

# Maximizing Organizational Effectiveness Through Technology

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EMPOWER YOUR PURPOSE®



# Meet the Presenters

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# Today's Agenda

- Leveraging Existing Technology Resources
- Enhancing Productivity and Efficiency
- Cybersecurity
- Reviewing Your Tech Stack
- Looking Forward
- Conclusion

# Importance of Technology

- Current and Future Staffing Shortages
  - There are 340,000 fewer accountants today compared to five years ago.
  - The AICPA has stated that roughly 75% of its members are at retirement age.
- Capacity and effectiveness of current workforce
  - A study from Stanford University found that productivity per hour decline sharply when a person works more than 50 hours per week.
- Budgetary Constraints

Resources:  
<https://www.forbes.com/sites/kateduchene/2024/08/02/the-cpa-shortage-isnt-going-away-but-ai-and-automation-can-help/>  
<https://www.cpajournal.com/2023/12/01/the-accounting-profession-is-in-crisis/>  
<https://www.cnbc.com/2019/03/20/stanford-study-longer-hours-doesnt-make-you-more-productive-heres-how-to-get-more-done-by-doing-less.html>



# Importance of Technology

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- Post-COVID revolution in how we work
- Tech was implemented quickly in 2020
- Do you know what you have?
- Are you utilizing what you pay for?
- Remote/Hybrid work is here to stay



The background of the slide features a grayscale image of several large, interlocking gears. Two hands are visible, one on the left and one on the right, appearing to touch or adjust the gears. The sky in the background is filled with soft, white clouds. A solid blue rectangular box is centered horizontally across the middle of the image, containing the main text.

**Leverage Existing Technology Resources**

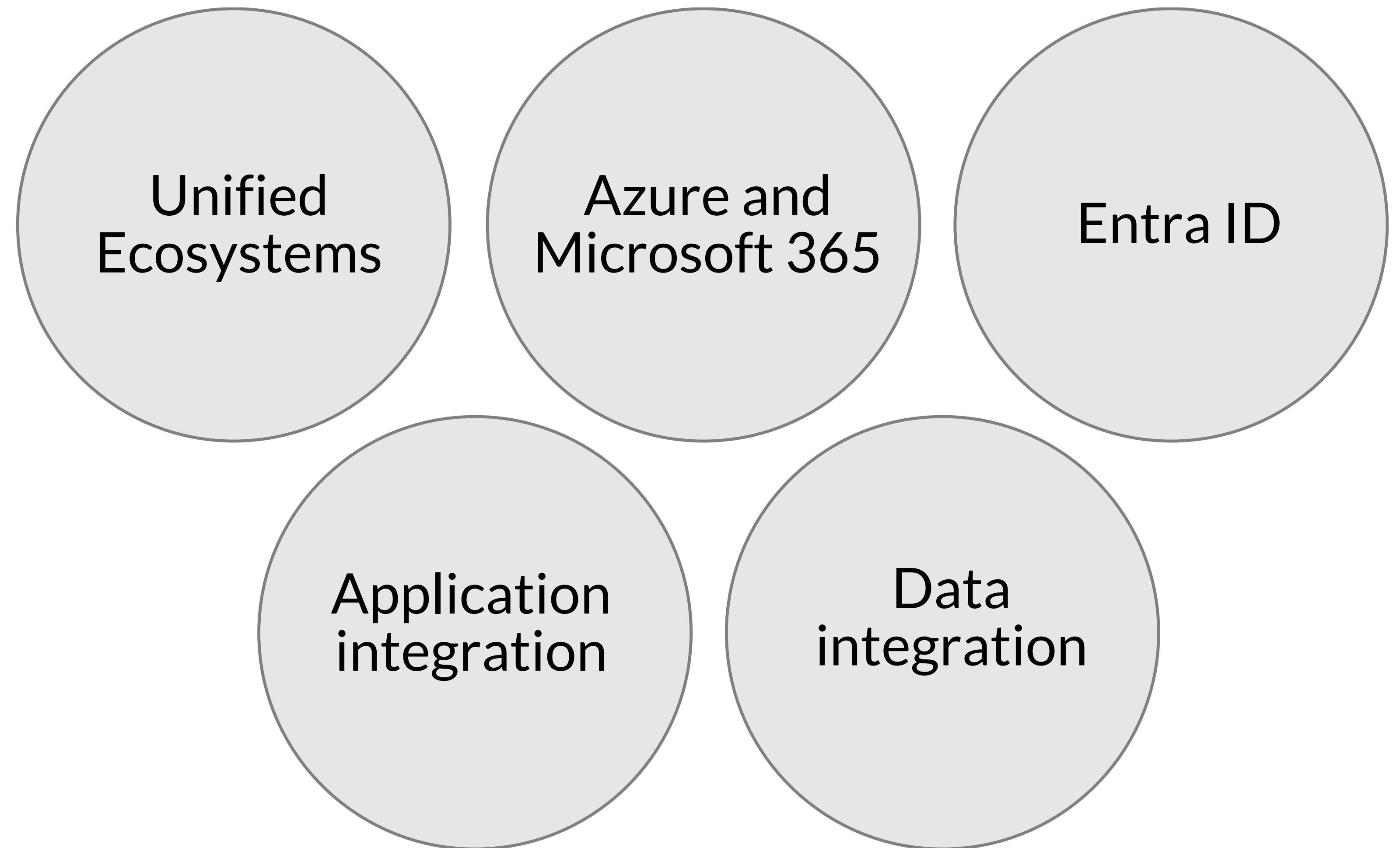
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**Maximizing Microsoft 365**







# Example: Scheduling Poll/Teams Meetings

FileMessageInsertOptionsFormat TextReviewHelpAcrobatTell me what you want to do

PasteBasic TextNamesIncludeTagsDictateAll AppsSensitivityEditorImmersive ReaderNew Scheduling PollShareFileShareFileViewViva Insights

ClipboardVoiceAppsSensitivityEditorImmersiveFind TimeSalesforceAdd-in

Send

FromErinn.Trask@rehmann.com

ToBen Eavey

Cc

Subject

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Click here to send me files directly

Scheduling Poll

View all your polls

Time zone  
(UTC-05:00) Eastern Time (US & Cana...  
Duration  
01:00Meeting hours  
Date  
10/16/2024  
Sort by  
Time  
08:00 AM  
08:30 AM

Scheduling Poll

Wednesday, October 16

8:00 AM

9:00 AM

12:00 PM

Location

Please enter a location.

Online meeting

Manage poll settings

Schedule when attendees reach consensus

Hold selected times on my calendar

Notify me about poll updates

Require attendees to verify their identity

Lock poll for attendees

Back

Create poll

## Discussion Poll

- 1 hour duration
- No location provided
- 3 options provided
- (UTC-05:00) Eastern Time (US & Canada)

Send reminderCancel poll

Scheduling poll

Choose times you prefer or are available

Wednesday, October 16, 2024

8:00 AM  
Busy

9:00 AM  
Busy

12:00 PM  
Busy

How others voted

Ben Eavey

8:00 AM  
No votes

9:00 AM  
No votes

12:00 PM  
No votes

1 vote

1 vote

1 vote

No votes

No votes

No votes

?

?

?

Schedule meeting

Schedule meeting

Schedule meeting

Propose another time

Vote

Organizer  
You (Erinn Trask)

Required Attendees  
Ben Eavey  
Add required attendee

Optional Attendees  
Add optional attendee

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# Polling Question #1





# Collaboration in SharePoint, Teams, OneDrive



# Live Document Collaboration



Why do we still email files back and forth for editing?



Integrated communication in Microsoft 365



Real-time authoring, together



Edit from any device



Version history



# Additional SharePoint Functionality



## Document Sign-off

- Basic Approval using rules
- Setup Power Automate to track approver name and date

## Review Notes

- Use Comment functionality within file
- Add Notes field in browser view
- Can setup notifications when files are changed.

## Restricting Access

- File and/or folder access setup options
- Check out files
- File/folder owners can set access to be view only for others



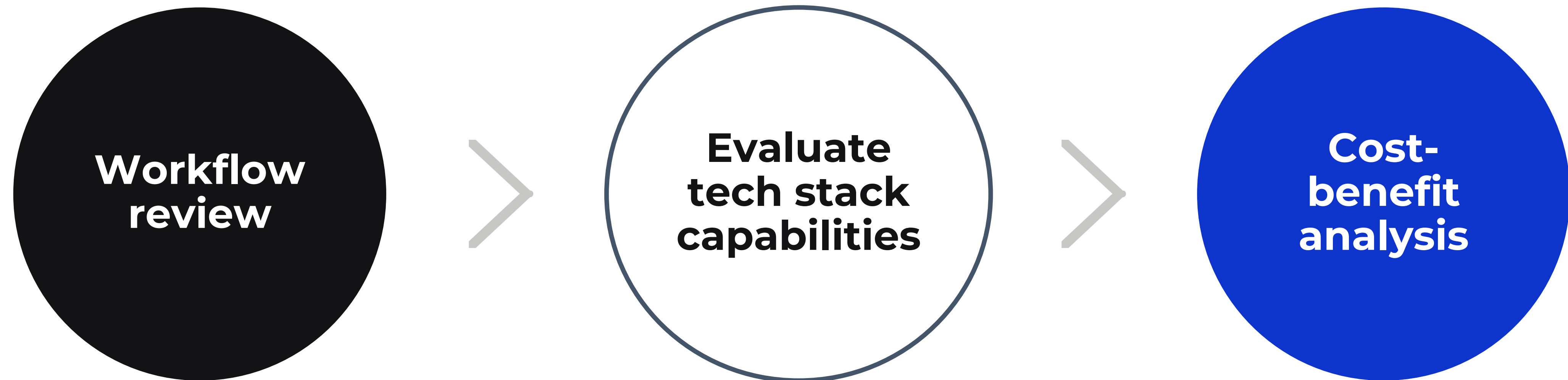
The background features a series of concentric, slightly blurred circles in shades of black and grey, creating a tunnel-like effect. A bright blue triangle is positioned in the lower right corner, partially overlapping the circular pattern. Two thin white diagonal lines cross the image, one from the top left to the bottom right, and another from the top right to the bottom left.

# Optimizing Workflows



# Identify and Automate Manual Processes

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# Example: Excel Macros for Credit Card Activity

- Problem identification
- Existing tech stack limitations
- Budgetary constraints and staff impact
- Solution:
  - Macro-enabled Excel spreadsheet
  - Paste the credit card activity export
  - Transaction reports are built and emailed to card holders
  - Power Automate accumulates returned emails
  - Excel template creates journal entry imports for GL system



# Example: Excel Macros for Credit Card Activity

	A	B	C	D	E	F	G	H	I	J
1	Last 4 of card number				Local File Path:					
2	1234	CEO	Chief Executive Officer	CEO@ABCGovernment.org	C:\Finance\Credit Card Reports\					
3	5678	CFO	Chief Financial Officer	CFO@ABCGovernment.org						
4	9876	CHRO	Chief Human Resources Officer	CHRO@ABCGovernment.org						
5	5432	CIO	Chief Information Officer	CIO@ABCGovernment.org						
6					Create Expense Reports					
7										
8					Prepare Emails					
9										
10										
11					Reset Workbook					
12										
13										
14										
15										
16										
17										

	A	B	C	D	E	F	G	H	I
1	Card	Transaction Date	Post Date	Description	Category	Type	Amount	Memo	Cardholder
2	1234	10/10/2024	10/11/2024	STAMPS.COM	Office & Shipping	Sale	-192.5		CEO
3	1234	10/9/2024	10/10/2024	STAMPS.COM	Office & Shipping	Sale	-27.489		CEO
4	5678	10/8/2024	10/9/2024	APPLEBEES	Food & Drink	Sale	-17.622		CFO
5	5678	10/7/2024	10/8/2024	DTE	Bills & Utilities	Sale	-29.7		CFO
6	5678	10/6/2024	10/7/2024	CONSUMERS ENERGY	Bills & Utilities	Sale	-127.6		CFO
7	9876	10/5/2024	10/6/2024	STAMPS.COM	Office & Shipping	Sale	-165		CHRO
8	9876	10/4/2024	10/5/2024	DOLLAR GENERAL	Merchandise & Inventory	Sale	-5.83		CHRO
9	9876	10/3/2024	10/4/2024	SHELL	Gas	Sale	-55		CHRO
10	5432	10/2/2024	10/3/2024	ACE HARDWARE	Repair & Maintenance	Sale	-74.767		CIO
11	5432	10/1/2024	10/2/2024	CONSUMERS ENERGY	Bills & Utilities	Sale	-158.4		CIO
12	5432	9/30/2024	10/1/2024	ACE HARDWARE	Repair & Maintenance	Sale	-6.237		CIO

	A	B	C	D	E	F	G	H	I	J	K	L
1	ABC Government											
2	Employee Credit Card Expense Report											
3	Employee: Chief Financial Officer											
4	Expense report for period ending 10/11/2024											
5												
6	Card	Transaction Date	Post Date	Description	Category	Type	Amount	Memo	Cardholder	Business Purpose	Account	Department
7	5678	10/8/2024	10/9/2024	APPLEBEES	Food & Drink	Sale	(17.62)		CFO			<div>▼</div>
8	5678	10/7/2024	10/8/2024	DTE	Bills & Utilities	Sale	(29.70)		CFO			
9	5678	10/6/2024	10/7/2024	CONSUMERS ENERGY	Bills & Utilities	Sale	(127.60)		CFO			
10												
11												
12												
13												
14												
15												
16												



# Example: Excel Macros for Credit Card Activity

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>ABC Government Employee Expense Report Journal Entry Preparation Template</b>												
2													
3	<b>Instructions:</b>												
4	Make sure that all of the expense reports are located in the folder designated below. The macros copies and pastes data starting in cell A7 through row 26, so it is important that the formatting of the expense reports was not changed.												
5													
6	<b>Compile expense reports</b> adds data from the individual expense report workbooks to the ReturnedReports tab. It also adds the formula for the accounts and validates the account numbers assigned. A prompt will appear once the macro finishes indicating whether there are errors with the account validation.												
7													
8	<b>Populate journal entry (on ForUpload tab)</b> transfers the data from the ReturnedReports worksheet to the ForUpload worksheet. Cell B22 on this tab must be updated with the date for that field of the journal entry to populate.												
9													
10													
11													
12	<div>Compile Expense ReportsPopulate Journal Entry</div>												
13													
14													
15	Update fields in blue below:												
16													
17	Batch ID: <div></div>												
18													
19	Location of Expense Reports: <div>C:\Finance\Credit Card JEs</div>												
20													



# Polling Question #2





**Enhancing Productivity and Efficiency**

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**Become More Efficient in Outlook**



# Manage Your Inbox with Rules, Categories, Quick Steps

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**Rules**



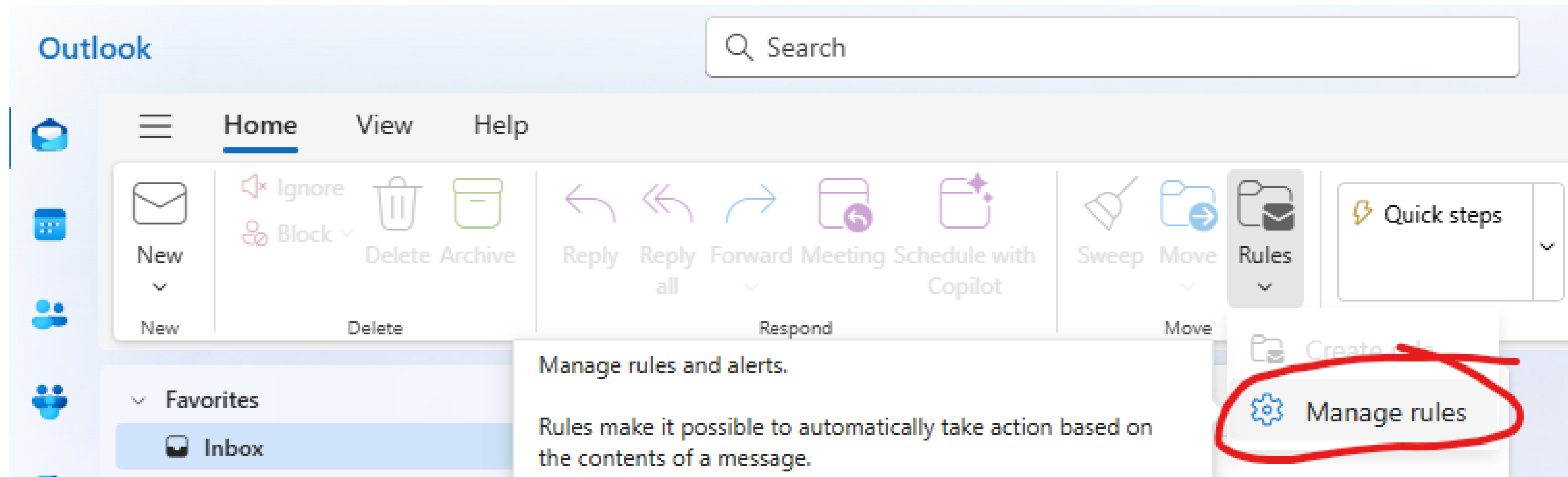
**Categories**



**Quick Steps**

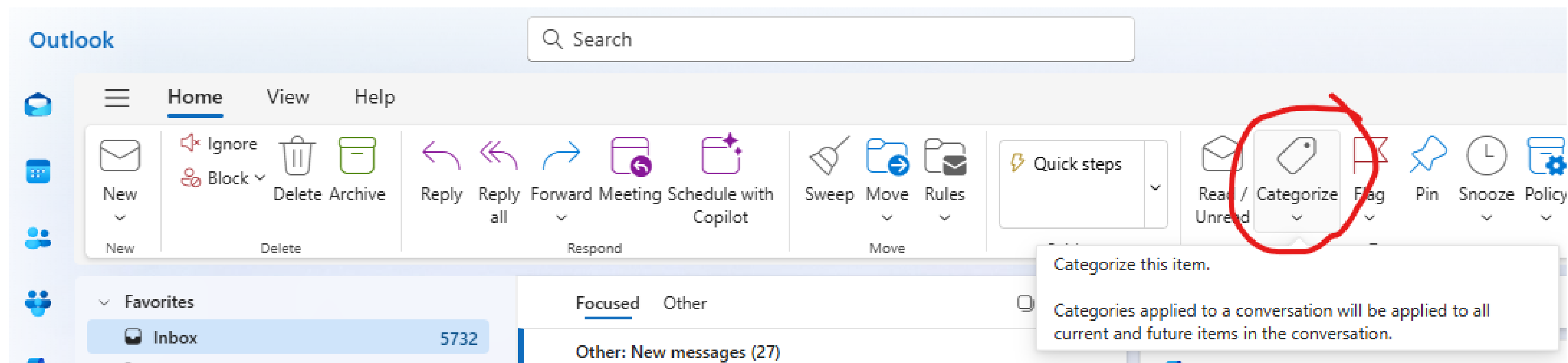


# Outlook Rules



- Automatically move emails into folders
- Flag or mark emails from important senders
- Automatic replies
- Inbox clean-up

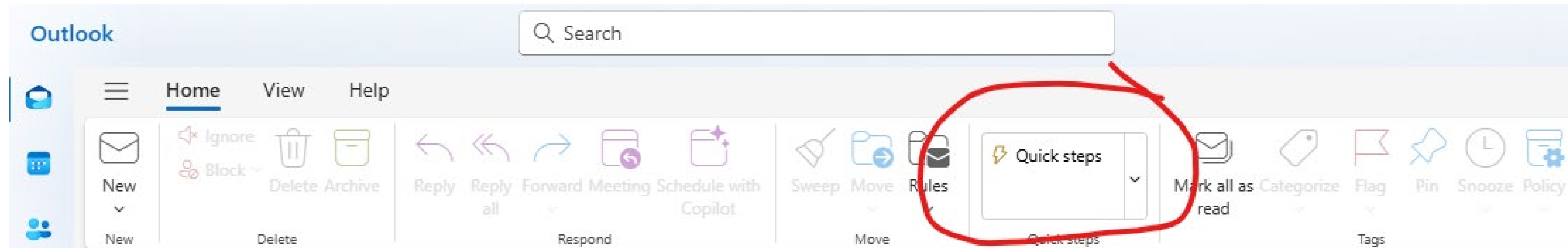
# Outlook Categories



- Can apply to emails, contacts, and calendar items
- Categorize by topic
- Categorize by priority
- Categorize by relationship type
- Color-code meetings and appointments
- Use rules to automatically apply categories



# Outlook Quick Steps



- Multiple steps with one click
- Example: send a reply, apply a category, move to a folder, and schedule a meeting

## Use Tasks and Microsoft To Do

- Is your Inbox your to-do list?
- Take the next step: Microsoft To Do
  - Task management and subtasks
  - Create recurring tasks
  - Custom lists/projects
  - Collaboration – share lists and tasks with others
- Integrations
  - Microsoft Outlook
  - Microsoft Planner
  - Power Automate



## Tips for Additional Productivity



Prioritize email appropriately among tasks



Set Outlook to open to your Calendar by default



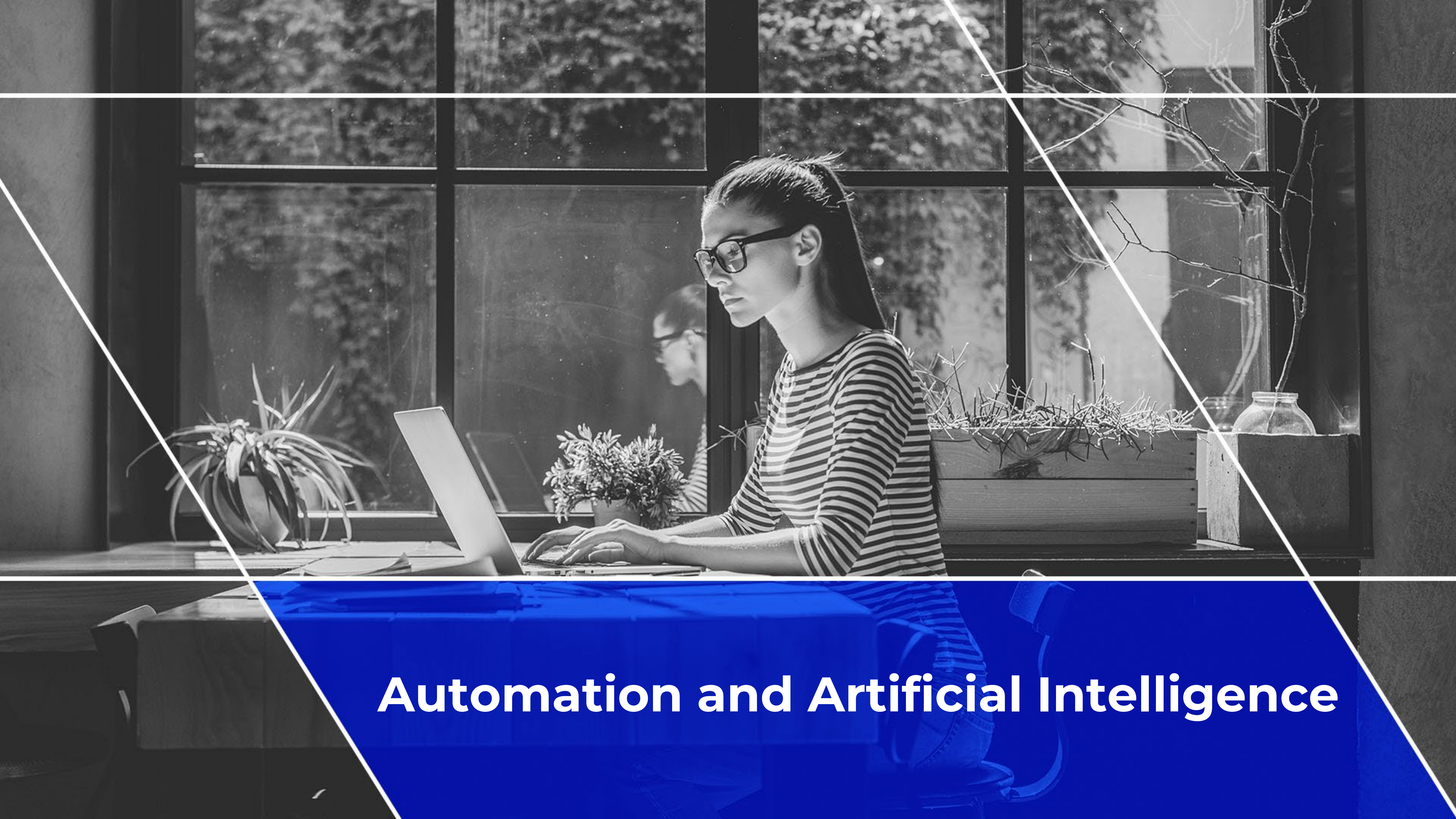
Turn off email notifications



Schedule focus time and email time on your calendar

Resource: <https://hbr.org/2022/08/how-much-time-and-energy-do-we-waste-toggling-between-applications>





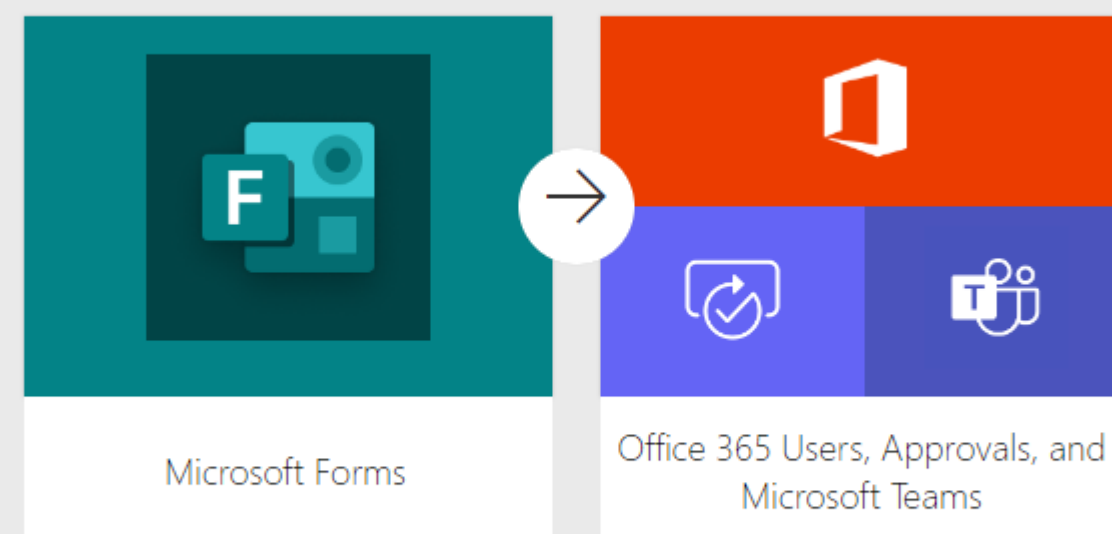
# Automation and Artificial Intelligence



# Microsoft Power Automate

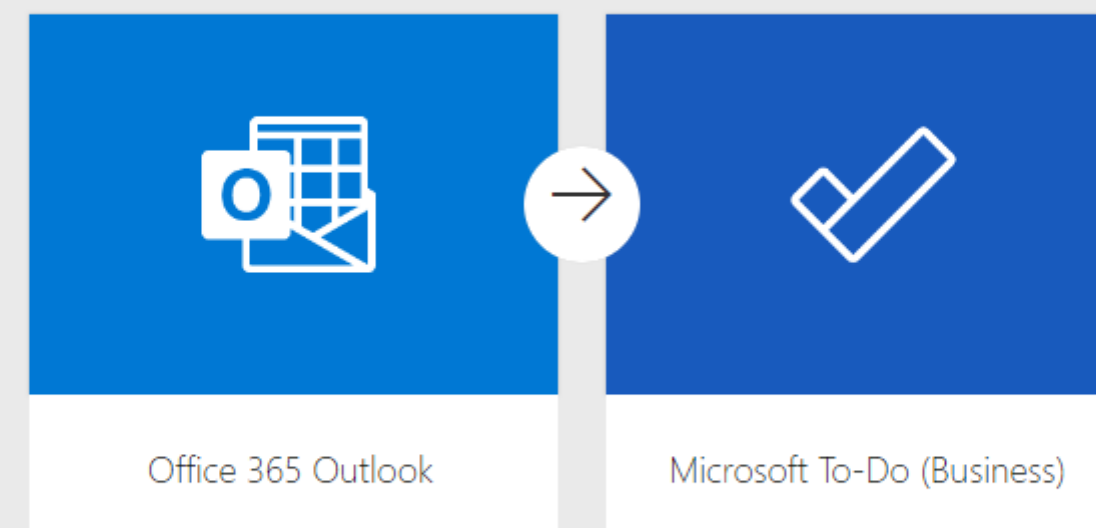
- Automate routine tasks in Microsoft 365 products
- Create your own or chose from the many templates available
- Leverage CoPilot to help you create workflows

Start an approval when a response is submitted in Forms



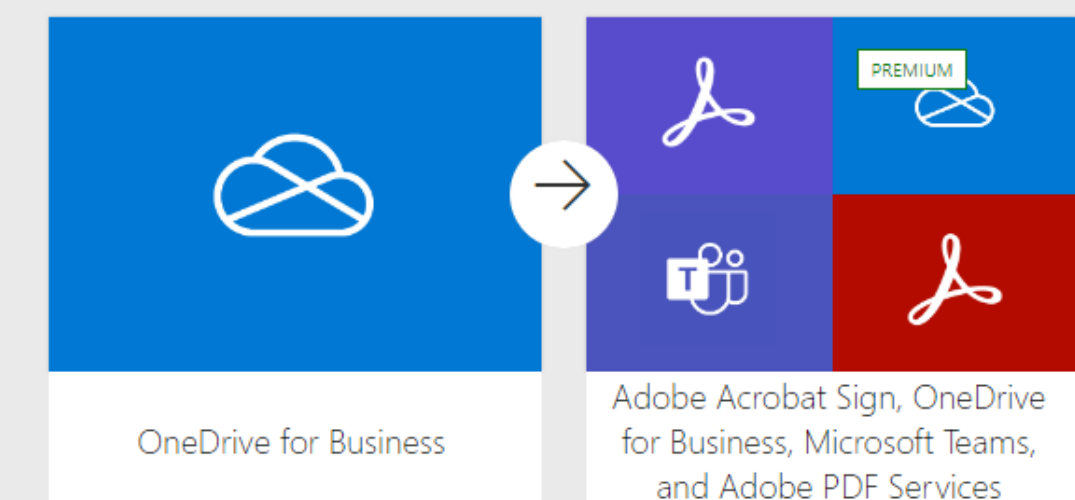
Send an approval when a response is submitted to a specific form. Notify the requestor of approval or rejection.

Create a To-Do task when you are mentioned in an Office 365 Outlook email



A Microsoft To-Do (Business) task will be automatically created when you are mentioned in an email. The To-Do task will consist of all relevant information such as the person who sent the email and the email content.

Generate agreement from Word template in OneDrive, and get signature



Generate custom document by selecting Word template in OneDrive and inputting custom data in a form, then send for signature with Adobe Sign and notify in Teams. Find sample templates for Document Generation at [https://www.adobe.com/go/pdfservices\\_templates](https://www.adobe.com/go/pdfservices_templates)

# Artificial Intelligence: The Basics

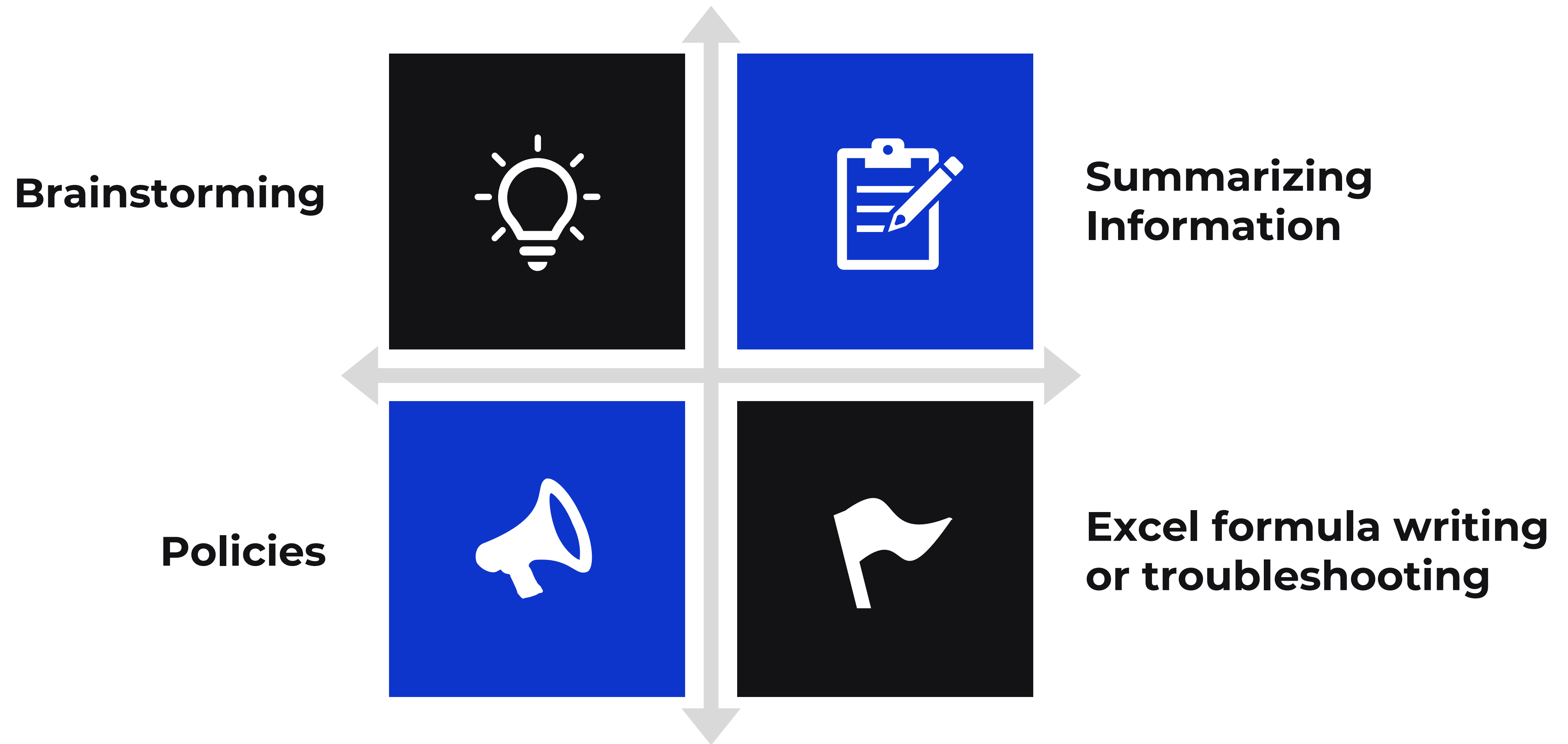
30

- ChatGPT and Microsoft Copilot
- Enterprise Data Protection in Copilot
- Importance of an AI Acceptable Use Policy
- Rehmann AI Webinar Series
  - <https://www.rehmann.com/resource/thriving-with-ai/>



# AI Use Cases

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# AI Use Cases

**Writing (or rewording)**



**Taking meeting notes  
& identifying action items**



**Additional  
functionality in Copilot  
for Microsoft 365**



**Presentations**



*Example: Interviewing job candidates*



# Polling Question #3



The background features a series of concentric, slightly blurred circles in shades of black and grey, creating a tunnel-like effect. A bright blue gradient area is positioned in the lower right, separated from the black area by a diagonal white line. Another diagonal white line runs from the top left towards the center. The text "Technology Stack" is centered in the blue area.

# Technology Stack





# Identify Technology Inefficiencies

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- Hardware
  - Servers, Storage
  - Endpoints
- Software
  - Windows
  - Business line apps
- Cloud
  - Business line apps
  - Virtual machines vs. PaaS

# Cloud Migration – From Capital to Operational Expense

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## Full serverless migration

- Entra ID instead of Active Directory
- Intune policies instead of Group Policy
- SharePoint instead of file servers

## Partial (hybrid) migration

- Some servers and applications aren't ready for cloud
- You don't need to move everything – be strategic

Success Story: Vredevoogd's Migration to the Cloud ([Click to read](#))





# Security Ramifications

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# Cybersecurity Essentials



# Cybersecurity Basics

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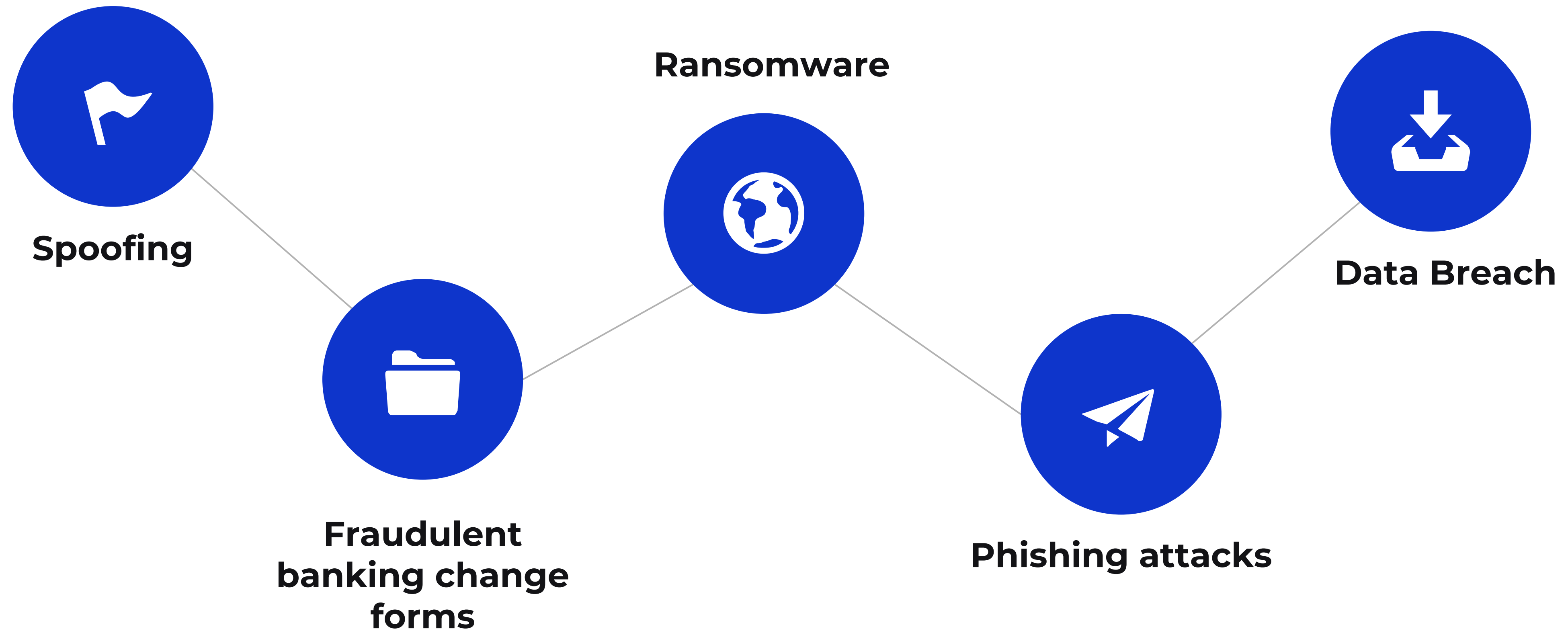
# Cyber Liability Insurance

- New requirements appearing in cyber insurance policies
  - Regular risk assessments & penetration testing
  - Incident response / business continuity plans
  - Ability to demonstrate security best practices
  - Monitoring and detection capability
  - Data loss prevention systems (just starting to see this)
- What should you be considering today?
  - Security policies – can you prove you do what you say?
  - Importance of EDR (Endpoint Detection and Response) vs. antivirus
  - Data Loss Prevention.
    - Example: Microsoft Purview



# Examples: Cyber Incidents

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# Insurance Attestation and Reporting

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- Importance of working with IT on attestations
- Timely reporting
- Know what is required based on type of incident



# When Cyber Incidents Happen

- Actual cost of an incident:
  - Downtime – 2 weeks or more
  - Revenue hit
  - Reputation hit
- Security Awareness Training - the human firewall
- Incidents are usually people failings, not technology holes

Check out our [Cyber Month Hub](#) for more resources!

# Polling Question #4





**Practical Tips – Use These Today**


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# Technology and Procedure Review





## Technology Review – Establish a Baseline

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- Hardware, software, and licensing inventory
- Document network infrastructure
- Document data center setups and cloud configurations
- Document messaging and collaboration solutions in use
- Scan for vulnerabilities – penetration testing, if possible
- Review downtime and outage history
- Review IT spending and budget allocation



# Technology Review – Next Steps



## 1. Identify gaps and opportunities

- Assess hardware and application performance
  - Focus on bottlenecks
  - Look for questionable configurations
- Assess licensing, especially Microsoft 365
- Identify and define your cloud adoption strategy
- Evaluate ROI of current IT investments
- Solicit end user feedback

## 2. Consider emerging technologies and trends that might be beneficial

## 3. Develop a technology roadmap



# Policy and Procedure Review

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**Engage key stakeholders!**



**Perform a security and compliance check**



**Gather all policy/procedure documentation – is it organized?**



**Train staff, communicate all changes**



**Identify gaps and opportunities**



**Strive for regular policy reviews and continuous improvement**

# Examples: Policies

- Acceptable Use Policy (AUP)
- Data privacy policy
- Password policy
- Information security policy
- Incident response (IR) policy
- Remote work policy
- BYOD policy
- Change management policy

Free SANS Institute policy templates:

<https://www.sans.org/information-security-policy/>



# Polling Question #5





**Effectively Implement Change**



# Overcome Resistance to Change

- 1 Take time to explain the “why”**
- 2 Provide a venue for feedback**
- 3 Allow adequate time for training and testing**
- 4 Create a supportive environment**



**Looking Forward**



# Innovative Solutions and Out-of-the-Box Thinking

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## Example: Electronic Approval with Audit Trail

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- Auditors are adapting to the electronic environment
- Leverage approval workflows within a general ledger system
- Use a specific bill pay automation and approval system
- Leverage Microsoft Forms, SharePoint, and Power Automate
- Third-party accounting workflow and close management software
- E-Signature and PDF software



# Cloud-Based Accounting Systems and Integrations

- Many legacy, on-premise solutions are being phased out
  - Microsoft Dynamics GP end of life was announced in September - 5 years (EOL 9/2025)
- New cloud-based software integrate with the Microsoft 365 Suite of applications
  - Business Central integrates seamlessly with Outlook, Excel, Power Automate, Power BI, CoPilot and more
- Cloud-based accounting systems integrate with other platforms
  - Payroll / AP / Electronic Medical Record / etc.
  - Eliminate manual data entry between systems
  - Provide leaders with real time dashboards and reports

- Gartner Top Technology Trends in Government (April 2024)

 Realize risk	 Reimagine value	 Evolve operations
<ul style="list-style-type: none"><li>• Adaptive security</li></ul>	<ul style="list-style-type: none"><li>• Digital identity ecosystems</li><li>• AI for decision intelligence</li></ul>	<ul style="list-style-type: none"><li>• Digital platform agility</li><li>• Programmatic data management</li></ul>

Agile Practice

- AI-driven intelligent applications that can learn and adapt are beginning to appear
- Machine learning, analytics, and generative AI will mature rapidly over the next few years

Resources:

<https://www.gartner.com/en/newsroom/press-releases/2024-04-16-gartner-announces-the-top-government-technology-trends-for-2024>





**Review**

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# Key Points

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## **POINT 1:**

Maximize Existing  
Technology

## **POINT 2:**

Enhance  
Productivity &  
Drive Efficiency

## **POINT 3:**

Cybersecurity  
Essentials

## **POINT 4:**

Future-Proofing  
with Technology



**Thank you for joining us!**

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