI can bring value to your business.
- Develop a minimum viable product (MVP) that showcases the potential benefits of the technology.

The next stage is gathering feedback from a select group of users and incorporating their insights to refine and iterate on your prototype.

Walk: Iterative development and scaling

Once you've refined and validated your initial prototype, you move on to the walk phase.

This approach allows you to build confidence in the capabilities of generative AI while delivering value to your users.

This phase focuses on iterative development and scaling your generative AI solution.

- Expand your user base beyond the alpha and beta groups, gradually increasing the scope and complexity of your implementation.
- Continuously gather user feedback and use it to drive further enhancements and optimizations.
- As you iterate on your generative AI solution, ensure transparency by documenting the changes, communicating updates to stakeholders, and addressing any concerns.

Run: Full-scale deployment and continuous improvement

With a solid foundation established through the crawl and walk phases, it's time to accelerate towards full-scale deployment. During this run phase, you will expand the adoption of generative AI across your organization or user base.

- Monitor key performance indicators to measure the impact and effectiveness of your implementation.
- Regularly evaluate the fairness and accountability of your generative AI system to ensure ethical practices.
- Implement mechanisms for continuous improvement, leveraging user feedback and insights to refine your solution over time.
- Maintain a commitment to transparency, fairness, and accountability to build trust and confidence in the benefits and outcomes of generative AI.

Staying at the cutting edge is critical because what makes you competitive may be easily replicated. But that fear should keep you on your toes and drive innovation.

Yuelin Lee is the chief product officer at the identification verification company Onfido. At London Tech Week, she said: "While the advent of these new AI tools initially excited us and led us to plan a hackathon, we had to reassess.

"While exploring non-critical applications of these tools today is important, a more cautious approach is required when embedding them into core products. We need to set up proper gateways and systems before leaping.

"Our approach mirrors the 'crawl, walk, run' mantra. We're already running regarding our core products but still learning to crawl or walk in other areas. We prioritize caution and structure, not haste, as we progress with generative AI."

7. Continuously learn and develop

Continuous learning and innovation are the fuel that powers success. Developing a growth mindset and embracing the opportunities of staying at the cutting edge is crucial.

Spark innovation with novel applications of generative AI

Generative AI holds immense potential to revolutionize industries and unlock novel applications.

Encourage a culture of innovation by exploring how generative AI can positively impact your business.

Seek fresh perspectives and ideas from your team and empower them to experiment and think outside the box.

By embracing the power of generative AI to solve problems, improve processes, and enhance customer experiences, you can drive innovation and set yourself apart from the competition.

"

OUR APPROACH MIRRORS THE 'CRAWL, WALK, RUN' MANTRA. WE'RE ALREADY RUNNING REGARDING OUR CORE PRODUCTS BUT STILL LEARNING TO CRAWL OR WALK IN OTHER AREAS. WE PRIORITIZE CAUTION AND STRUCTURE, NOT HASTE, AS WE PROGRESS WITH GENERATIVE AI.

Cultivate agility and adaptability for success

In a rapidly changing world, agility and adaptability are key attributes for success. Foster a culture that embraces change and encourages flexibility.

Stay attuned to emerging technologies and emerging trends that have the potential to disrupt your industry. Be open to embracing new tools, methodologies, and ways of working.

Encourage your team to be nimble in responding to challenges and to view them as opportunities for growth and improvement.

Yuelin Lee says of cultivating a growth mindset: "Being open to change and adaptation becomes crucial.

"In practice, this means empowering your teams. Top-down directives about what to do may not always be the most effective approach. Instead, giving your team the space, time, energy, and desired outcomes can spur innovation.

"The best ideas often arise not from top-down mandates but from empowered teams—experimenting, playing around, learning from peers and customers.

"Rather than being driven by fear and feeling the need to act because something is changing or appears threatening, adopt a mindset of exploration.

"Acknowledge the change, create guardrails for safety, and allow room for innovation and experimentation. This approach manages the risks involved and fosters a culture of innovation and creativity."

Final thoughts on practical ways to use generative AI

First and foremost, always prioritize customer needs as your guiding star. By understanding their pain points and leveraging data to enhance their experiences, you can deliver personalized solutions that truly resonate.

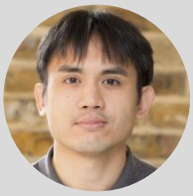
Building trust through a robust framework ensures the responsible and ethical use of generative AI, fostering customer and employee confidence.

Furthermore, don't overlook the invaluable human touch. Augmenting the creativity of your people with generative AI tools can lead to innovative breakthroughs and new avenues for growth. However, it's crucial also to understand the technical feasibility of adopting AI solutions, ensuring they align with your business goals and resources.

Embracing incremental deployment allows for a smoother integration of generative AI into your existing processes, mitigating risks and facilitating a seamless transition.

Finally, remember that the learning journey doesn't end with implementation. Continuously learning and developing your AI capabilities will empower your organization to adapt to emerging trends and stay at the forefront of innovation.

By embracing these practical steps, you will unlock the full potential of generative AI, driving efficiency, creativity, and customer satisfaction.



Asavin is a seasoned business writer and SMB expert at Sage, with a passion for explaining, analyzing, reporting, and providing advice on the latest business technology and innovation trends. With over 15 years of experience as a business writer, Asavin has developed a keen eye for identifying the most important insights and trends impacting small and medium-sized businesses. His expertise extends from side hustles and e-commerce to scaling SaaS businesses and AI, making him a go-to source for insights into the rapidly evolving SMB landscape. Prior to joining Sage, Asavin worked as a technology journalist and later moved on to agencies servicing top tech brands such as Microsoft, Intel, SAP, Dell, Adobe, and BAE. His work has been featured in leading technology and business publications. Asavin combines his deep love and understanding of technology with storytelling and business writing skills to deliver compelling insights that help SMBs thrive in today's fast-paced corporate environment.

About Sage

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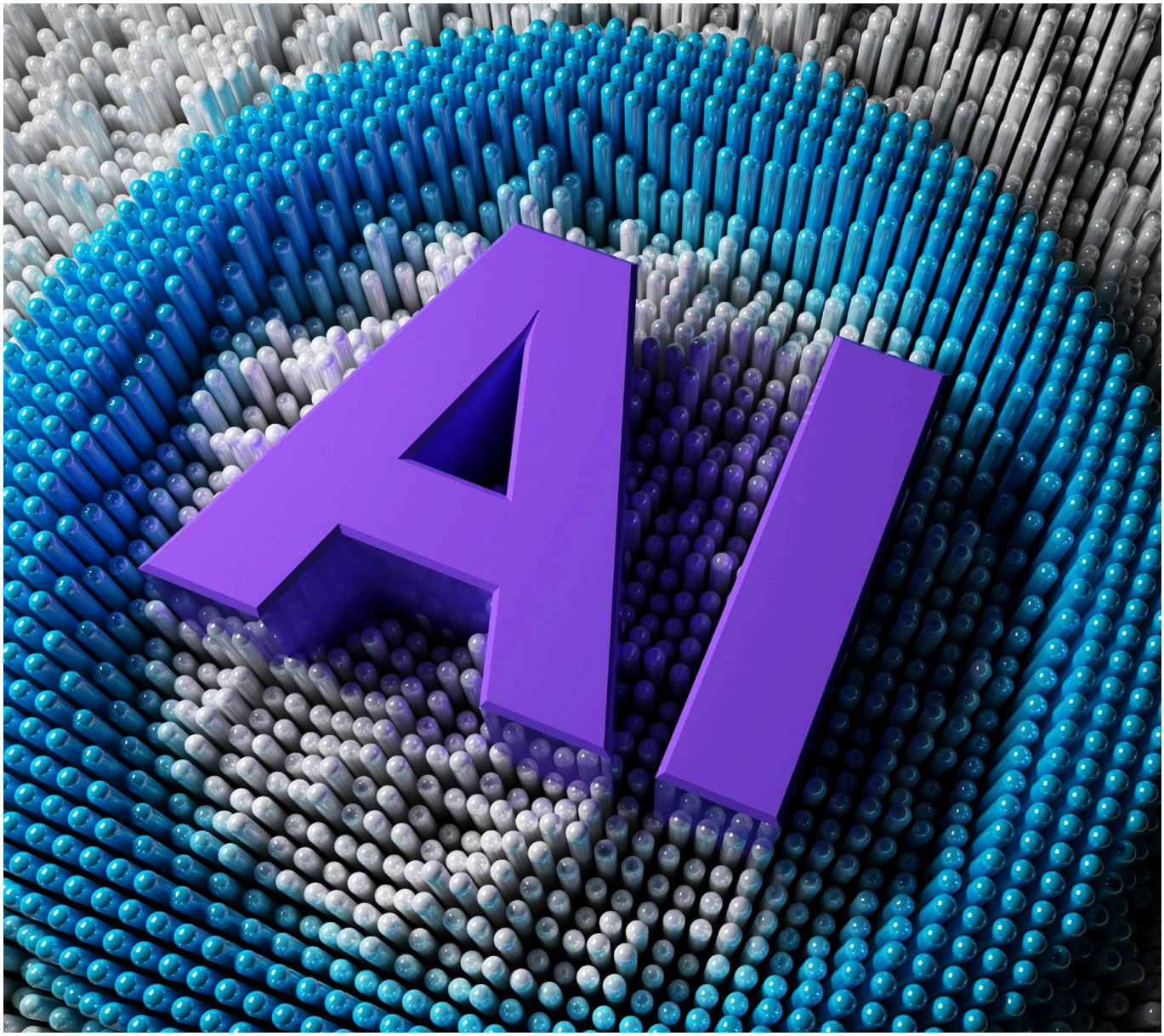

SALESFORCE SUPPORTS AI REGULATION ADVANCING DIGITAL TRUST AND INNOVATION

Article by **Eric Loeb,**
Executive Vice President, Government Affairs, Salesforce

AI, especially generative AI, is the next seismic technology shift – on the level of the internet and mobile. But new technology has its limits, and can lead to a wide range of risks, including issues of accuracy, bias and inequality, privacy and security, and sourcing of content.

As companies rapidly move forward and gain productivity with AI, trust must be the top priority. That's why, earlier this year, Salesforce released five guidelines for responsible generative AI development to provide tips to address trust concerns.

In addition, Salesforce supports tailored, risk-based AI regulation that differentiates contexts and uses of the technology and ensures the protection of individuals, builds trust, and encourages innovation.

Making AI accessible, trusted, and ethical

A tailored approach is key: A one-size-fits-all approach to regulation may hinder innovation, disrupt healthy competition, and delay the adoption of the technology that consumers and businesses around the world are already using to boost productivity.

A tailored approach is key: A one-size-fits-all approach to regulation may hinder innovation, disrupt healthy competition, and delay the adoption of the technology that consumers and businesses around the world are already using to boost productivity.

For example, while Salesforce encourages responsible AI development for all use cases, a small team of engineers developing a generative AI chatbot to teach college students to cook should have fewer guardrails and oversight than healthcare providers using AI tools used to help diagnose patients and develop care plans.

> **AI IMPACT ASSESSMENTS ARE ONE WAY TO PROMOTE ACCOUNTABILITY AND TRUST WITH HIGH-RISK AI SYSTEMS. LICENSES OR NOTIFICATIONS CAN SERVE A USEFUL ROLE WITH ACCOUNTABILITY AND COMPLIANCE, BUT SHOULD BE IMPLEMENTED THROUGH A RISK-BASED APPROACH, AND BALANCE COMPLIANCE WITH MARKET ENTRY, COMPETITION, AND INNOVATION.**

Salesforce commends policymakers who apply a nuanced approach when developing regulation, and to consider the following concepts to help society navigate this important moment:

1. ***Risk-based framework:*** The context in which technology is used matters, and some industries, like healthcare, are more likely to create higher risks for their users and society than others. Risk-based AI regulation would focus most on high-risk applications, especially those with legal, financial, and ethical implications that could cause significant harm or impact someone's rights and freedoms.

2. ***Differentiation based on context, control, and use:*** Regulation should differentiate the context, control, and uses of the technology and assign guardrails accordingly. Generative AI developers, for instance, should be accountable for how the models are trained and the data they are trained on, while those deploying the technology decide how the tool is being used and should establish rules governing that interaction.
3. ***Data privacy laws:*** Data protection laws that protect the fundamental human right to privacy are a foundation of responsible AI regulation. AI is powered by data. Additional rules specific to generative AI should address the use and privacy of personal data for training future models, safeguarding personal data within the AI ecosystem.

4. ***Transparency:*** AI systems might operate as "black boxes," making it difficult to understand their decision-making processes. Individuals should be informed of and empowered to understand the "why" behind AI-driven recommendations, and they should be aware if they are interacting with a human or a simulated persona.

5. ***Accountability and government oversight:*** AI impact assessments are one way to promote accountability and trust with high-risk AI systems. Licenses or notifications can serve a useful role with accountability and compliance, but should be implemented through a risk-based approach, and balance compliance with market entry, competition, and innovation. That's why risk management frameworks like those shared by NIST will bring a foundational understanding to the field.

6. ***Harmonization and consistency with existing rules:*** Many existing laws and policies already provide some guardrails around AI, such as global data protection laws. As regulators and other stakeholders develop new guidance, they should assess and clarify whether there is an existing law addressing these concerns.

7. ***Future-proof and universal applications:*** Given the pace of innovation, AI regulations should be globally interoperable, and be both durable and flexible. The regulations should provide a policy framework for the ethical development and deployment of AI systems, rather than focused on a specific technology at a specific time.

Governments, industry, academia, and civil society need to work together

AI is a critical and rapidly-evolving issue in society, and Salesforce is proactively engaging with governments and all stakeholder groups to advance responsible, risk-based, and globally applicable AI norms.

- Salesforce supports governments and industry partnering together, like the work occurring in the G7 and the longstanding AI work of the Organization for Economic Co-operation and Development (OECD).

- In the United States, Salesforce submitted comments to the U.S. National Telecommunications and Information Administration (NTIA) AI Accountability Policy docket and to the U.S. Office of Science and Technology Policy (OSTP).

- In the European Union, Salesforce welcomes the continued progress on the EU AI Act and strongly recommends that the risk-based approach is reflected in the Act's final text.

- Salesforce has also pledged to invest $4 billion in its UK business over the next five years to support AI innovation.

- Salesforce representatives are actively participating in multi-stakeholder discussions through the U.S. National AI Advisory Committee, the Singapore Advisory Council for the Ethical Use of AI, Singapore's AI Verify Foundation, and the U.S. Chamber of Commerce Artificial Intelligence Commission.

Salesforce is committed to building trusted, transparent, and accountable AI systems that prioritize fairness, accuracy, privacy, and positive societal impact, and will continue this commitment as the technology continues to advance.

About Salesforce

Salesforce, the global CRM leader, empowers companies of every size and industry to digitally transform and create a 360° view of their customers. For more information about Salesforce (NYSE: CRM), visit: www.salesforce.com.

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WHERE DID MY OEE GO?

The manufacturing industry is driven by efficiency and productivity, and the search to fulfill these goals requires KPIs that light the way for improvement. One of the key metrics used to measure the performance of manufacturing equipment is Overall Equipment Effectiveness (OEE).

What is OEE?

OEE is a metric that measures the effectiveness of manufacturing equipment by comparing the actual production output to the maximum possible production output.

OEE is calculated by multiplying Availability, Performance, and Quality:

- Availability is measured by the percentage of time the equipment is available for production.
- Performance is measured by the rate of maximum production speed achieved by the equipment.
- Quality is measured by the percentage of defect-free products produced by the equipment.

How Machine Data Impacts OEE

Machine data plays a crucial role in calculating OEE. Machines generate vast amounts of data during production, including uptime, downtime, speed, performance, condition, and quality. This data is captured by sensors and stored in the machine's control system. By analyzing this data, manufacturers can identify trends in machine performance, optimize production processes, and improve OEE.

How Machine Data Impacts Areas Related to OEE

Quality is another critical factor in OEE. High-quality products are essential for customer satisfaction and brand reputation. By monitoring quality data in real time, manufacturers can identify issues and take corrective action before they impact production. This process reduces the likelihood of defects and improves OEE; the need to rerun production to replace scrapped and defective parts decreases.

Inventory management impacts OEE as well. Maintaining optimal inventory levels ensures production lines operate at maximum capacity. Overstocking can lead to waste and increased costs, while understocking can cause production delays and downtime. By using software that leverages real-time data and analytics, manufacturers can optimize inventory levels and improve OEE.

OEE is also intricately linked to supply chain management. The same real-time data and analytics applied to other aspects of the operation empower planners to monitor the supply chain. With end-to-end visibility, they can take corrective action as or before problems arise, reducing the likelihood of production delays and downtime. They can also proactively enact quality and expiry protocols, manage vendor relations, and score supplier performance.

How to Improve OEE

To improve OEE, manufacturers need real-time data and analytical insights. A Manufacturing Execution System (MES) is a software platform that provides real-time visibility into production processes, allowing manufacturers to monitor machine data, quality, inventory, and the supply chain in real time.

MES software collects data from sensors and other sources, analyzes it, and provides insights that manufacturers can use to optimize their processes. They can identify areas for improvement and take corrective action quickly, improving OEE. This real-time visibility can be used to supply other software systems (SCM, CMMS, QMS, etc.) to extend its reach and impact to the benefit of OEE.

MES software also provides real-time insights into inventory levels, allowing manufacturers to optimize levels and reduce waste. As a result, they can keep their production lines running at maximum capacity, improving OEE.

Launch Your OEE to New Levels

Modern manufacturing requires complete visibility, access to real-time data, and advanced analytics extended across the entire internal supply chain. A best-in-class MES solution will help align and improve your processes and increase your OEE significantly.

"MES SOFTWARE COLLECTS DATA FROM SENSORS AND OTHER SOURCES, ANALYZES IT, AND PROVIDES INSIGHTS THAT MANUFACTURERS CAN USE TO OPTIMIZE THEIR PROCESSES. THEY CAN IDENTIFY AREAS FOR IMPROVEMENT AND TAKE CORRECTIVE ACTION QUICKLY, IMPROVING OEE.

About Plex

Plex, by Rockwell Automation, is a leader in cloud-delivered smart manufacturing solutions, empowering the world's manufacturers to make awesome products. Our platform gives manufacturers the ability to connect, automate, track, and analyze every aspect of their business to drive transformation. The Plex Smart Manufacturing Platform™ includes solutions for manufacturing execution (MES), ERP, quality, supply chain planning and management, asset performance management, production monitoring, process automation and analytics to connect people, systems, machines and supply chains, enabling them to lead with precision, efficiency and agility. To learn more, visit www.plex.com.

ORACLE NETSUITE

FEETURES HITS ITS STRIDE WITH NETSUITE

NetSuite Analytics Warehouse helps family-owned and operated sports apparel business understand sales trends and set performance records

Feetures, a leading performance sock brand, is working with Oracle NetSuite to achieve its mission to support runners and other athletes in the pursuit of healthy and active lifestyles. With NetSuite and NetSuite Analytics Warehouse, Feetures has been able to improve complex demand forecasting and gain actionable insights to expand its retail footprint and sell its products in over 50 countries. Founded in 2002, Feetures produces technically advanced socks to help runners perform at their best. It operates an ecommerce business, works with retailers including DICK's Sporting Goods, Nordstrom, and REI, and has a wholesale business that works with running, golf, and tennis specialty stores collectively generating $45 million annually. To meet increasing demand for its high-performance apparel and simplify its operations, Feetures needed to replace its QuickBooks and FishBowl systems with an integrated and scalable business platform. After careful evaluation, Feetures selected NetSuite as its new enterprise resource planning (ERP) system.

"We operate a complex business with multiple distribution channels and over one thousand SKUs of high-performance socks customized for practically every runner and activity," said Daniel Roath, IT manager, Feetures. "With NetSuite Analytics Warehouse, we have been able to consolidate all sources of data into a single repository and it helps us analyze and glean actionable information while saving time and eliminating manual tasks. With years of historical data, we are excited to finally be able to uncover product patterns and customer insights to drive better business decisions."

With NetSuite, Feetures has been able to consolidate, automate, and enhance its operations on an integrated business system. NetSuite Analytics Warehouse enables Feetures to quickly process data from Google Analytics, NetSuite, Shopify, and SPS Commerce and tease out near- and long-term trends in customer behavior, inventory, and financials. In addition, NetSuite Connector automatically transfers data between NetSuite and Shopify, making it easy to experiment with different SKUs and track trends to fuel sales strategy. To build on the success it has achieved with NetSuite, Feetures is exploring NetSuite Planning and Budgeting to further increase efficiencies by automating labor-intensive planning and budgeting processes, so that its finance team can quickly and easily produce budgets and forecasts.

"Feetures is helping runners and other athletes globally pursue healthy and active lifestyles and the success it has been able to achieve is very impressive," said David Rodman, senior vice president of customer success, Oracle NetSuite. "With NetSuite, Feetures has been able to gain a unified view of its business, streamline its financial operations, and understand the customer better. The insights and efficiencies delivered by NetSuite help the Feetures team stay focused on their goal of producing the best performance socks in the world."

About Oracle Netsuite

For more than 20 years, Oracle NetSuite has helped organizations grow, scale and adapt to change. NetSuite provides an integrated system that includes financials / Enterprise Resource Planning (ERP), inventory management, HR, professional services automation and omnichannel commerce, used by more than 27,000 customers in 215 countries and dependent territories. Learn more at https://www.netsuite.com. Like us on Facebook, and follow us on LinkedIn, Instagram, and Twitter.

MORGAN MOTOR COMPANY GOES LIVE WITH UPGRADE TO IFS CLOUD TO DRIVE EFFICIENCIES AND ENHANCE CUSTOMER EXPERIENCE

IFS solution supports sales, manufacturing, projects, purchasing, inventory and finance processes for specialist automotive brand

IFS, the global cloud enterprise software company, announced that British sports car manufacturer, Morgan Motor Company, has gone live with the IFS Cloud ERP software solution as it looks to drive operational efficiencies and improve the customer experience.

Morgan was looking for a solution that enabled it to coordinate its manufacturing, supply chain and spare parts requirements and deliver efficiencies across all its internal operational processes end-to-end. At the same time, it is continually launching new models, including the recent Morgan Super 3, and needed to ensure it was delivering the optimum purchasing and after-sales service to customers.

IFS Cloud is now driving operational efficiencies for Morgan Motor Company across its business processes. The enhanced flow of data it facilitates with customers strengthens decision-making and allows the manufacturer to hone its vehicle and service offerings to accurately meet customer needs.

As a long-term IFS customer, Morgan earned a place in the IFS Pioneer Program, an initiative for select IFS customers that, through enhanced technical support and consulting, offers an accelerated go-live on a new IFS Cloud version ahead of release to the wider market. Morgan Motor Company is now the first UK Pioneer Program customer to go live on the latest version of IFS Cloud.

Following the go-live, which took place seamlessly over a weekend, Morgan instantly had 160 users up and running on the solution, which currently supports sales, manufacturing, projects, purchasing, inventory and finance processes. The IFS R&D, global consulting and unified support teams are actively engaging with these users and facilitating the pioneer program and will provide ongoing support, including quickly escalating and addressing issues as and when required.

Daniel Godwin, Business Systems Development and Support (IFS), Morgan Motor Company, said: "In the current economic climate, specialist automotive manufacturers are having to manage the challenges of supply chain disruption, rising costs and the ongoing need to drive sustainability.

"We have been using and working with IFS for nearly ten years, and in that time, we have gained complete trust in them and their product. We know that with the help of their expert support and versatile technology, we will navigate a safe passage through these complex challenges.

"Using IFS Cloud will allow us to streamline our processes, improving operational efficiencies, and we can reduce costs by eliminating our onsite hosting expenses. Knowing that the solution is 'evergreen' means that we get regular updates and always have access to the latest functionality."

Looking to the future, Morgan is focused on ensuring IFS Cloud helps to complement and enhance its ongoing focus on environmental efficiency. By enabling the company to achieve greater visibility over its operations, IFS Cloud will help it deliver sustainability initiatives and better manage and measure its ESG performance.

Christian Pedersen, Chief Product Officer, said: "Morgan is a compelling blend of traditional craftsmanship with modern technology and innovation. The team is proud of its legacy and culture but is also committed to working with us to get the most out of the move to IFS Cloud and ensure we are constantly bringing in new capabilities and helping them build resilience within their business. We have built a great trust-based partnership with them and look forward to what the future relationship will bring."

About IFS

IFS develops and delivers enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers – at the Moment of Service. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector.

servicenow

CCBA TAKES OWNERSHIP OF ITS DIGITAL TRANSFORMATION JOURNEY

Market leadership across a continent

Coca-Cola Beverages Africa (CCBA) is Africa's leading soft drinks business. It already boasts impressive figures: 600,000 outlets served, 39 bottling plants, and a number-one position in most of the 14 territories where it operates.

The business believes it can do even better. Consumption levels across Africa are lower than in other parts of the world, and it has promised to invest further in distribution and marketing.

Brand awareness and product innovation will help drive growth, but the real opportunity for CCBA is in knitting together its broad business, finding new efficiencies, and raising productivity. The business has more than 20,000 employees across southern and eastern Africa, many of whom work remotely.

The challenge is to establish seamless, digital workflows across the organization. CCBA needs to track daily distribution and stock levels and sales teams need access to the latest customer data while working remotely. The group is in a constant state of onboarding new customers, outlets, and employees. The effective management of this complex, fast-changing IT environment is critical. CCBA took ownership with ServiceNow IT Service Management (ITSM), simplifying the management process and gathering the data to inform improvements.

Unifying IT service management

ServiceNow ITSM establishes a unified approach to IT processes. It consolidates two separate systems used in the South African business and in those across the Rest of Africa (ROA). Previously, with the service desk located in South Africa, employees calling from other countries across

Africa would require additional approval for international dialling, which created an extra layer of complexity and cost when logging tickets and getting the support they needed.

The ITSM implementation was conducted alongside ITC Infotech, a ServiceNow partner out of India. The project team comprised five heads from CCBA and four from ITC Infotech.

"We went from RFP to big bang deployment with all the necessary integrations within 180 days. It was seamless," recalls Jolene Coetzee Moolman, CCBA's IT Practice and Governance Manager. "We made sure to take ownership. We understood that this was our project, our business process. We didn't want to rely on a vendor to deliver the project in isolation."

After choosing ServiceNow and partner, ITC Infotech, from a host of vendors, Jolene and the ICT Infotech team participated in a five-day pre-design workshop in Bangalore, followed by a five-day design workshop in Johannesburg. "We quickly established that the quality of master data would make or break the deployment," Jolene recalls. "We launched big bang on the same day that the new Service Desk and Operations Center (SDOC) went live. This included: incident, request, change, problem, self-service portal, the mobile app, knowledge management, SolarWinds (used for Event Management), BizFrame (used for Asset Management to support the ServiceNow CMDB), and all associated notifications (push and email) and SLAs, OLAs, and UCs." At this time, CCBA also launched its contact center solution (Genesys) with integration into ServiceNow. "All vendors and internal resolvers were trained on the system and processes by the deployment team during the 180 days," says Jolene.

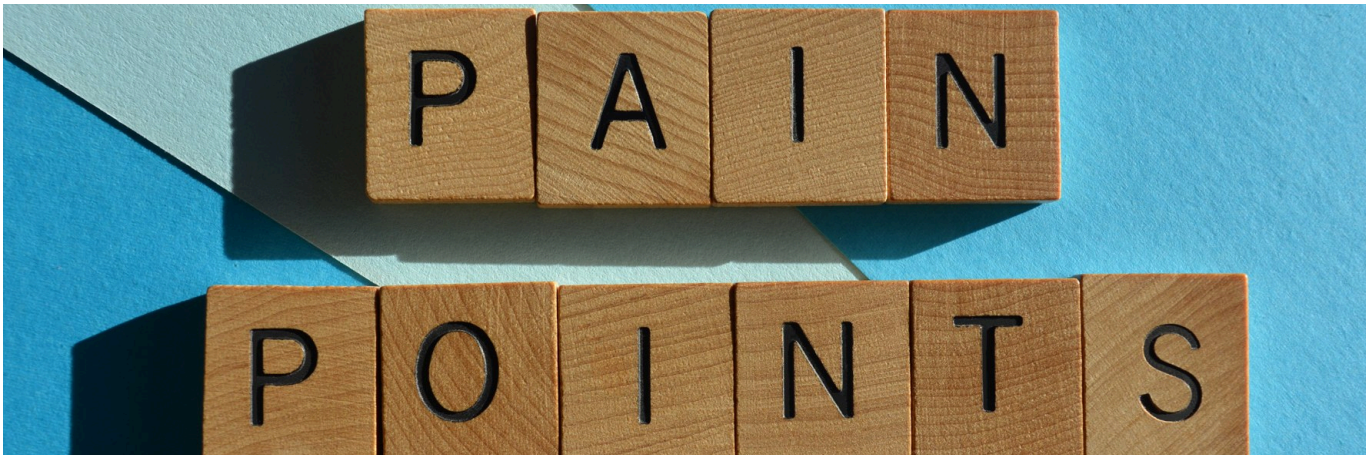
The engagement means CCBA has clearer visibility of its IT service function. There is a clear audit trail and a central hub for reporting. The business is better able to sift through data to spot emerging issues before they impact, for instance, tickets are auto logged when defined thresholds are reached and routed to support teams as needed. And the SDOC, which monitors the company's IT infrastructure in real time, facilitates the company's major incident process and associated business communications, limiting the need for business users to report major outages. Thanks to integrated ITSM processes, the SDOC has access to the FSC (forward schedule of change) to help identify, diagnose, and troubleshoot issues.

"Digitization is at the core of our business agenda," says Jolene. "ServiceNow enables us to harmonize and streamline processes, deliver rapid support, and take ownership of our master data."

This digitalization includes the launch of a new app for users to log issues and self-serve a range of tasks from any location, such as accessing live updates on ticket status and FAQs to self-sooth or resolve issues. This is a major advantage in areas with poor network connectivity or where there may be prohibitive telco charges.

About ServiceNow

ServiceNow makes the world work better for everyone. Our cloud-based platform and solutions help digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow.
For more information, visit www.servicenow.com.



GBR'S GREAT LEAP: A TECHNOLOGICAL EVOLUTION WITH ODOO

GBR International is a leading distributor of phones, tablets, and phone components in Egypt. Specializing in B2B channels, GBR not only sells these devices but also provides a repair service backed by solid warranty conditions. Having carved out a niche in the market, the company found itself facing operational challenges that needed a robust, integrated solution. This is where Odoo stepped in.

Pain Point: Streamlining Procurement to Payment Workflow

GBR's operation model involves minimal to no stock keeping. As such, they place orders based on customer needs, source components for repairs and distribution internationally, and manage long lead times from their local manufacturer. Further, as all phones/tablets are serialized for warranty purposes, tracking was crucial. Payment plans, shipping costs, bills and payments were also aspects that needed a system in place.

Odoo Solution: Master Data Centralization & Intelligent Tracking

To overcome these challenges, GBR employed Odoo's applications such as Purchase, Accounting, Inventory, Invoicing, and Studio. Phones and components were configured as unique products, and master data for products, contacts, and CoA were imported for easy access. Serialization tracking for products and landed costs were activated, creating a smooth and efficient workflow. Payment plans were crafted with vendors and bills were issued accordingly. The result? A well-tracked PO system and centralized data center, making procurement to payment a breeze.

Pain Point: B2B Sales and Repair Workflow

GBR's business model also includes B2B sales and repair services. They faced challenges in managing preset quotations, confirmation processes, payment terms, warranty agreements, and tracking receivables. They also provided consignment services and needed to invoice retail shops based on their usage of components.

Odoo Solution: Automated Sales, Invoicing & Repair Services

GBR took advantage of Odoo's Sales, Invoicing, Accounting, Inventory, and Studio applications. They created quotation templates, configured invoicing policies, and activated MTO route for PO creation. The consignment workflow was set up, and a system for tracking salespeople's performance was implemented. All these streamlined their B2B sales, made payment collections easier, and provided a seamless repair workflow.

Pain Point: HR Management

On the HR front, tracking employee time-offs, calculating payroll, managing loans and benefits, and handling employee expense reimbursements were all areas that needed improvement.

Odoo Solution: Efficient HR Operations

Odoo's Time-Off, Payroll, Attendance, Accounting, and Expenses apps helped GBR efficiently manage their HR tasks. Time-off types were created, contracts were imported, allowances were added, and salary structures were adjusted. An easy-to-use platform was provided to employees for leave applications and expense reimbursements. As a result, HR tasks became easier, transparent, and automated.

By implementing Odoo's comprehensive suite of applications, GBR International successfully transformed its operations. They managed to streamline workflows, centralize data, automate processes, and improve tracking and performance metrics. Through this journey, GBR and Odoo demonstrated how the right tools can significantly boost business efficiency and productivity. GBR is now positioned to confidently tackle the future, armed with the power of Odoo.

| About Odoo

Odoo is a leading provider of all-in-one, open source business software for small and medium sized businesses worldwide. Founded in 2005, Odoo thrives in a unique and fully open ecosystem combining the resources of its community and partners to deliver a full range of easy-to-use, integrated and scalable business applications. Odoo has offices in the U.S., Belgium, Luxembourg, India, Hong Kong and Dubai. For more information, please visit: www.odoo.com.

IFS ACQUIRES POKA

- IFS extends capabilities with Poka connected worker technology to empower factory and field workers to work smarter, safer and drive productivity and efficiency.
- The acquisition positions IFS as the only vendor with leading ERP, EAM and FSM capabilities now able to digitally connect workers across the end-to-end value chain in its core industries.

IFS announces it has signed a definitive agreement to purchase Poka, Inc. (Poka) the market leading Quebec based provider of a connected worker platform. Poka enables factory and field workers to be more efficient across all aspects of their jobs from training and development to troubleshooting. This capability enables businesses to measure productivity across machinery and operators globally and therefore provides a clear insight into profitability. Poka also provides actionable insights for companies to stay compliant and provide safer working conditions as part of their ESG goals.

Over the past decades companies have invested trillions of dollars enabling back office workers to do their jobs. With the massive focus on efficiency, industry 4.0 and the merging of the physical and digital worlds to drive automation, companies are now looking to enable factory and field workers to work smarter, safer and more efficiently.

The acquisition puts IFS at the nexus of this trend as it now combines its ERP / FSM / EAM technology with Poka and extends its value all the way to the actual user empowering them at every step.

Founded in 2014 by Alexandre Leclerc and Antoine Bisson – the company has customers in 55 countries which include brands such as Nestlé, Tetra Pak, Mars, Bosch, RioTinto, Coty, Alcoa, Hitachi Energy, Mahle, and more. For companies such as these, recent global events have created a heightened degree of complexity, and uncertainty in labor availability as well as impacted supply chains and raw material sourcing. To address these business challenges, organizations are doubling down on their efforts to achieve faster digital transformation. At the heart of this renewed focus is the need to empower their own employees making the Connected Worker a key focus.

Connected Worker technologies go beyond delivering a software application to help workers do their jobs better. When frontline workers are digitally connected, companies are better able to gather and share critical operational data real-time, leading to optimized work systems where insights are contextualized and responsive.

IFS CEO, Darren Roos, commented "The concept of a connected worker is synonymous with the augmented worker because of the direct impact on improving productivity and operational efficiency. With a potential manufacturing skills gap in the U.S. alone which could result in 2.1 million unfilled jobs by 2030*, closing this gap, it is as much a technology need as it is a change management and worker empowerment need. Improving access to information and knowledge means workers can become part of an integrated continuous improvement cycle." ***Roos added:*** The concept of connecting every single worker was historically overlooked as part of digital transformation journeys yet, giving workers the ability to get information whenever and wherever they are in the factory not only improves their experience, it is fundamental to building manufacturing agility something we understand very well at IFS."

Alexandre Leclerc, CEO of Poka commented: "We are incredibly proud of the best-in-class platform we've built and our pioneering leadership in the Connected Worker space. Becoming part of IFS will enable us to further innovate and extend the value we create for manufacturers" He added: "As the global workforce crisis deepens, more companies are looking to scale their digital factory projects across the enterprise ***Leclerc concluded:*** "With the help of IFS's global presence and industry experience, Poka will be better equipped to deliver on its mission at scale."

Poka was the recipient of an Open Bosch Award in recognition of outstanding innovation and was distinguished as a top Connected Worker vendor in Gartner's Hype Cycle for Manufacturing Operations Strategy, four years in a row.

About IFS

IFS develops and delivers enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers – at the Moment of Service. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector.

BIRDROCK HOME SHORTENS ORDER PLANNING TIME BY 76% WITH PLEX DEMANDCASTER

BirdRock Home provides an extensive array of high-quality products for the home, garden, automobile, and garage both online and through brick-and-mortar retail partners. In the consumer packaged goods space, order planning and forecasting are critical to remain agile and react quickly to changes in consumer demand. However, BirdRock was still using antiquated methods with an expansive spreadsheet process created by a third party to manage ordering for their 700 active product SKUs. From start to finish, one round of planning took approximately one month to complete. "By the time I finished, I was already 30 days late, and the data was now inaccurate," commented Analucia Pandini, BirdRock Demand Planner Specialist. With the organization running on visibility to out-of-date information, there was a reduced ability to act in a timely manner. This in turn increased BirdRock's risk of over-forecasting and over-buying, leading to the costly proposition of holding more inventory than needed and impacting the bottom line.

At A Glance

- Order planning cycle shortened by 76%
- Improved inventory management and forecast accuracy
- Proactively identifying changing trends and situations

"It's so easy to identify the trends, ups and downs, potential issues, and to show other departments what's going on so we can do something now." ***Analucia Pandini, BirdRock Demand Planner Specialist***

Time to Modernize to Improve Agility

With a desire to increase process efficiency, visibility, data accuracy, and better respond to market demands, BirdRock made the decision to find a solution that would eliminate the need for their outdated means of planning and provide a real-time data view. Pandini's impressive resume in

implementing enterprise ERP and SCP systems gave her unique insights when selecting the solution best suited for BirdRock's needs. After exploring several options, she and other members of the BirdRock team chose cloud-based Plex DemandCaster Supply Chain Planning, with note to its userfriendly nature. DemandCaster met Pandini's high standard based on her 15 years of experience in supply chain planning, and she stated, "to me, it was a no-brainer. It had to be DemandCaster software."

Ushering in a New Era of Productivity

Based on her past implementation expertise, Pandini knew what to expect when it came to getting DemandCaster in place. Together with great support from Mark Chuberka, NetSuite Administrator, they executed an expedient go-live. Chuberka was hands-on and easily able to get the interface between DemandCaster and NetSuite up and running.

The expectations were high right off the bat, as it was critical that DemandCaster pick up all elements of the workflow to continue operating at 100%. Thanks to Plex DemandCaster's user-friendly interface and reporting functionality, the BirdRock team was very receptive to the change and adjusted to their new system seamlessly. They were able to start using the new solution almost immediately and with little impact on the day-to-day workflow.

Improved Proactive & Reactive Decision-Making

Since completing the implementation, BirdRock has seen major improvements. It's much easier to successfully communicate across their facilities thanks to Plex DemandCaster, which has improved inventory management and optimized the supply chain. The ability to identify the areas of business that need attention is increasing reliability and efficiency. Data trends and potential issues are caught with more frequency and employees make more informed decisions because they recognize changes in real time. Ultimately, they can create highly accurate plans, reduce costs, and produce better customer outcomes.

Before Plex DemandCaster, one planning cycle took approximately one month. Now, in terms of reviewing forecasts and landing requirements, this timeframe has been shortened to one week at most. With less time spent deep in planning and forecasting data, the BirdRock team can focus their time on analyzing the data in strategic processes like forecast performance reviews. Pandini described how these changes have also allowed her to spend valuable time with the product development, sales and marketing, and warehouse teams, preparing for what's next. "It's so easy to identify the trends, ups and downs, potential issues, and to show other departments what's going on so we can do something now," Pandini said.

As they look towards the future, the BirdRock team aims to continue being a reliable and efficient source of goods for their customers and adapt to demand fluctuations with confidence with the help of Plex DemandCaster. As an industry veteran, Pandini suggests that other manufacturers consider moving away from solutions such as spreadsheets for their supply chain planning needs. "Stay away from it," Pandini advised. "That's the stone ages of planning and forecasting." Instead, she councils that companies open themselves up to change. While she recognizes the reaction of resistance in process and system changes, she also knows that Plex DemandCaster can up-level an organization's strategic supply chain planning, a game changer in today's manufacturing reality.

About BirdRock

Based in Austin, Texas with fulfillment centers across the United States and development teams in 5 countries, BirdRock Home specializes in high-quality goods for the home, outdoors, office and more. Since 2008, BirdRock has been a reliable source of high-quality products and backs them up with friendly and helpful customer support.

About Plex

Plex, by Rockwell Automation, is a leader in cloud-delivered smart manufacturing solutions, empowering the world's manufacturers to make awesome products. Our platform gives manufacturers the ability to connect, automate, track, and analyze every aspect of their business to drive transformation. The Plex Smart Manufacturing Platform™ includes solutions for manufacturing execution (MES), ERP, quality, supply chain planning and management, asset performance management, production monitoring, process automation and analytics to connect people, systems, machines and supply chains, enabling them to lead with precision, efficiency and agility. To learn more, visit www.plex.com.

WORKDAY INTRODUCES THE NEXT-GENERATION ELASTIC HYPERCUBE TECHNOLOGY FOR WORKDAY ADAPTIVE PLANNING

Technical Innovation and Embedded Artificial Intelligence Enable Global Organizations Like Boeing and Mondelēz International to Meet the Growing Scale and Complexity of Large Enterprise Planning

Workday, Inc., a leader in enterprise cloud applications for finance and human resources, introduced the next generation of its patented Elastic Hypercube Technology (EHT), the intelligent modeling engine that powers Workday Adaptive Planning, to address the growing demands on organizations as they model more complex business scenarios, manage changing business needs, and expand planning to more users.

Today's economic uncertainty, market volatility, and heightened competitive landscape mean planning teams must analyze and report on massive datasets while accounting for a vast number of scenarios. More dimensionality, new types of data and data sources, the emergence of artificial intelligence (AI) and machine learning (ML), and a growing number of stakeholders add even more complexity to the planning process, making it increasingly important that planning tools deliver ease of use, speed, and scale.

The next generation EHT in Workday Adaptive Planning is enhanced with new embedded AI and performance improvements that efficiently calculate complex models by adding memory and compute power as needed, resulting in dynamic, automatic scaling. This new technology is designed to support even the most complex multi-dimensional planning requirements and a high level of concurrent users, without sacrificing speed or performance.

Power and Scale, Without Compromising Flexibility and Ease of Use

Boeing transformed its workforce planning from a siloed process to a flexible, consistent, and scalable solution with Workday Adaptive Planning. With all its workforce data in one system, Boeing was able to standardize processes and increase visibility into open job requisitions, driving cost savings and operational efficiency.

"We transitioned from hundreds of manual spreadsheets in favor of a more flexible configuration on Workday Adaptive Planning, effectively eliminating our reliance on datasets that were disconnected from each other, which came with extra costs to administrate," said Jeremy McCann, manager of enterprise workforce planning, Boeing. "With the latest EHT innovations, we now feel more confident that we have the processes and visibility required to build the right workforce to execute on our long-term business strategy."

With Workday Adaptive Planning, Mondelēz International has been able to work more effectively and make faster, more strategic decisions about the future of its non-production workforce.

"Planning is becoming more complex for large organizations, and with more than 90,000 employees across 82 countries, workforce planning at Mondelēz is no exception," said Marcel Sakr, functional lead, performance, rewards & workforce planning, Mondelēz International. "With Workday Adaptive Planning, we're able to analyze high volumes of data with multiple dimensions and pull detailed reports in seconds versus minutes. The next generation EHT has helped us gain employee-level visibility and simplify our monthly plan-to-actuals variance analysis, saving time and driving faster analysis decision-making."

Faster Answers to Complex Questions with Enhanced Performance, Speed, and Scale

With the next generation EHT, Workday Adaptive Planning customers will experience:

- ***Optimized speed and performance.*** Reports, dashboards, and sheets are designed to open quickly, without any performance degradation, including for very large, multi-dimensional views. Embedded AI in EHT will anticipate and compute calculations based on past behaviors and inspect the overall model to identify empty data cells where analysis is not required.
- ***Higher user concurrency support.*** With increased scalability, more users have access to the platform concurrently to accommodate the growing number of financial, human resources, and business users engaged with an organization's planning process.
- ***Accelerated data integration.*** Faster import and export of large amounts of financial and non-financial data will be delivered for complete and accurate models.

"For many organizations, the ability to quickly model and understand implications of business decisions and disruptions is more important than ever before," said Dennis Yen, general manager of Workday Adaptive Planning, Workday. "With our continued EHT innovations – including adding to the solution's existing AI and ML functionality – Workday Adaptive Planning is helping more than 6,000 companies take control and plan proactively for their futures by providing continuous planning, company-wide planning, deeper insights, and the ability to adapt and perform at scale."

About Workday

Workday is a leading provider of enterprise cloud applications for finance and human resources, helping customers adapt and thrive in a changing world. Workday applications for financial management, human resources, planning, spend management, and analytics are built with artificial intelligence and machine learning at the core to help organizations around the world embrace the future of work. Workday is used by more than 10,000 organizations around the world and across industries – from medium-sized businesses to more than 50% of the Fortune 500. For more information about Workday, visit workday.com.

AMAZON WEB SERVICES AND SAGE EXPAND PARTNERSHIP TO MODERNIZE FINANCE AND ACCOUNTING FUNCTIONALITY

- Announcement marks first-time availability of Sage Intacct on Amazon Web Services in the US
- Expanded relationship means Sage Intacct on Amazon Web Services is now available to customers in six countries across the globe

Sage, the leader in accounting, financial, HR and payroll technology for small and mid-sized businesses (SMBs) announced an expanded relationship with Amazon Web Services (AWS), focused on helping SMBs speed up their digital capabilities and benefit from the latest cloud accounting and management technology.

US Customers who are looking to implement Sage's award-winning software, Sage Intaact, will now have first-time access to the technology on AWS. Sage Intacct customers now have the expanded flexibility to scale at pace, knowing they're supported by the availability, reliability, and security delivered by AWS. In addition, AWS customers can now benefit from Sage Intacct on AWS to modernize their finance function, unlock efficiencies by automating finance processes, and save time by making decisions faster using real-time data and insights.

"Providing SMBs with the added flexibility of cloud access to Sage's flagship products on AWS is crucial in helping them digitally transform and future-proof their businesses," said Eduardo Rosini, the Executive Vice President of Partners & Alliances at Sage. "This relationship between Sage and AWS offers SMBs cutting-edge cloud innovation, real-time access to data analytics and insights, and a modern finance solution with secure and compliant data storage."

Sage Intacct has expanded regional availability on AWS to the US, after launching in the AWS US West (Oregon) Region. This move enhances existing AWS availability in the AWS Canada (Central) Region, AWS Australia (Sydney) Region, and AWS Europe (Ireland) Region, which also supports Sage Intacct in South Africa.

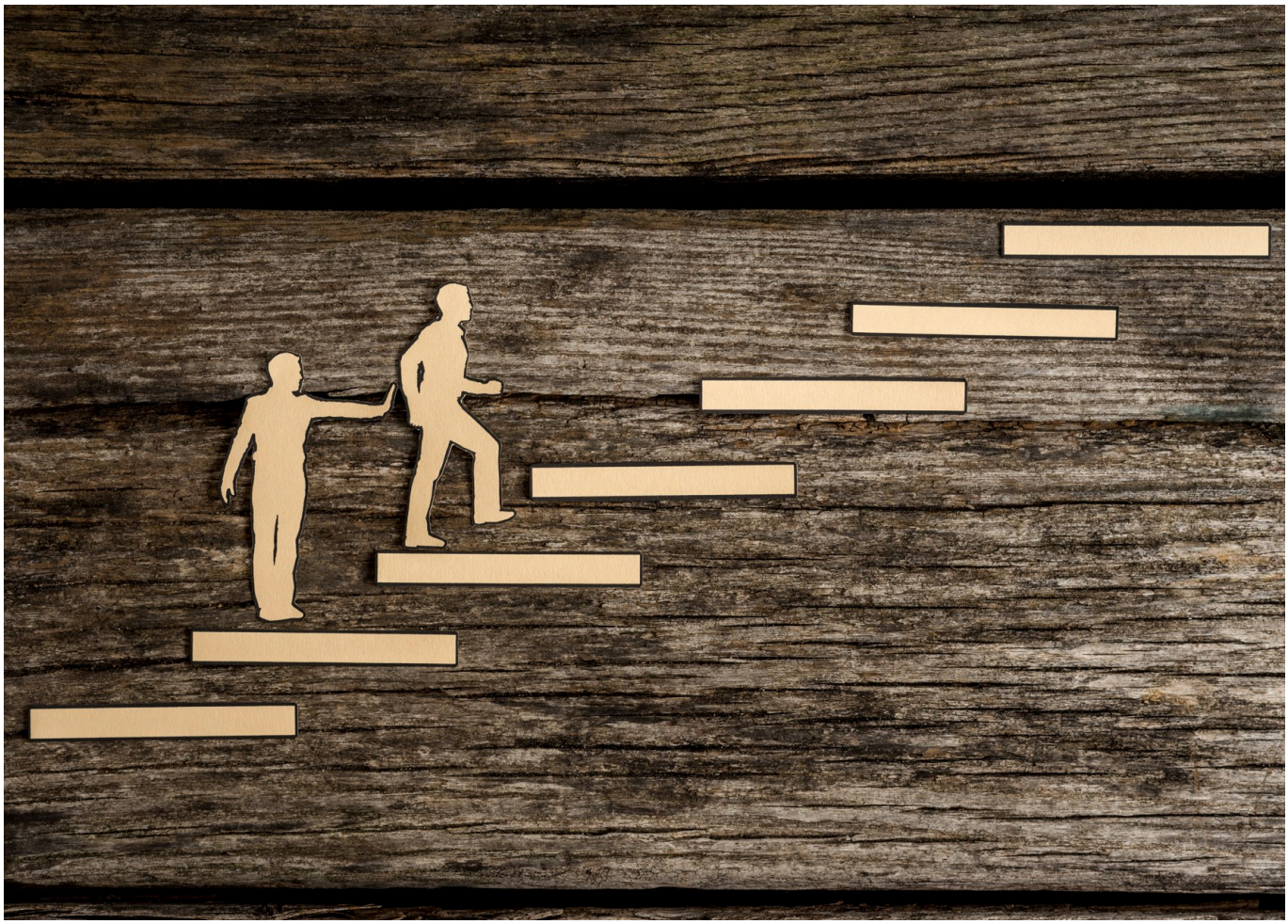
Rachel Skaff, Managing Director, Americas Channel and Partner Sales, AWS, adds: "We're thrilled to expand our relationship with Sage, helping small and mid-sized businesses accelerate their finance and digital transformation with access to Sage Intacct on AWS. Our secure, scalable, and reliable cloud infrastructure, combined with Sage's powerful accounting software, will directly help SMBs modernize, and gain access to the latest cloud technology."

Like customers who will benefit from the new platform in the US, Canadian not-for-profit, Hope's Home, has been able to take advantage of Sage Intacct powered by AWS. CFO Sudesh Galhenage explained: "It was essential for us have our organization's data held in a secure environment in Canada. When we learned Sage was working with AWS in Canada, we felt confident moving ahead with our digital transformation initiative."

With Sage Intacct powered by AWS, SMBs can:

- ***Accelerate growth:*** Anytime, anywhere access helps SMBs work smarter so they can get business done when and where it suits them. With Sage Intacct on AWS, SMBs can benefit from the flexibility, scalability, and innovation capabilities that AWS provides to grow their businesses.
- ***Unlock efficiency:*** With access to reports in seconds, SMBs can get all the insights and data needed to make smart decisions. This real-time visibility cuts down the need to check data accuracy, freeing up valuable time. SMBs can manage growing data volumes and different data types with ease, as core finance processes are automated.
- ***Simplify security:*** Sage's powerful accounting software can now leverage the security expertise of AWS. SMBs can keep data safe with rigorous security certifications and measures to prevent fraud.

AWS infrastructure supports Sage's cloud strategy which aims to give customers access to the cloud, making it simpler for them to do business. Sage is dedicated to helping customers understand the benefits of hosting products such as Sage Intacct within efficient cloud environments and working with AWS directly supports this initiative.



About Sage

Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to make work and money flow. By digitizing business processes and relationships with customers, suppliers, employees, banks, and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/ and www.sageintacct.com.

COGNIZANT AND SERVICENOW ANNOUNCE STRATEGIC PARTNERSHIP TO ACCELERATE ADOPTION OF AI-DRIVEN AUTOMATION

- Cognizant's industry expertise and solutions, including the AI-led Cognizant Neuro® suite of platforms, integrated with ServiceNow's intelligent platform for end-to-end digital transformation, are expected to accelerate the path toward building a combined $1 billion business
- Cognizant is ServiceNow's lead launch partner for end-to-end observability solutions for cloud applications across industries
- Cognizant's newly formed internal ServiceNow Business Group will bring to market AI-powered, integrated offerings designed to deliver next-generation, cost-optimized solutions for clients

Cognizant and ServiceNow announced a strategic partnership to advance adoption of AI-driven automation across industries. The expanded alliance is expected to accelerate the path toward building a $1 billion combined business for Cognizant and ServiceNow.

Cognizant's ServiceNow Business Group will help joint clients challenged by rising costs, growing tech debt, manual processes and sub-optimal customer experiences deploy AI to help drive improvements in three key areas:

- ***Enriched operational effectiveness*** – reimagined managed services to improve the effectiveness of IT and promote business stability.

- ***Enhanced experience*** – powered by the Cognizant Neuro® suite of AI-led platforms to transform siloed customer, employee and business experiences to a unified, total experience.

- ***Expedited innovation*** – leveraging the power of Cognizant domain IP and ServiceNow industry solutions to allow faster innovation and time to market.

"Across sectors, firms strive to improve their competitiveness, optimize operations, and deliver better overall experiences, but face challenges around platform silos and intensive, manual workflows," ***said Ravi Kumar S, Cognizant CEO.*** "Cognizant and ServiceNow are well-positioned to address these challenges through the combination of our deep industry expertise, enterprise AI solutions and ServiceNow's powerful platform, delivering innovative, cost-effective solutions that enhance the value of our clients' products and services to their end customers."

"Every CEO is in an innovation race right now. The winners will embrace AI-led transformation to reinvent how they do business," said ***ServiceNow Chairman and CEO Bill McDermott.*** "By combining the power of Cognizant's solutions and services with the intelligent platform for end-to-end digital transformation, we will accelerate automation to solve our customers' toughest challenges. This means organizations in every industry from healthcare and life sciences to financial services, can keep pace in this ever-changing environment."

The multi-disciplinary Cognizant ServiceNow Business Group significantly expands the decade-long relationship between the companies and will bring to market integrated offerings designed to solve complex problems, automate operations and enhance employee and end-customer experiences through the use of AI.

By integrating the power of the Now Platform® and ServiceNow's industry product solutions with Cognizant's domain expertise and IP, clients will be empowered to move beyond siloed decision-making and leverage data across the enterprise to drive enhanced business differentiation, including:

- Elevating customer and employee experiences across the enterprise through generative AI and hyperautomation of ERP systems.

- Delivering next-generation service operations through cloud observability, AIOps and strategic portfolio management.

- Optimizing workflows such as onboarding, credentialing, and contract and audit management, to streamline inter-enterprise processes and real-time data exchange.

- Simplifying contact center management to drive personalized engagement and improve retention.

- Improving asset management for proactive maintenance and procurement.

- Enabling effective pathways to net zero emissions through ServiceNow's ESG solution that helps companies activate ESG strategies programs and initiatives, and Cognizant's deep IoT expertise and knowledge of ESG processes.

To learn more about the Cognizant ServiceNow partnership, visit this page.

Use of Forward-Looking Statements

This press release contains "forward-looking statements" about the expectations, beliefs, plans, and intentions relating to the strategic partnership between Cognizant and ServiceNow to accelerate adoption of AI-driven automation across industries and expand market growth and/or opportunity. Such statements include statements regarding future product capabilities and offerings and expected benefits to the combined business. Forward-looking statements are subject to known and unknown risks and uncertainties and are based on potentially inaccurate assumptions that could cause actual results to differ materially from those expected or implied by the forward-looking statements. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, each of Cognizant's and ServiceNow's results could differ materially from the results expressed or implied by the forward-looking statements made. Neither Cognizant nor ServiceNow undertakes any obligation, and neither of them intends, to update the forward-looking statements. Factors that may cause actual results to differ materially from those in any forward-looking statements include: (i) delays and unexpected difficulties and expenses in executing the partnership, delivering the product capabilities and offerings, or in achieving market growth and/or opportunity (ii) changes in the regulatory landscape related to AI, and (iii) uncertainty as to whether sales will justify the investments in the product capabilities and offerings. Further information on factors that could affect Cognizant's and ServiceNow's financial and other results is included in the filings each of Cognizant and ServiceNow, respectively, makes with the Securities and Exchange Commission from time to time.

About Cognizant

Cognizant (Nasdaq: CTSH) engineers modern businesses. We help our clients modernize technology, reimagine processes and transform experiences so they can stay ahead in our fast-changing world. Together, we're improving everyday life.
See how at www.cognizant.com or @cognizant.

About ServiceNow

ServiceNow makes the world work better for everyone. Our cloud-based platform and solutions help digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow.
For more information, visit www.servicenow.com.

SALESFORCE'S NEW SALES GPT AND SERVICE GPT DRIVE PRODUCTIVITY AND PERSONALIZE CUSTOMER INTERACTIONS WITH GENERATIVE AI

Editor's Note: Service GPT, Sales GPT, and the Einstein GPT Trust Layer are now generally available. Go here to learn more.

- Sales GPT and Service GPT will bring the power of trusted, secure generative AI, and real-time data from Data Cloud, to empower teams to close deals faster, anticipate customer needs, and increase productivity
- Customers like SmileDirectClub and AAA — The Auto Club Group use Salesforce to deliver personal experiences at scale

Salesforce, the global leader in CRM, introduced generative AI capabilities for Sales Cloud and Service Cloud to transform how sellers and service teams work and interact with customers. Sales GPT will embed generative AI in the flow of work, auto-generating customer emails, call summaries, account research, and more. Service GPT will auto-generate service replies, automatically summarize customer interactions into easy-to-access knowledge articles for service teams, and better prepare field service agents before they arrive at service locations.

Significance: Generative AI has the potential to transform how sales and service professionals in every industry do their jobs. In new research, more than 60% of sales and service professionals believe generative AI will help them better serve customers. Yet, 63% of sales professionals and 59% of service professionals lack the skills to effectively and safely use generative AI.

Salesforce AI solution: Einstein GPT*, which powers Sales GPT and Service GPT, supercharges customer experiences and company productivity with a trusted, open ecosystem-based generative AI grounded in proprietary real-time data. The Einstein GPT Trust Layer helps customers meet their enterprise data security and compliance demands by preventing large-language models (LLMs) from retaining sensitive customer data to help maintain data governance controls.

What's new: Salesforce is bringing trusted generative AI across every application directly in the flow of work for Sales and Service, as well as Marketing, Commerce, Slack, Tableau, Flow, and Apex.

Sales GPT will deliver trusted generative AI, backed by real-time data, to help sellers transform how they work and sell faster, smarter, and more efficiently.

- Sales Emails will auto-generate personalized and data-informed emails for every customer interaction, streamlining sales prospecting and saving sales reps valuable time.
- Call Summaries will free sales reps from manual note-taking with automatically transcribed and summarized calls, and follow-up actions to help improve seller productivity.
- Sales Assistant will summarize every step of the sales cycle — from account research and meeting preparation to drafting contract clauses — while automatically keeping the CRM up-to-date.

Service GPT and Field Service GPT will empower organizations to use generative AI and real-time data to scale service experiences from the contact center to the field, while reducing costs.

- ***Service Replies*** will auto-generate personalized responses grounded in relevant, real-time data sources, enabling service agents to resolve customer issues faster.
- ***Work Summaries*** will create wrap-up summaries of service cases and customer engagements based on case data and customer history.
- ***Knowledge Articles*** will be auto-generated and updated based on the latest real-time data from support interactions, so a company's institutional knowledge is continuously updated.
- ***Mobile Work Briefings*** will prepare field service teams for appointments by summarizing critical information before they arrive, helping them work more efficiently.

Salesforce partners like Accenture, Cognizant, Deloitte Digital, and IBM are helping businesses unlock the power of Sales GPT and Service GPT with new accelerators, custom AI strategies, and use cases to help increase productivity and profit.

Soundbites:

- "When it comes to sales, AI is the new UI. The confluence of generative AI, data, and CRM will help every sales leader unleash growth and elevate sales productivity. These exciting new Sales Cloud capabilities are transforming how sales teams work so sellers can work more efficiently — all while driving increased revenue and growth." — Ketan Karkhanis, EVP & General Manager, Sales Cloud, Salesforce
- "AI, data, and CRM are transforming customer service experiences. With the new Service Cloud, not only can you solve issues faster and empower your teams like never before, you can also drive new levels of efficiency and cost savings while boosting customer satisfaction." — Bill Patterson, EVP & GM, C360 Applications, Salesforce
- "As an innovation-led company, our partnership with Salesforce and use of Einstein GPT has been integral in our ability to drive efficiencies across the entire customer lifecycle, from lead acquisition to customer care. Salesforce's generative AI capabilities have enabled us to provide more personalized customer interactions, streamline service workflows using AI-generated insights, and maintain a holistic, 360-degree view of every customer." — Nathan Dawson, Senior Director of Global Technology, SmileDirectClub
- "Our goal is to deliver more personalized member engagement, make our processes more efficient and cost-effective, and drive innovation across our team within a safe and trusted environment. We're accelerating our digital transformation with Salesforce and AI Cloud as one of the partners that will help us implement AI across our entire business, including DevOps, support, sales, and underwriting." – Shohreh Abedi, EVP, Chief Operations Technology Officer, and Member Experience, AAA – The Auto Club Group

Availability:

- Service GPT is expected to be generally available in 2023.
- Sales GPT is expected to be generally available in 2023.
- Sales Emails is expected to be generally available in 2023.
- Call Summaries is expected to be generally available in 2023.
- Sales Assistant is expected to be generally available in 2023.
- Service Replies is expected to be generally available in 2023.
- Work Summaries is expected to be generally available in 2023.
- Knowledge Articles is expected to be generally available in 2023.

Learn more:

- Learn more about Sales GPT's new AI capabilities
- Learn more about Service GPT's new data and AI capabilities
- Understand how generative AI is transforming sales and helping transform small businesses
- Find out how generative AI is reshaping service contact centers
- Learn how Salesforce's new Salesblazer community empowers sales professionals

*Einstein GPT is not yet generally available to customers and has not yet been assessed for compliance with relevant healthcare, financial, and/or similar laws and regulations. Customers should review their own use cases and compliance requirements before making any purchasing decisions relating thereto.

About Salesforce

Salesforce, the global CRM leader, empowers companies of every size and industry to digitally transform and create a 360° view of their customers. For more information about Salesforce (NYSE: CRM), visit: www.salesforce.com.

ODOO S.A. ANNOUNCES €150M INVESTMENT FROM GENERAL ATLANTIC TO SUPPORT CONTINUED GLOBAL GROWTH

We look forward to working together, as we embark on an exciting journey of expanding Odoo's presence worldwide!

Odoo S.A., a leading provider of open-source integrated business software applications for small and medium-sized enterprises (SMEs), announced it has received a strategic investment of approximately €150m from General Atlantic, a leading global growth equity firm. Odoo S.A. plans to partner with General Atlantic to support the business' continued global expansion.

Founded in 2002 by CEO Fabien Pinckaers, Odoo is a disruptor to the global SME productivity software market. Odoo's "open core" philosophy has enabled community developers to create nearly 40,000 software applications for business functions including Finance, Sales, HR and Marketing, making it one of the largest business application stores in the world. Odoo allows SMEs to consolidate their software vendors into one integrated suite at an affordable price point, instead of spending a premium on individual point offerings. The Company's single integrated codebase also allows for seamless data transfer and interoperability between apps, saving time and money and streamlining operations.

Odoo's all-in-one approach has resonated with SMEs worldwide, garnering consistently strong customer and partner feedback. With 16 global offices serving over 50,000 paying customers across more than 200 countries, Odoo is strategically positioned to take advantage of the growing ERP market opportunity, which is expected to reach over $90B by 2029.

"We are proud of what Odoo has accomplished. We already offer a full spectrum of software applications to meet the unique needs of small and mid-sized businesses, and are constantly innovating beyond this," said Fabien Pinckaers, Founder and CEO of Odoo. "General Atlantic's partnership, including the firm's global platform and software experience, will be impactful as we focus on sustained, strategic growth worldwide."

"We believe Odoo's differentiated value proposition for SMEs, together with its global partner network and commitment to product innovation, provides a clear path for continued growth," said Tom Hussey, Principal at General Atlantic. "Odoo delivers a powerful, integrated product suite for business owners at a fraction of the cost of point solutions. We look forward to supporting the Odoo team to capture their global market opportunity."

"Odoo is much more than an ERP and has the potential to become a global category leader. We are delighted to welcome General Atlantic as a partner for this next phase of growth. Wallonie Entreprendre, as large institutional investor since 2014, fully delivered its mission of enabling scale up growth and will continue to support Odoo as reference shareholder," said Damien Lourtie, CFO of Wallonie Entreprendre and member of the Odoo Board of Directors.

Morgan Stanley and BNP Paribas Fortis served as financial advisors to General Atlantic.

| About Odoo

Odoo is a leading provider of all-in-one, open source business software for small and medium sized businesses worldwide. Founded in 2005, Odoo thrives in a unique and fully open ecosystem combining the resources of its community and partners to deliver a full range of easy-to-use, integrated and scalable business applications. Odoo has offices in the U.S., Belgium, Luxembourg, India, Hong Kong and Dubai. For more information, please visit: www.odoo.com.

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