

Armanino Operates in an Alternative Practice Structure:

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LET'S
TALK
WORKDAY



Let's Talk
Automation

WELCOME

Today's Presenter



Eddie Zhao
Armanino

LET'S TALK WORKDAY

Today's Agenda

- Armanino Overview
- Automation 101
- AI – Fact or Myth?
- Q&A

ARMANINO

Firm Overview

Our Promise

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.

Snapshot

2700+ Employees

Team Members in **45 States**

18th Largest CPA & Consulting Firm

Locations

- CALIFORNIA**
San Ramon
San Jose
San Francisco
Los Angeles (2)
Irvine
El Segundo
Woodland Hills
San Luis Obispo
- COLORADO**
Denver
- CANADA**
Vancouver
- IDAHO**
Boise
- TENNESSEE**
Nashville
- INDIA**
Ahmedabad
- ILLINOIS**
Chicago
- TEXAS**
Austin
Dallas
- PENNSYLVANIA**
Philadelphia
Scranton
- NEW YORK**
New York City
Garden City
- MISSOURI**
St. Louis St.
Charles
- WASHINGTON**
Bellevue



Armanino's Workday Practice

Workday Services Partner



- ✓ Full Financials, HCM, & Adaptive Partner
- ✓ 140+ Workday Implementations
- ✓ Full-Platform Experience
- ✓ Managed Services & Post Go-Live Support

The Armanino Solution



- ✓ 6K+ Clients
- ✓ Technical, Functional, and Industry Expertise
- ✓ Deep Product Experience
- ✓ Industry Leading Methods & Tools

Nationally Recognized



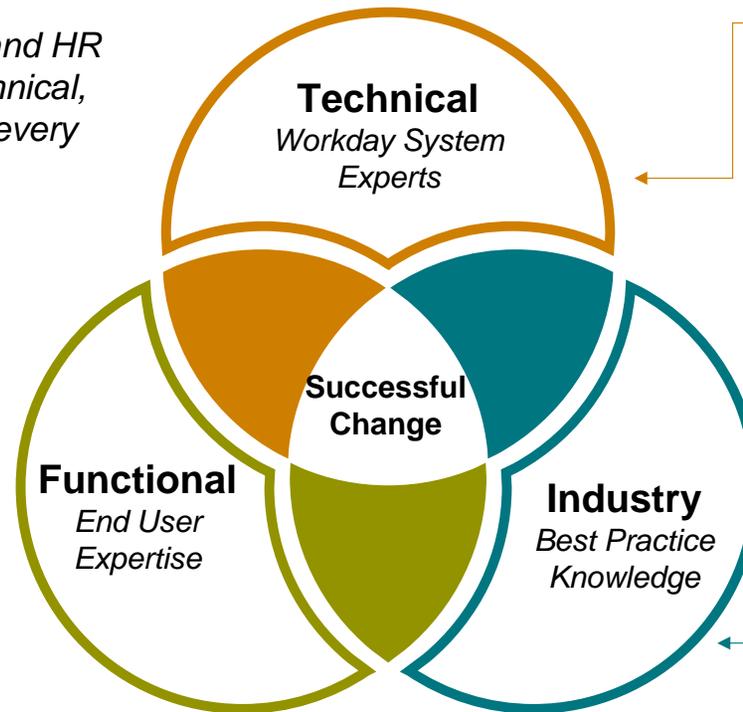
- ✓ Top 20 Consulting Firm
- ✓ 40+ Certified Consultants
- ✓ 100% Onshore
- ✓ Certified Workday Project Managers
- ✓ Certified Workday Integration Developers

The Armanino Solution

Armanino is a Finance, Accounting and HR consulting firm that incorporates technical, functional, and industry expertise in every project and implementation.

FUNCTIONAL

Our business leaders support in providing **strategic direction**, enabling **problem-solving**, and ensuring alignment with organizational goals and best practices. Our leaders have **10+ years' experience** serving as CFOs, HR VPs/Managers, Tax Managers, Controllers, Payroll Managers, etc.



TECHNICAL

Collectively our team has performed **hundreds** of implementations with an average of **8+ years** in the Workday ecosystem.

INDUSTRY

We drive successful Workday projects by incorporating **industry best practices** into every stage of implementation, ensuring our clients benefit from **optimized workflows**, **heightened efficiency**, and **enhanced outcomes** tailored to their specific sector.

What is Automation in Workday?



Process Automation



Data Quality



Security



Integration



You're
(probably)
thinking about
AI wrong



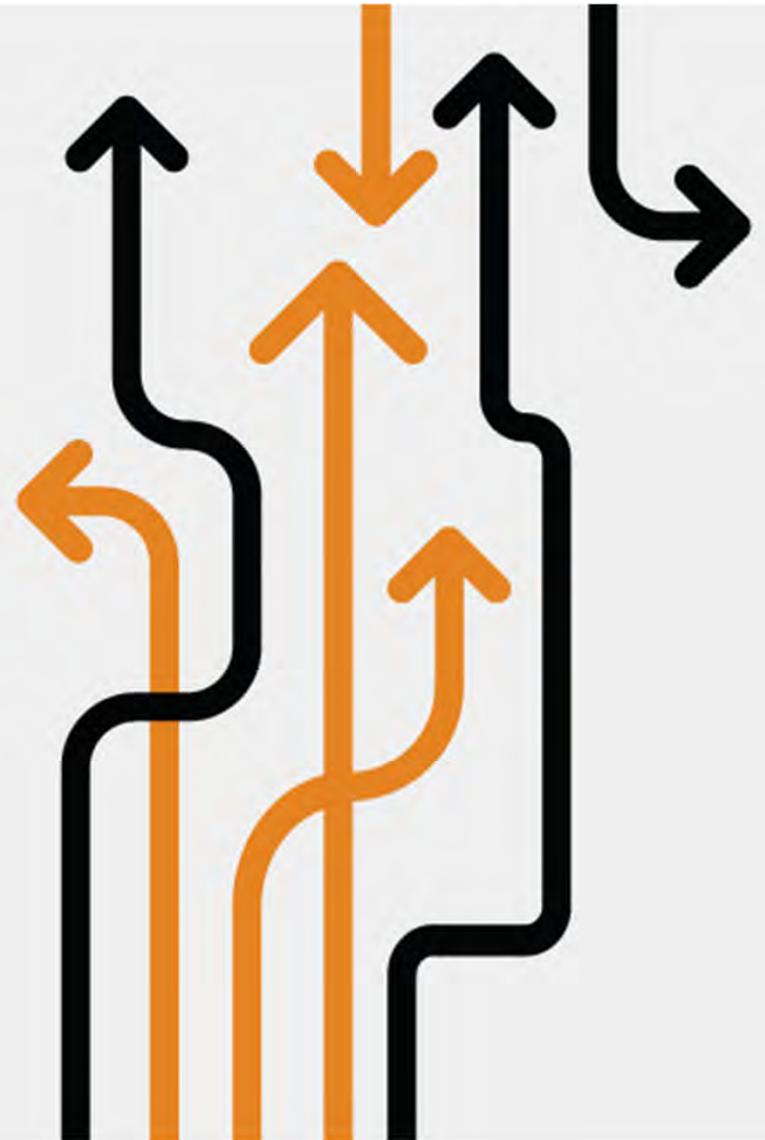
You're not alone

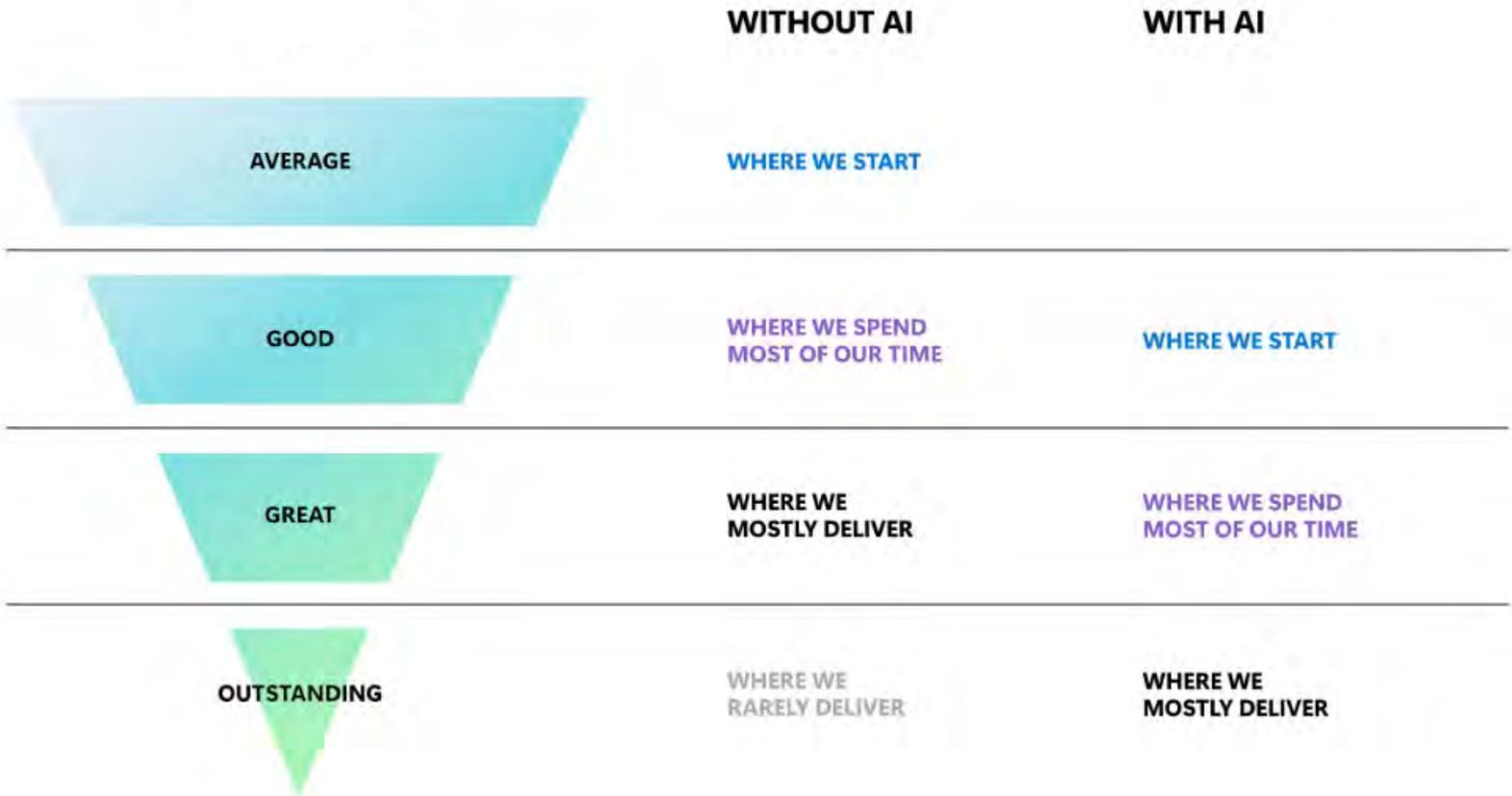
90% of professionals are excited to embrace AI

49% of professionals globally are worried they should know more about AI than they do

39% of global professionals have admitted to pretending they know more about AI to seem 'in the know' in front of teammates

Per 9/14/23 LinkedIn study





Delivered AI Features by SKU

oCHRO	Cross	oCFO		
<p>Core HCM</p> <ul style="list-style-type: none"> ✓ Skills Cloud ✓ Form Completion Assistant ✓ Suggested Skills for Workers ✓ Task Recommendations ✓ Workday Assistant* ✓ Compensation Survey Management ✓ Change Job Recommendations ✓ Search Insights ✓ Generate Ad Hoc Worker Communication* ✨ ✓ Enhanced Job Profile Business Process ✓ Manager Insights Hub* ✓ Compensation Plan Recommendation ✓ Compensation: Data Entry Check <p>Time Tracking</p> <ul style="list-style-type: none"> ✓ Time Anomalies for Managers ✓ Intelligent Prompt Recommendations for Time Entry <p>Talent Acquisition</p> <ul style="list-style-type: none"> ✓ Suggested Jobs for External Candidates ✓ Suggested Skills for External Candidates ✓ Suggested Skills for Job Profiles ✓ Suggested Skills for Job Requisition ✓ Semantic Search for External Career Sites ✓ Generate Job Description for Job Requisition* ✨ ✓ Job Description Generation on Job Profile ✨ <p>Workday Help</p> <ul style="list-style-type: none"> ✓ Intelligent Answers ✓ Draft Policy Articles ✨ ✓ Translate Articles ✨ <p>HiredScore</p> <ul style="list-style-type: none"> ✓ Embedded Talent Rediscovery* ✓ Spotlight ✓ Suggested Jobs in Career Hub <p>Learning</p> <ul style="list-style-type: none"> ✓ Learning Recommendations* ✓ Summarize Content Feedback ✨ ✓ Learning Captions and Transcriptions ✓ Learning Skills Tagging 	<p>Talent Management</p> <ul style="list-style-type: none"> ✓ Career Hub* ✓ Talent Marketplace* (Opportunity Marketplace and Flex Teams) ✓ Flex Team Suggestions ✓ Suggested Projects ✓ Development Items ✨ ✓ Career Pathing ✓ Guided Experience for Reviews ✓ Talent Highlights ✨ ✓ Skills Data Foundation <p>Scheduling</p> <ul style="list-style-type: none"> ✓ Recommend Replacement Workers ✓ Match Workers based on business parameters and worker preference <p>Labor Optimization</p> <ul style="list-style-type: none"> ✓ Labor Demand Management ✓ AI-based Shift Generation ✓ Demand Forecasting <p>Payroll</p> <ul style="list-style-type: none"> ✓ Pay Anomalies ✓ Prompt Recommendations ✓ P45 OCR ✓ Assistant on Payslip ✓ Payroll Data Input <p>Workday Peakon Employee Voice</p> <ul style="list-style-type: none"> ✓ Comment summarization ✨ ✓ AI Translations ✨ ✓ Semantic search ✓ Topics ✓ Priorities and Strengths ✓ True Benchmark ✓ Attrition prediction ✓ Multilingual Language Support <p>People Analytics</p> <ul style="list-style-type: none"> ✓ Skills ✓ Trend and Gap Insights ✓ Top Drivers <p>VINDLY</p> <ul style="list-style-type: none"> ✓ Candidate Best Match Index 	<p>Extend Professional</p> <ul style="list-style-type: none"> ✓ Workday Extend Developer Copilot ✨ ✓ Workday AI Gateway <p>CLM (Evisort)</p> <ul style="list-style-type: none"> ✓ Contract Intelligence (product) ✨ ✓ Contract Lifecycle Management (product) ✨ ✓ Contracts Intelligence Agent <ul style="list-style-type: none"> ✓ Ask AI ✓ Custom AI Models ✓ Contracts Negotiation Agent <ul style="list-style-type: none"> ✓ Ask AI ✓ Custom AI Models ✓ AI Drafting Tools <p>Prism Analytics</p> <ul style="list-style-type: none"> ✓ Prism Intelligent Pipelines 	<p>Core Financials</p> <ul style="list-style-type: none"> ✓ Journal Insights ✓ Customer Payment Matching ✓ Worktag Recommendations ✓ Accounts Receivable & Customer Overpayment ✓ Customer Invoice Sales Item and Revenue Category Recommendations ✓ Intelligent Prompt Recommendations for: <ul style="list-style-type: none"> ✓ Customer Overpayment ✓ Customer Invoices ✓ Ad-Hoc Bank Transactions ✓ Cash Management ✓ AI Matching for Bank Reconciliation Exceptions ✓ Collection Letters ✨ ✓ Supplier Invoice Automation: <ul style="list-style-type: none"> ✓ Worktag Recommendations ✓ Spend Category Recommendations on Supplier Invoice Lines ✓ Email Ingestion ✓ Invoice Scanning with OCR ✓ PO Line level Linking ✓ Touchless PO Invoices ✓ Intelligent Prompt Recommendations for Tax Attributes on Supplier Invoice Lines ✓ Auditoria AI Smartbots for Workday 	<p>Expenses</p> <ul style="list-style-type: none"> ✓ Expense Receipt Scanning ✓ Expense Protect <ul style="list-style-type: none"> ✓ Risk Scores ✓ Duplicate Expense Detection ✓ Amount Anomaly Detection ✓ Incorrect Expense Item ✓ Intelligent Prompt Recommendations and Defaulting for Expense Items <p>Procurement</p> <ul style="list-style-type: none"> ✓ Spend Category Recommendations for: <ul style="list-style-type: none"> ✓ Purchase Requisitions ✓ Purchase Orders and Non-catalog Requisitions ✓ Personalized Search Results <p>Adaptive Planning</p> <ul style="list-style-type: none"> ✓ Plan Anomaly Detection ✓ Outlier Reporting ✓ Predictive Forecaster

* Multiple use cases included
 ^ In worker profile and Career Hub
 ✨ Generative AI

POSSIBLE (RE)DEFINED
Questions?

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