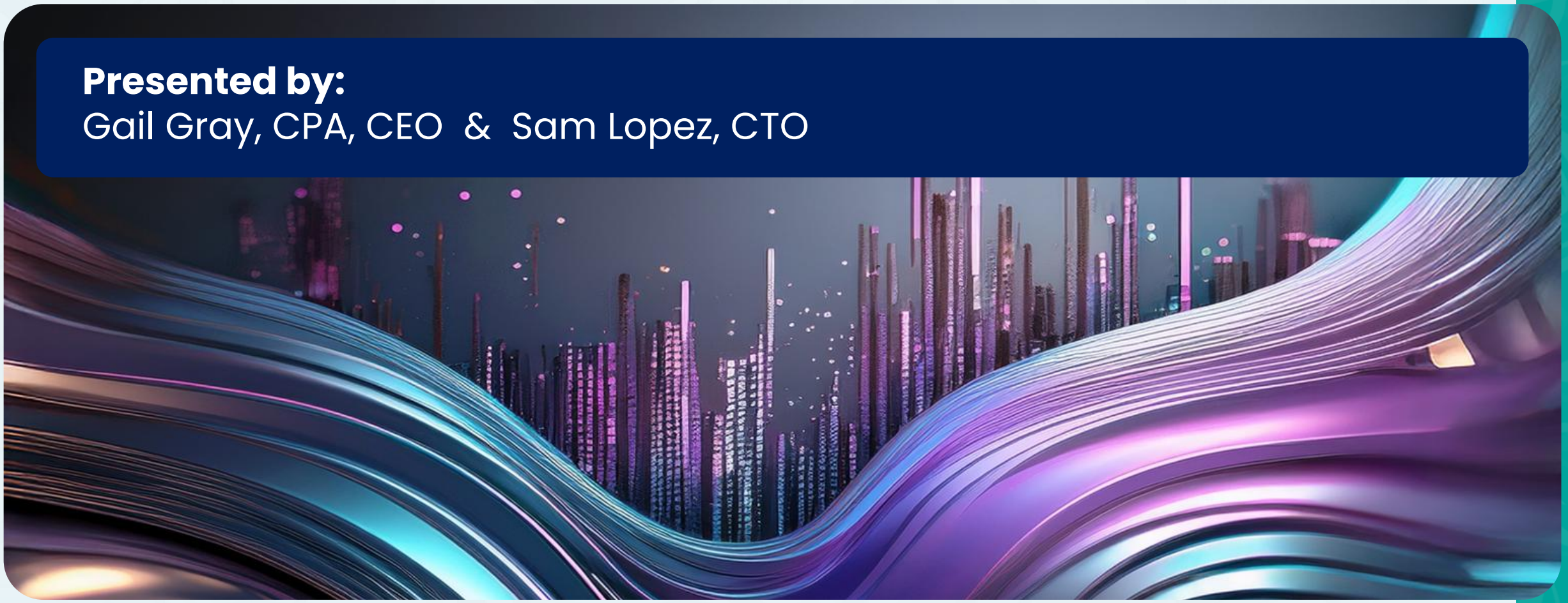
THE AUTOMATION JOURNEY

Presented by:
Gail Gray, CPA, CEO & Sam Lopez, CTO



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1:00 p.m. - 4:40 p.m.
Automating Year-End Close and Core Financial Processes:

Practical AI and Automation Strategies (Parts 1 & 2)

Learn how simple automation tools can streamline data collection, improve task coordination, and reduce manual errors common in closing and reporting processes. The speakers will walk you through examples of how local governments are already using AI and automation to simplify repetitive work, strengthen controls, and improve visibility during the close process.

Today’s Agenda

1. Introductions
2. AI Foundations for Finance
3. Using AI Tools in Finance Work
4. From Insight to Execution
5. Agents, Automation & Copilot Studio
6. Readiness, Governance & Next Steps

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Who We Are:

Gail Gray, CPA

- CEO – GrayLopez
- 30+ years in public-sector finance
- RPA/AI strategic leader
- Retired Partner LSL

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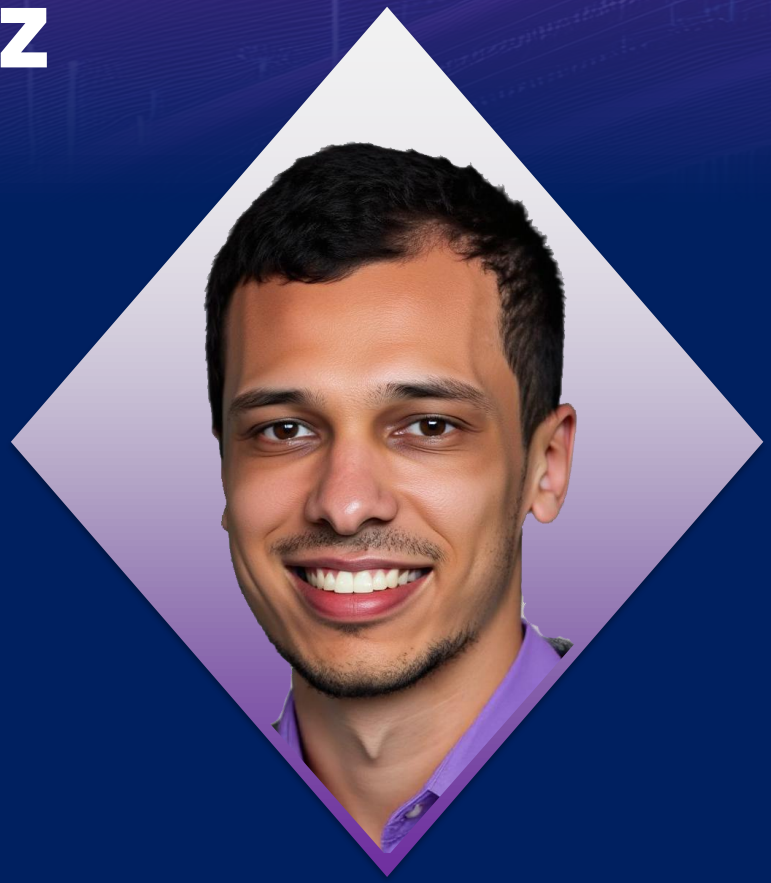
Who We Are:

Samuel Lopez



- CTO – GrayLopez
- 10 years leading enterprise automation.
- Automation Solutions Architect & Green Belt Lean Six Sigma certified
- Robotic Nation, firm founder

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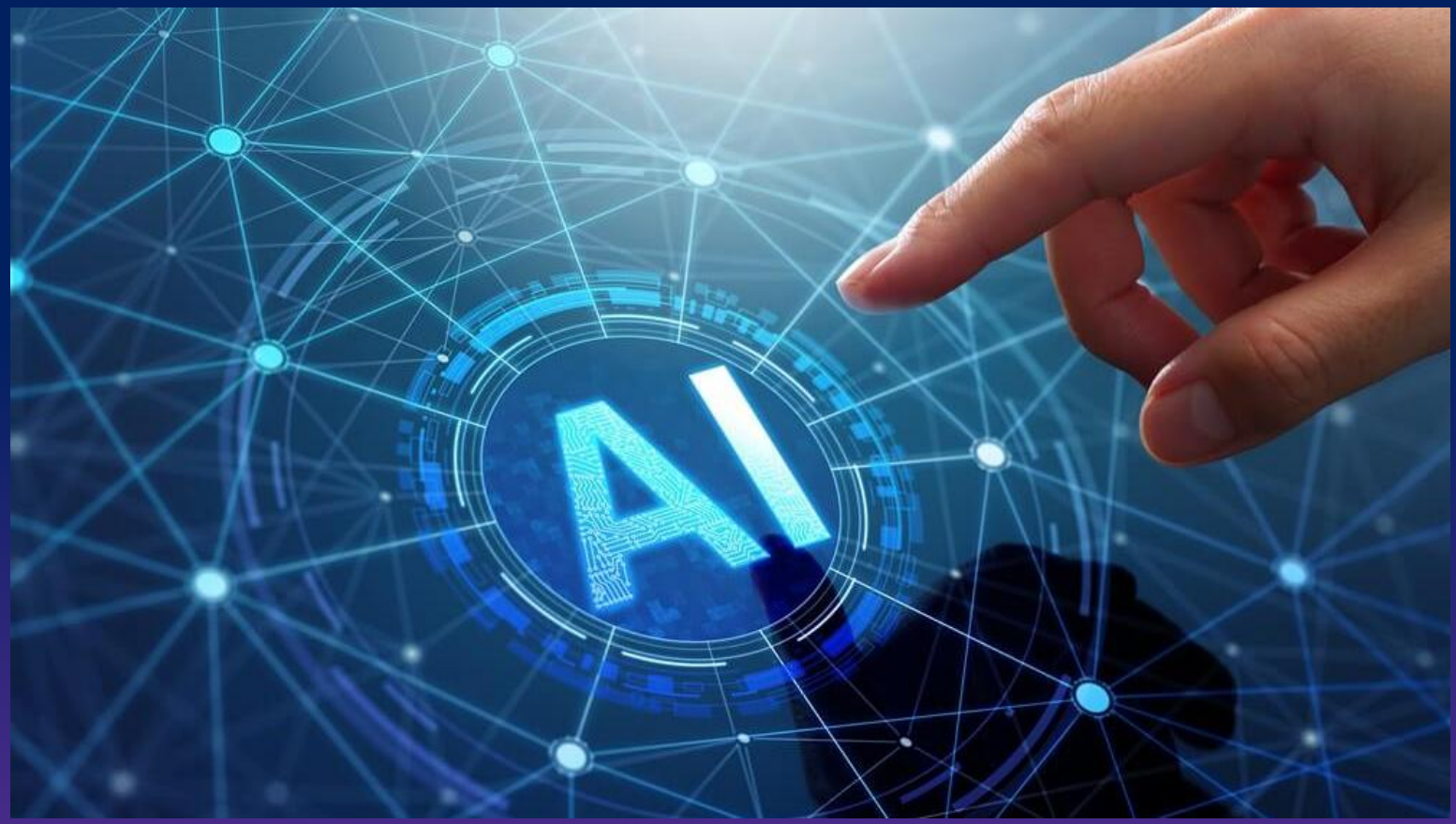

AI FOUNDATIONS
FOR FINANCE

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Why We're Here Today

AI is already changing how work gets done

Finance teams are being impacted first

This session focuses on understanding, not hype

Good decisions start with shared language

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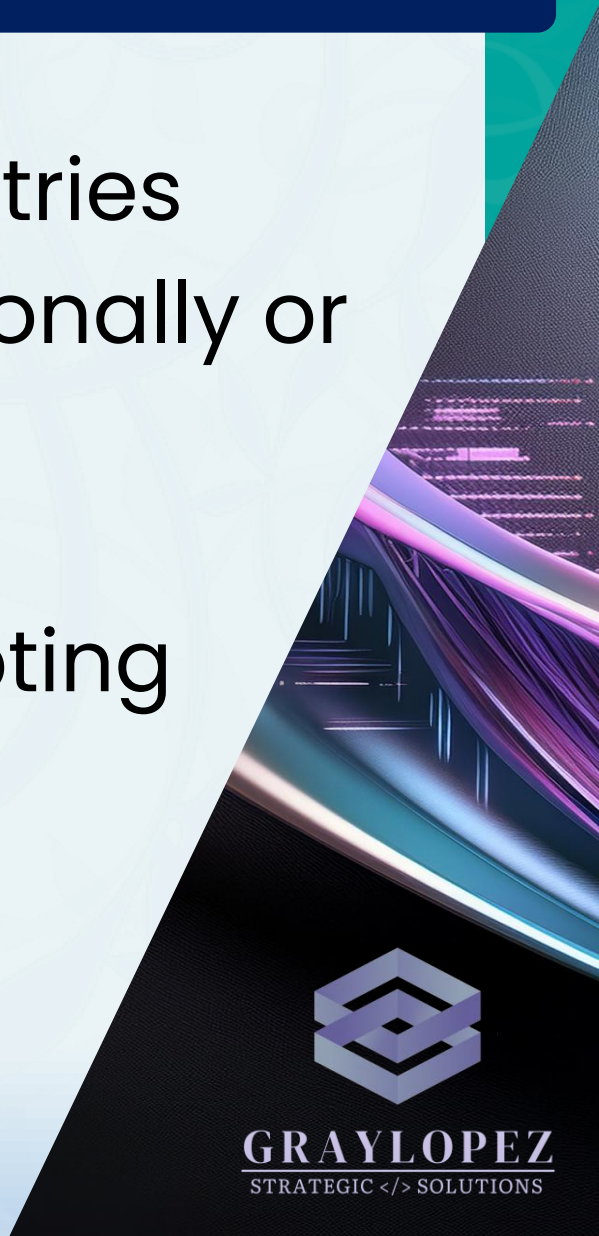
Why Are We Talking About AI Now?

- AI adoption is accelerating across all industries
- Finance teams are already using AI, intentionally or formally
- The question is no longer “if”, but “how”
- Today is about understanding before adopting

This session is not about replacing people, it’s about understanding what’s already here and how to use it responsibly.



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What Is Artificial Intelligence?

AI doesn't 'know' things

it predicts the most likely answer.

- Systems that perform tasks requiring human-like intelligence
- Recognizes patterns, makes predictions, and generates recommendations
- AI does not think, it calculates probabilities
- Output quality depends on data, rules, and context provided

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Why AI Is a Finance Conversation

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Why This Technology Feels Different

- Uses natural language
- Produces work instantly
- Sounds confident and authoritative
- Challenges how expertise shows up

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How We'll Use AI in This Workshop

- Watch real finance examples
- Practice using AI yourself
- Focus on judgment, not shortcuts
- Understand where AI fits and where it doesn't

AI supports thinking and review; it does not replace professional judgement.

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ChatGPT: A General-Purpose AI Assistant

Characteristics:

- Works with natural language
- Good at drafting, summarizing, and explaining
- Not connected to your systems by default
- Requires human review

How to use:

- Excellent for first drafts
- Powerful with good prompts
- Dangerous without review
- Value comes from how you use it

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ChatGPT vs Copilot

CHAT GPT	COPILOT
Secure, contextual, embedded	Broad, flexible, standalone

DIFFERENT TOOLS FOR DIFFERENT NEEDS – GOVERNANCE MATTERS

Copilot: AI Inside Your Environment

Same Engine
Different Guardrails

Uses your data context

Designed for enterprise use

Respects security and permissions

Embedded in Microsoft 365

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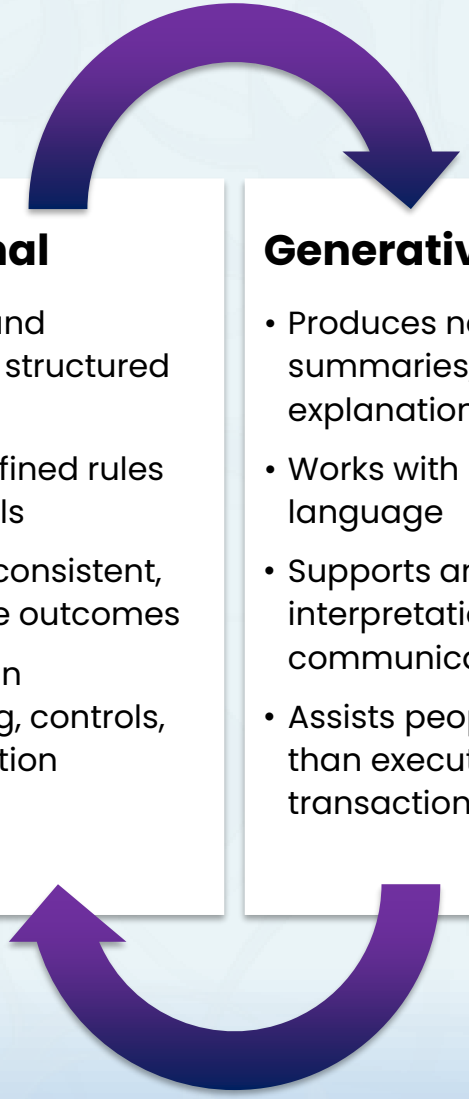
Traditional AI vs. Generative AI



Traditional

- Analyzes and processes structured data
- Follows defined rules and models
- Produces consistent, repeatable outcomes
- Common in forecasting, controls, and detection

Generative

- Produces new content, summaries, explanations
- Works with natural language
- Supports analysis, interpretation, and communication
- Assists people rather than executing transactions

Both AI types complement each other in modern business and finance.

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Traditional AI: Already in Finance

You’re already using AI; it just hasn’t been branded that way.

Fraud detection

Anomaly detection

Forecasting & trend analysis

Rules-based approvals& controls

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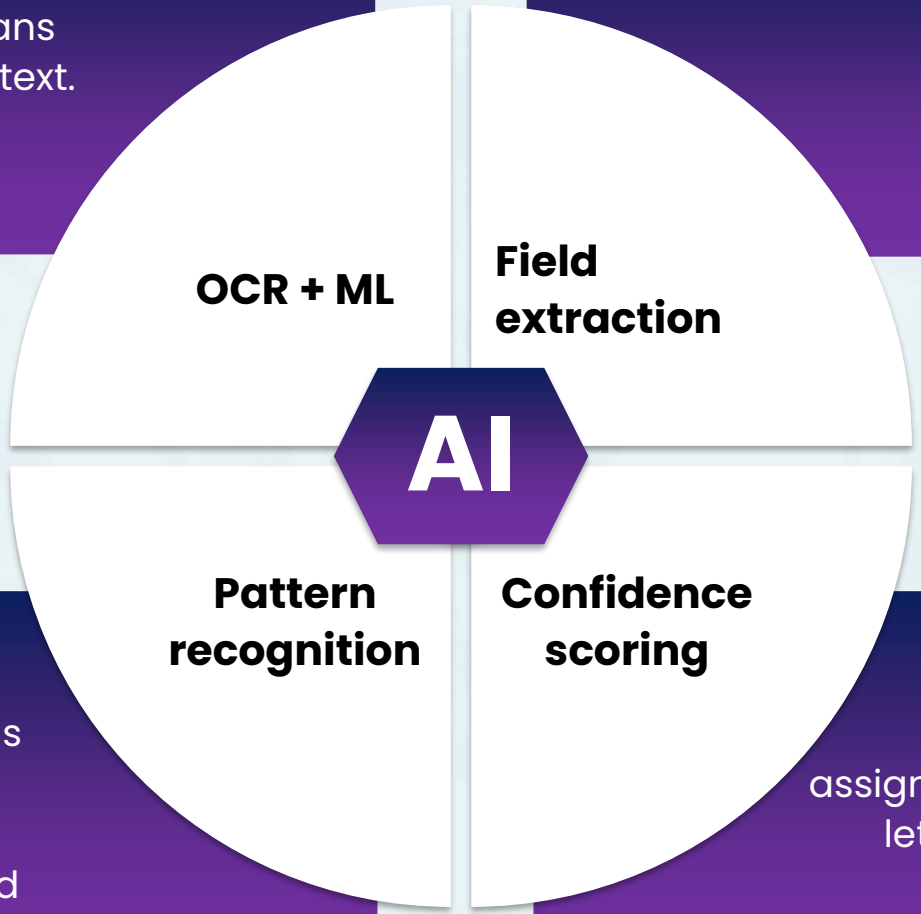
AI Utilization

AI reads invoices by converting PDFs and Scans into machine-readable text.

AI identifies and pulls key data automatically



AI learns from thousands of vendor invoices, recognizing layouts, repeating structures and exceptions.

Every field extracted is assigned a confidence score, letting the bot know what values are reliable

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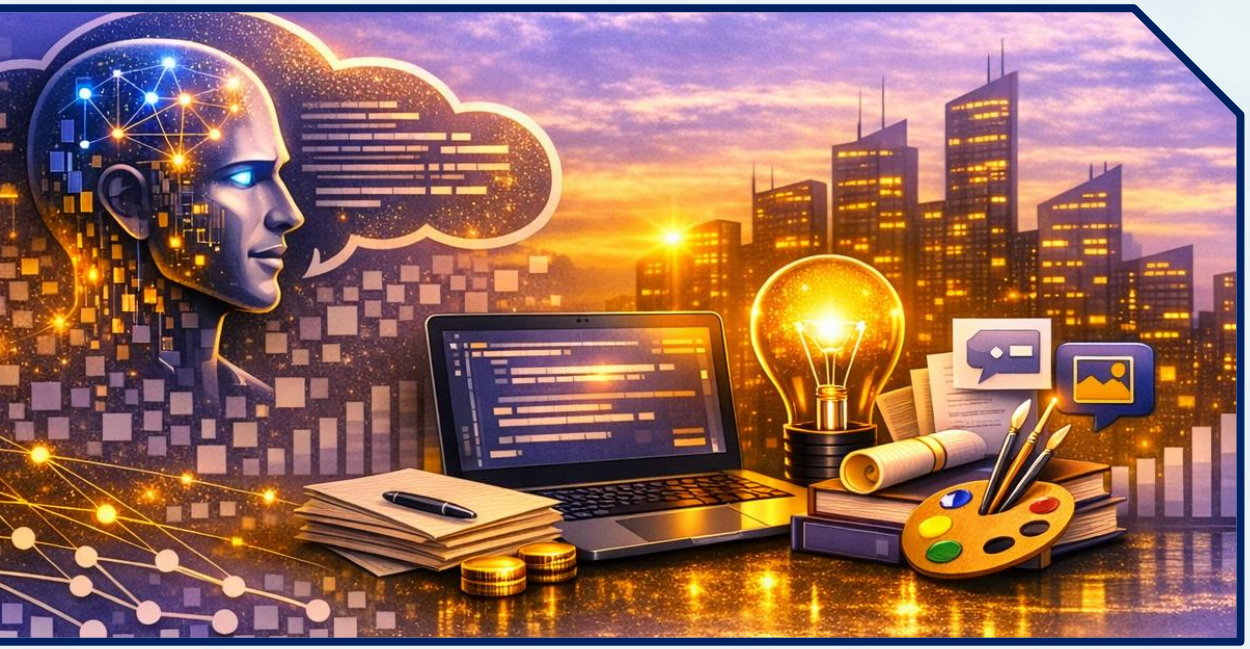
What Is Generative AI?



Examples:
ChatGPT, Copilot, Gemini

- Generates new text, images, summaries, and code
- Learns patterns from massive data sets
- Responds to natural language prompts

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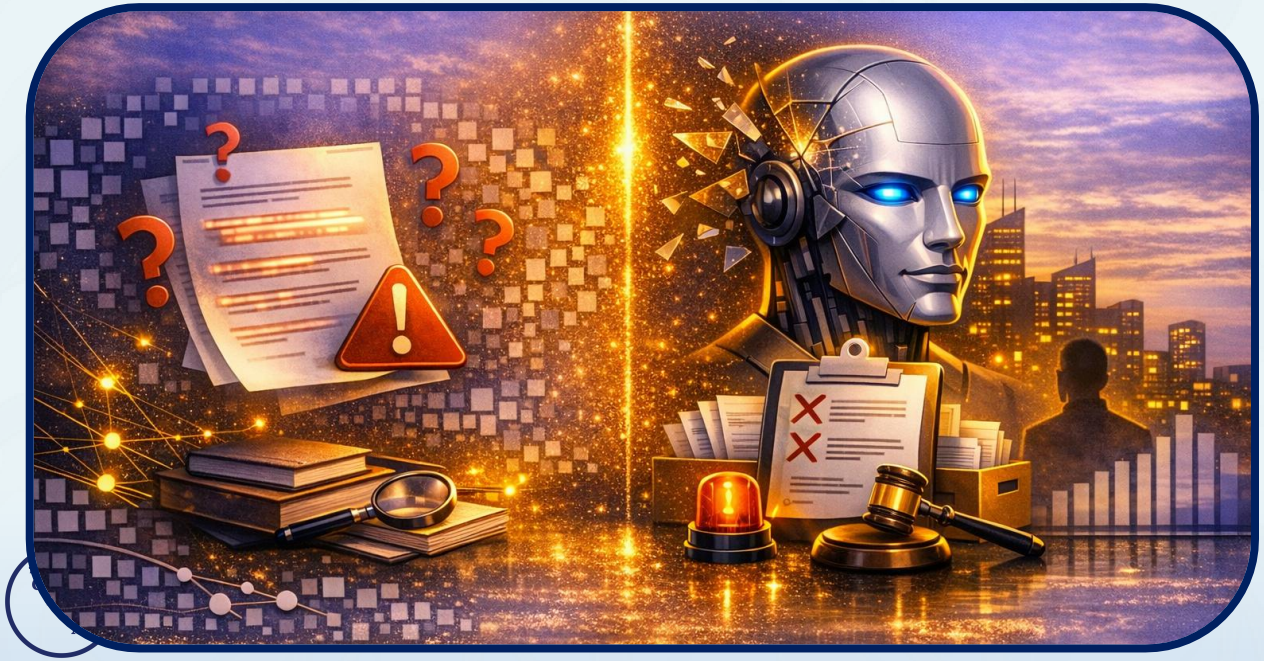
What Are AI Hallucinations?

- AI can generate confident but incorrect answers
- This happens when information is missing or unclear
- Risk increases without verification
- Human review is required



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Where You Must Be Careful

- Confident tone does not mean accuracy
- Citations may be fabricated
- Context must be provided
- Outputs must be reviewed

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What AI Is NOT

AI is not always correct

AI does not replace professional judgment

AI does not understand context unless you provide it

AI should not be trusted blindly

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Why This Matters for Finance Teams

- Volume of data continues to grow
- Deadlines are not getting longer
- Staff shortages and turnover persist
- AI can reduce low-value work

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What You’re About to See

- Real-world finance use cases
- Simple prompting techniques
- Strengths and limitations
- How to use AI responsibly

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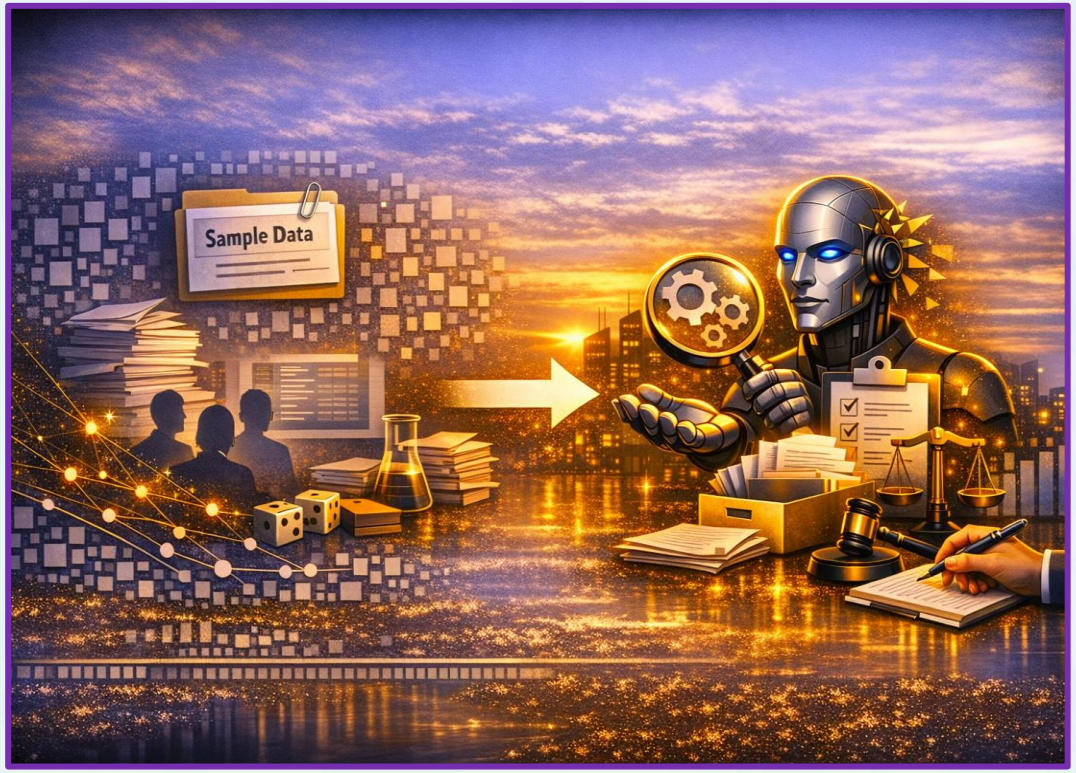
How We'll Work Through the Exercises

We'll start together, then you'll try it

Use sample or hypothetical data only

Focus on reasoning, not perfect output

Human review is always required



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USING COPILOT (WORK) **FOR FINANCE**

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Exercise 1:
MD&A Review with AI

- Open your ACFR PDF to the MD&A section
- Use Copilot to review, not rewrite
- Reference GFOA and GASB guidance
- Focus on clarity, organization, and risk
- Human judgment always applies

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Participant Prompt: MD&A Review

Act as a government finance reviewer.

Review this MD&A section using:
- GFOA best practices
- GASB MD&A guidance

Provide feedback on:
- Clarity and readability
- Explanation of key financial changes
- Organization and flow
- Areas needing additional analysis

Do not rewrite the MD&A.
Provide suggestions only.

Think of this as using AI the same way you'd use a junior analyst.
It can do surface observations, but **you decide** what matters.

Why Prompt Framing Matters

Prompt Framing:

- Define role
- Provide clear context
- Specify constraints (must do/must not do)
- Define Output

AI responds to how the request is framed

- Small wording changes produce very different outputs
- Context assumptions influence results
- Specificity improves reliability
- You are directing the reasoning

Exercise 2:
Drafting Local & State Factors

- Use AI to assist with narrative development
- Focus on external economic & governmental factors effecting your local government
- Incorporate impacts reflected in council actions, community events and economic conditions.
- Explain factors contributing to year-over-year financial changes
- Generate structured draft language
- Evaluate for accuracy, relevance and completeness
- Human judgment and verification required

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Participant Prompt: Local / State Factors

Act as a government finance professional.

Draft a section for an ACFR Management's Discussion & Analysis (MD&A) titled: "State and Local Factors Affecting Financial Condition"

Focus on external economic and governmental factors affecting [Insert Your Org Name Here] including:

Discussion of:

- State-level fiscal or regulatory conditions
- Local economic conditions and community events
- Council (or board) actions, policy decisions, or known governmental changes
- How these factors contributed to year-over-year changes in financial results
- Revenue sensitivity to economic activity
- Known cost pressures or risks

Parameters:

- Use a professional government reporting tone.
- Do not fabricate specific events or data.
- Base explanations on known or documented local context
- Keep the language suitable for a published ACFR.

How to Use Copilot for This Exercise:

1. **Work mode first** use your internal documents
2. **Review the output**
3. **Web mode only if needed** use a separate prompt


From Insight to Execution:
Applying AI to Do the Work

Exercise 3: Financial Modeling with Copilot

- Work directly within Copilot
- Use prompts to generate Excel logic
- Focus on assumptions and drivers
- Evaluate formulas and structure
- Human review remains essential

You'll build a simple effort + cost estimator (assumptions → hours → cost → summary).

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Your Task

- Remain inside Copilot
- Prompt Copilot to create an Excel model
- Allow Copilot to launch Excel
- Review formulas and calculations
- Adjust assumptions as needed

Participant Prompt: Excel Logic

Create an Excel workbook to estimate process effort and cost for a finance process.

Requirements:

1. **Sheet: Assumptions**
   - Inputs: Process name, period (Monthly/Annual), transaction volume per period, average minutes per transaction, exception rate %, exception minutes per exception, hourly labor rate, overhead factor (optional).
   - Clearly label units (minutes, hours, dollars) and period basis.
2. **Sheet: Estimated Hours**
   - Calculate Base Hours, Exception Hours, Total Hours using formulas.
   - Use cell references (no hardcoded results).
3. **Sheet: Estimated Cost**
   - Calculate Labor Cost and Fully Loaded Cost (if overhead factor provided).
4. **Sheet: Summary**
   - Display Total Hours, Total Cost, Cost per transaction, and the key assumptions used.

Use formulas only (no static totals). Add simple formatting for readability.
Do not invent real organizational data, use placeholder default assumptions that I can edit.

Participant Prompt: Review Logic

Explain how this workbook works.

Include:

- The key assumptions (with the cell locations or named ranges)
- The exact formulas used to calculate:
  - Base Hours
  - Exception Hours
  - Total Hours
  - Total Cost
- What inputs must be validated (units, period basis, rates, exception handling)
- Any risks or common mistakes (e.g., mixing minutes vs hours, monthly vs annual)

From Calculations to Logic

- Excel demonstrated AI-assisted modeling
- AI can also reason with financial structures
- Pattern recognition is a core AI strength
- Accounting logic is highly structured
- **Next:** Account Crosswalk

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Exercise 4:
Account Crosswalk & Structural Logic

- Crosswalks preserve reporting continuity
- Account mappings reflect classification decisions
- Structural inconsistencies create downstream risk
- AI excels at identifying patterns and anomalies
- Human validation remains essential

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What AI Will Evaluate

- Mapping consistency
- Numbering patterns
- Classification logic
- Structural anomalies

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Your Task

Upload the Account Cross-Reference XLSX file into Copilot

Prompt AI to perform the mapping logic

Review AI-applied account numbers

Validate property consistency

Identify items requiring human judgment

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Participant Prompt: Account Crosswalk

Cross reference document.

Compare the old account numbers from the Account Cross Reference tab
to the account numbers on the CaseWare tab.

Add a new column for New Account Numbers.

Do not replace existing account numbers.

Assign properties to the new numbers
based on the properties of the old numbers.

Review the AI Output

- Confirm original account numbers remain unchanged
- Verify new account numbers where mappings exist
- Expect blanks for old unused accounts
- Validate account property assignments
- Identify exceptions requiring review

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Key Takeaway

- AI reasoned with structured financial data
- Outputs reflected logic rather than guesswork
- Prompt clarity shaped the results
- Human validation remained essential
- AI supported professional judgment

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Where Chat Tools Stop

- They answer
- They don’t execute
- They don’t verify outcomes
- They still need a human owner

Output is not the same as outcome

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What is RPA

(Robotic Process Automation)

- Bots follow rules
- Repetitive tasks
- High Volume
- Computer-based
- Highly Manual
- Cross-system execution
  - Bots move data across all systems end-to-end
- Human middleware reduction
  - Automation eliminates manual “copy-paste” work between those systems

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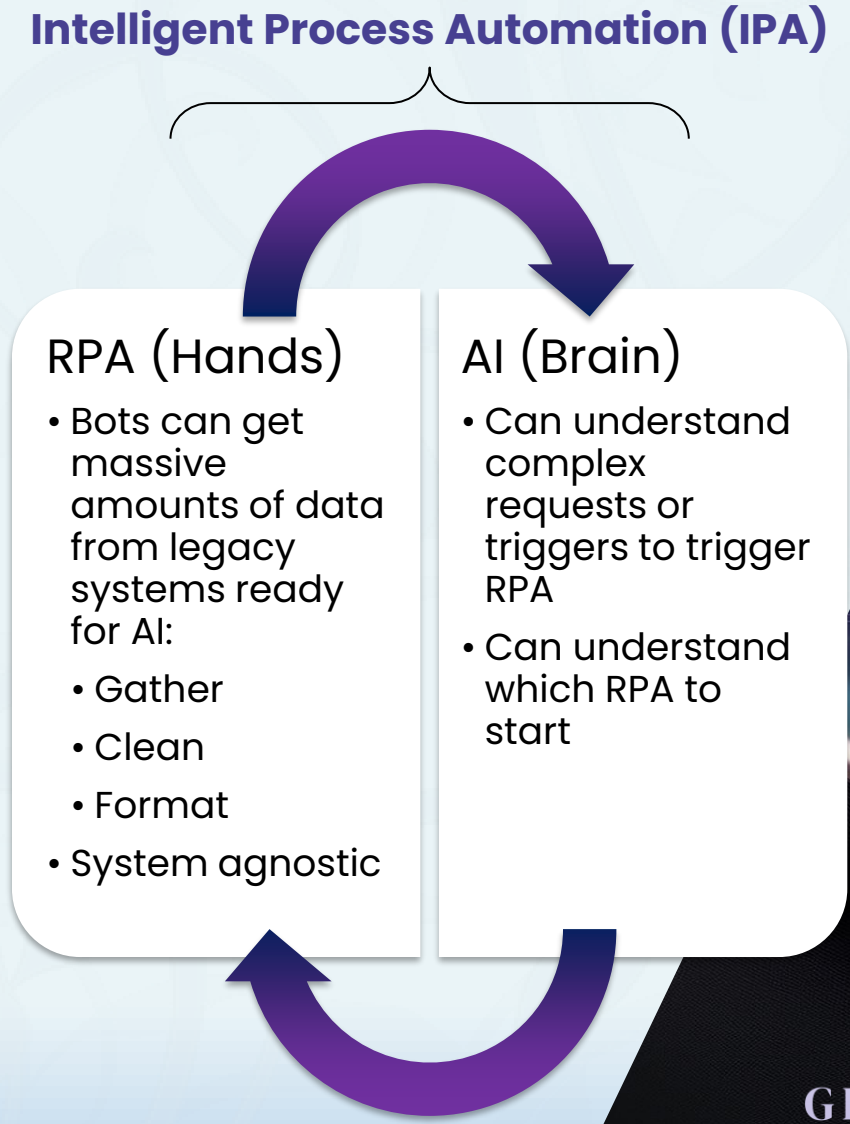
RPA & AI: Complementary Roles

- RPA executes defined processes
- AI supports decisions and judgment
- RPA delivers consistency.
- AI delivers adaptability
- AI manages exceptions intelligently, and RPA manages the structured steps.



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Possible Impacts of AP Automation

Operational Efficiency

- Dramatically reduced AP Processing time
- Fewer manual touchpoints -> less rework and fewer delays

Visibility & Control

- Real-time tracking of invoices across departments
- Stronger, consistent audit trail

Staff Experience

- Team shifted from manual entry to higher-value analytical work
- Less burnout; greater capacity to absorb volume growth

Data Quality & Consistency

- Cleaner inputs, standardized extraction, and fewer exceptions
- Uniform application of rules and GL coding

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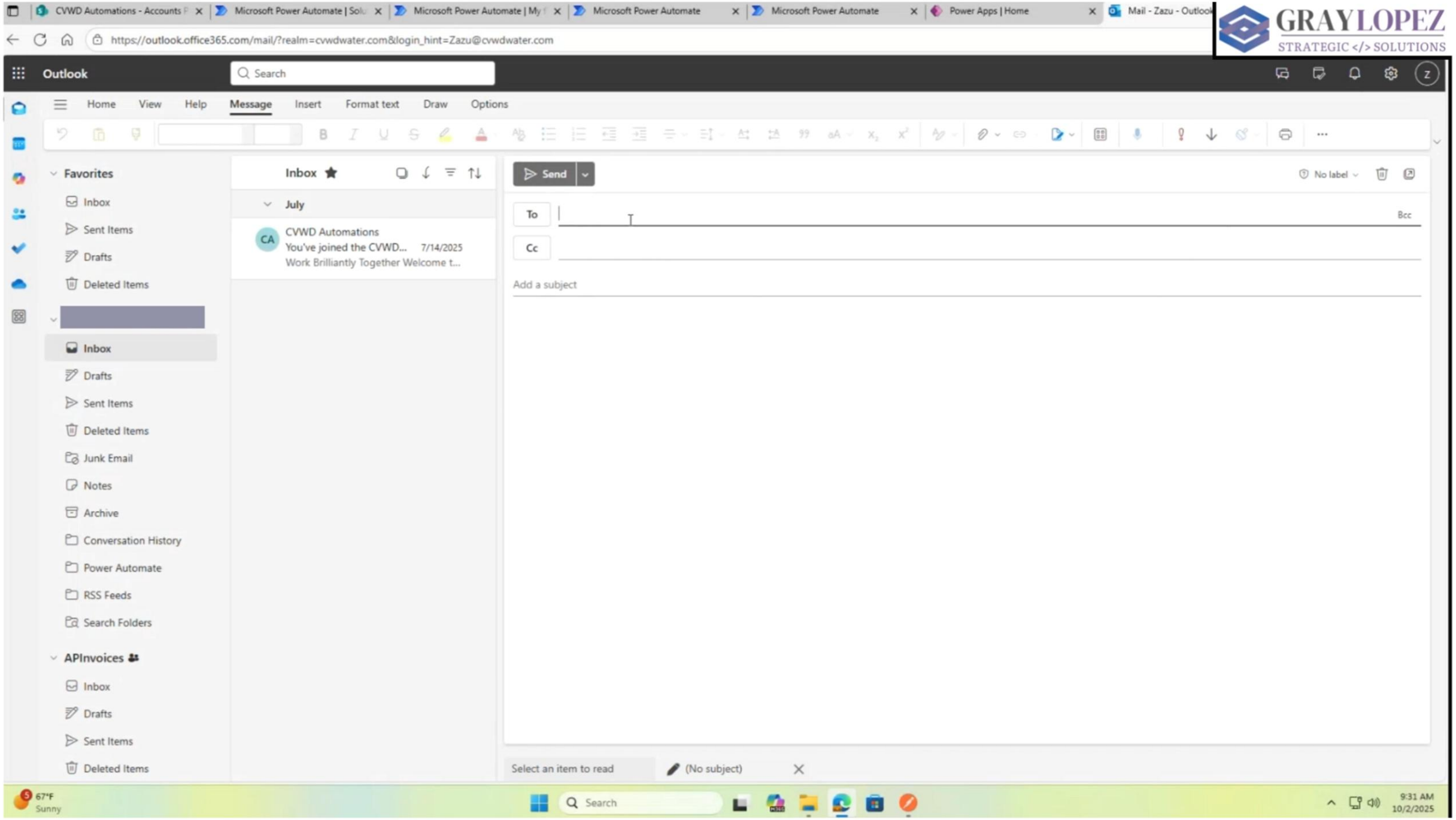
AUTOMATION WALKTHROUGH: **VIDEO HIGHLIGHTS**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Format text
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From AI Tools to AI Agents

Agents take action

Agents follow instructions

Agents operate within workflows

Agents require governance

Q&A

Goals of this Session

Understand what AI Agents, Agent mode in Excel, and Flows are

Identify where these tools apply in your day-to-day finance work

See these tools in action through live demos

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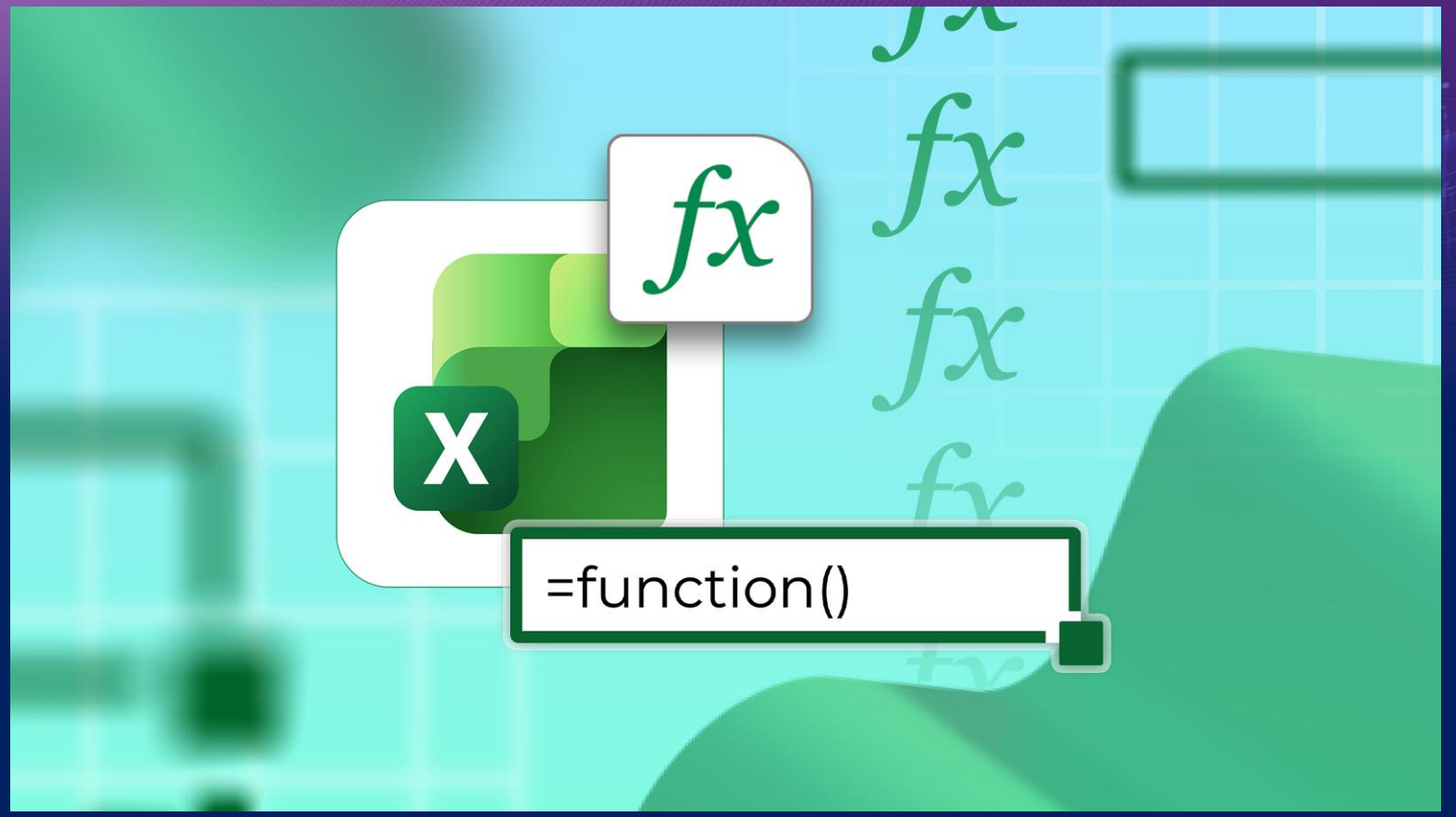

AGENT MODE
FOR MICROSOFT EXCEL

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Unlock Excel's AI superpower

Excel's **Agent Mode**

Build and edit workbooks side by side with Copilot.

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Before vs After – Agent Mode

BEFORE: Traditional Excel Work
(How most people work today)

What the user does
- Opens raw or messy data
- Thinks through the steps manually
- Builds formulas one by one
- Creates pivots and charts manually
- Adjusts formatting and layout
- Repeats the same process every month

What it feels like
- Many clicks and copy/paste
- Easy to miss steps or make mistakes
- Heavily dependent on Excel expertise
- Time spent on *how* instead of *why*

Typical timeline
- 30–60 minutes (or more)
- Longer if the file structure changes

AFTER: Using Copilot Agent Mode
(Outcome-driven work)

What the user does
Describes the goal in one prompt
"Create a clean monthly sales report with totals, trends, and a dashboard."

What Agent Mode does
- Breaks the task into steps
- Cleans and structures the data
- Applies formulas and business logic
- Builds summaries, pivots, and charts
- Executes everything directly in Excel

What it feels like
- One clear instruction
- Fewer decisions and clicks
- Focus shifts to validation and insight

Typical timeline
- Minutes instead of hours
- Same quality every time

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Chat mode answers questions. Agent mode does the work.

You describe the outcome. Agent Mode plans the steps and executes them in Excel.

Restructure an existing workbook

Prompt:
"Reorganize this workbook: move raw data to one sheet, summaries to another, and standardize formatting."
Output:
•Clear sheet separation
•Improved structure
•Consistent formatting
•Easier navigation

Create a dashboard

Prompt:
"Build a dashboard showing expenses by department, month-over-month"
Output:
•Pivot tables
•KPIs
•Charts and visuals
•A dedicated dashboard sheet

Clean and prepare messy data

Prompt:
"Clean this dataset: remove duplicates, standardize date formats, and rename columns to be readable."
Output:
Duplicates removed
Dates and numbers standardized
Clear, consistent column names
Data ready for analysis

Agent Mode = instructions → plans → actions → results

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Demo 1:
Unlock Excel's superpower

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Tips when working with agent mode

Be clear and outcome-focused with prompts

Start with what you want (e.g., “build a monthly budget tracker with charts”) rather than vague or abstract descriptions.

Agent Mode plans and reasons before acting

It breaks the task into steps, executes them, and reflects on whether the outcome matches your intent. You can watch this reasoning.

Be careful when working with sensitive or shared files

Agent Mode makes direct changes to your workbook.

Agent Mode only works with the currently open workbook…

It can't access other files, emails, or enterprise data.

Agent Mode is best for complex, multi-step tasks

like reshaping data, merging sheets, or building reports with multiple elements.

For complex requests…

Agent Mode may take a few minutes to generate an initial response and refine it, while it's running, you’ll see its reasoning in the pane

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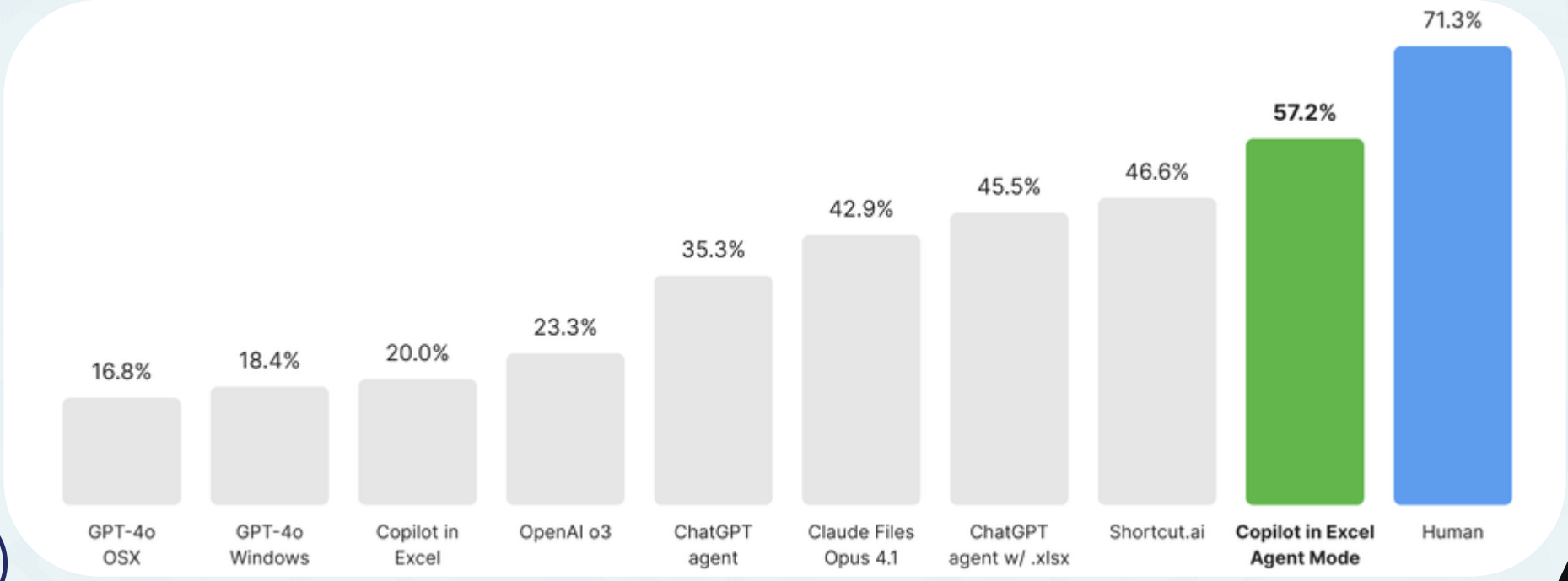
SpreadsheetBench Accuracy Results

SpreadsheetBench evaluates large language model agents' capabilities in manipulating complex real-world spreadsheets

Excel's Copilot Agent Mode was measured on both internal evaluation sets and the public SpreadsheetBench benchmark. The results on SpreadsheetBench place Agent Mode at the leading edge of current systems, accurately completing 57.2% of the benchmark's tasks



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Source Links

- Microsoft Support Article: ***Agent Mode in Excel***
- Microsoft Excel Blog: ***Building Agent Mode in Excel***

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AGENTS, FLOW AND COMPUTER-USING AGENTS

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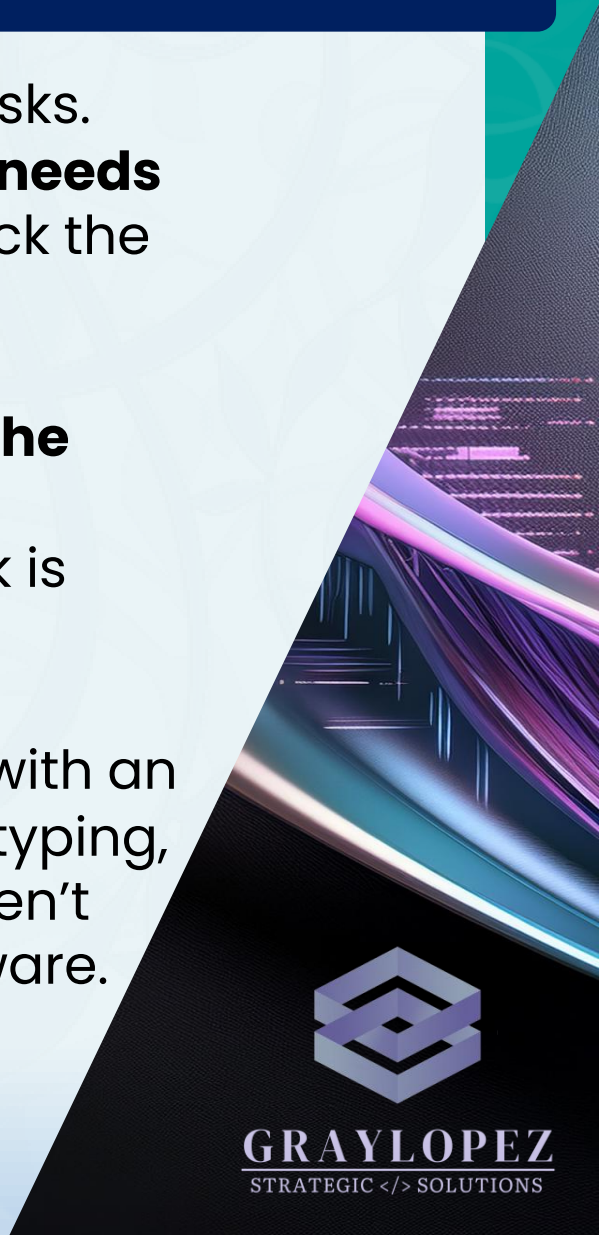
Automate your processes with

Agents: Agents are AI assistants that understand your questions or tasks. They think through the problem using company data and decide **what needs to be done**. Agents know how to reason, ask clarifying questions, and pick the right tools to complete your request.

Flows: Flows are step-by-step workflows that tell an Agent **how to do the task**. They connect different actions and systems, like Excel, Outlook, or SharePoint, into a reliable, repeatable process. Flows make sure the task is done consistently every time.

Computer Using Agents: Sometimes there's no direct integration with an app or system. Computer Using Agents **act like a human user** clicking, typing, and navigating applications or websites to perform tasks where APIs aren't available. They let Agents extend automation to legacy or custom software.



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What can you build with AI?

What You Can Do with Copilot Studio (Real Examples)

- **Answer company-specific questions**
  "What is our travel expense policy?"
  → AI answers using your internal documents, not the internet.

- **Automate repetitive tasks**
  "Sort these invoices by vendor and month."
  → AI analyzes the files and completes the task automatically.

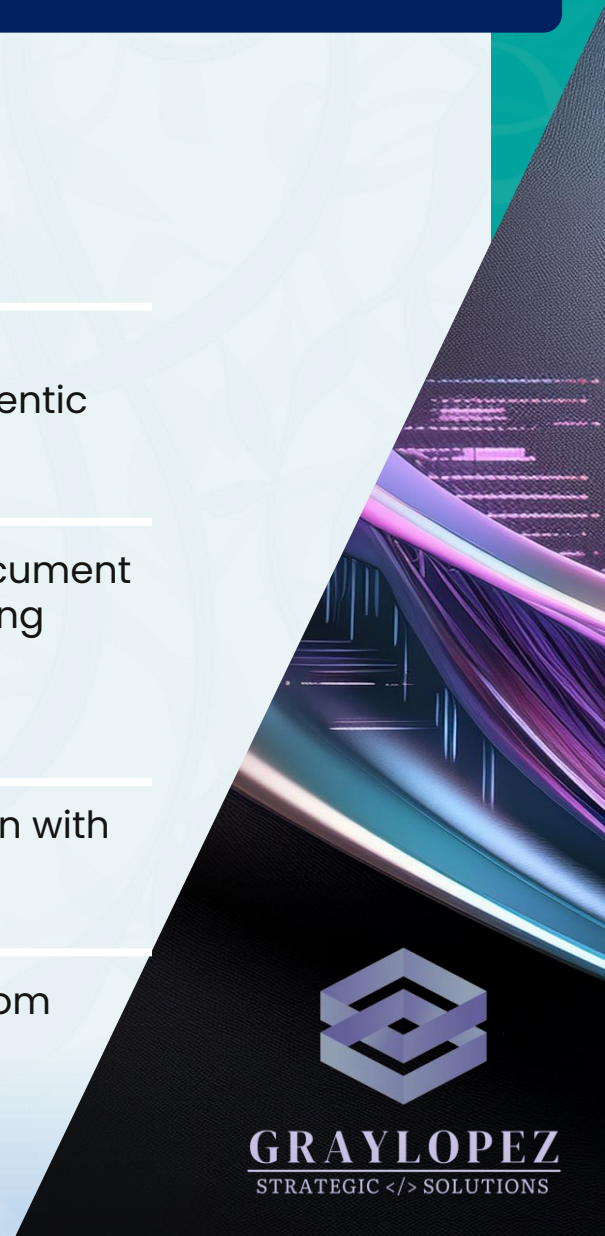
- **Guide users through processes**
  "How do I request a budget increase?"
  → AI explains the steps and triggers the request workflow.

- **Prepare summaries and explanations**
  "Summarize this financial report for leadership."
  → AI creates a clear, business-friendly summary.

- **Take actions across Microsoft tools**
  "Create folders, move files, and notify the team."
  → AI works across Excel, SharePoint, Outlook, and Teams.

Tools you can use to automate your processes

Criteria	Copilot Studio ⭐	Power Automate	UiPath	N8N	Claude
Primary purpose	Conversational AI agents & copilots	Workflow & process automation	Robotic process automation (RPA)	Workflow automation & integrations	AI reasoning, analysis & agentic tasks
Automation type	Conversational AI, AI agents	Process flows, RPA desktop	UI automation, attended/ unattended bots	API & app integrations, ETL	AI agents, document analysis, coding
Public sector fit	Government cloud available	GCC / GCC High available	Strong gov sector track record	Self-host = data stays on-prem	Enterprise plan with data controls
Technical skill needed	Business analyst level	Business analyst level	RPA developer / IT team	IT / developer familiar	Any level — from chat to API



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AI Agents

Agents are AI-powered assistants you create to perform tasks, answer questions, automate processes, and support users across apps, websites, Teams, and more. They're designed directly in Copilot Studio, using natural language and intuitive tools.

What can agents do:

- Engage in natural conversation with users to understand needs and respond intelligently.
- Take actions, such as sending messages, gathering data, triggering processes, or updating systems.
- Use logic and workflows, powered by agent flows, to automate repetitive or multi-step tasks.

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AI Agents – How to build them?

Tell it where to start

Define **triggers** that launch the agent's workflow like a user prompt, keyword, or Power Automate signal.

Give it input needed

Provide the agent with **knowledge**: facts, models, memory, and goals so it can interpret context and make decisions.

Give it access to systems

Equip it with **tools** and connections. APIs, flows, plugins, and servers to perform actions beyond conversation.

Tell it what to do

Set **instructions** that define its purpose, tone, and boundaries, ensuring consistent and safe behavior.

GFOA

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Microsoft Copilot Studio

How It Works

1. You tell Copilot Studio what you want your agent to do.
2. The system turns your instructions into automated tasks.
3. It can connect to tools like Teams, Excel, SharePoint, and several external tools as well.
4. The agent can then answer questions and perform actions anytime.

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Demo 2:
AI Agent

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Flows

Agent Flows are **rule-based automation workflows** in that allow execute **repeatable business processes** consistently and reliably.

- Automate repetitive tasks(send messages, update records, gather info, etc.)
- Connect your tools and systems(SharePoint, email, data sources — all working smoothly together)
- Run when you need them– on a schedule– when something happens– or when your Copilot agent asks

Why They Matter:

- Deterministic (same input → same output)
- Designed in the visual flow designer or via natural language
- Can be used directly by agents as tools ("Run a flow from Copilot")

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Flow

How They Work

Trigger – “What starts the process”

Examples:

- A message arrives
- A time of day Your Copilot agent needs something

Actions – “What the flow does”

Examples:

- Sends a notification
- Looks up information
- Updates a list or form
- Posts to Teams

Flows are the engine that lets the AI “do things” instead of just “say things,” making everyone’s work easier, faster, and more reliable.

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Demo 3:
Flows

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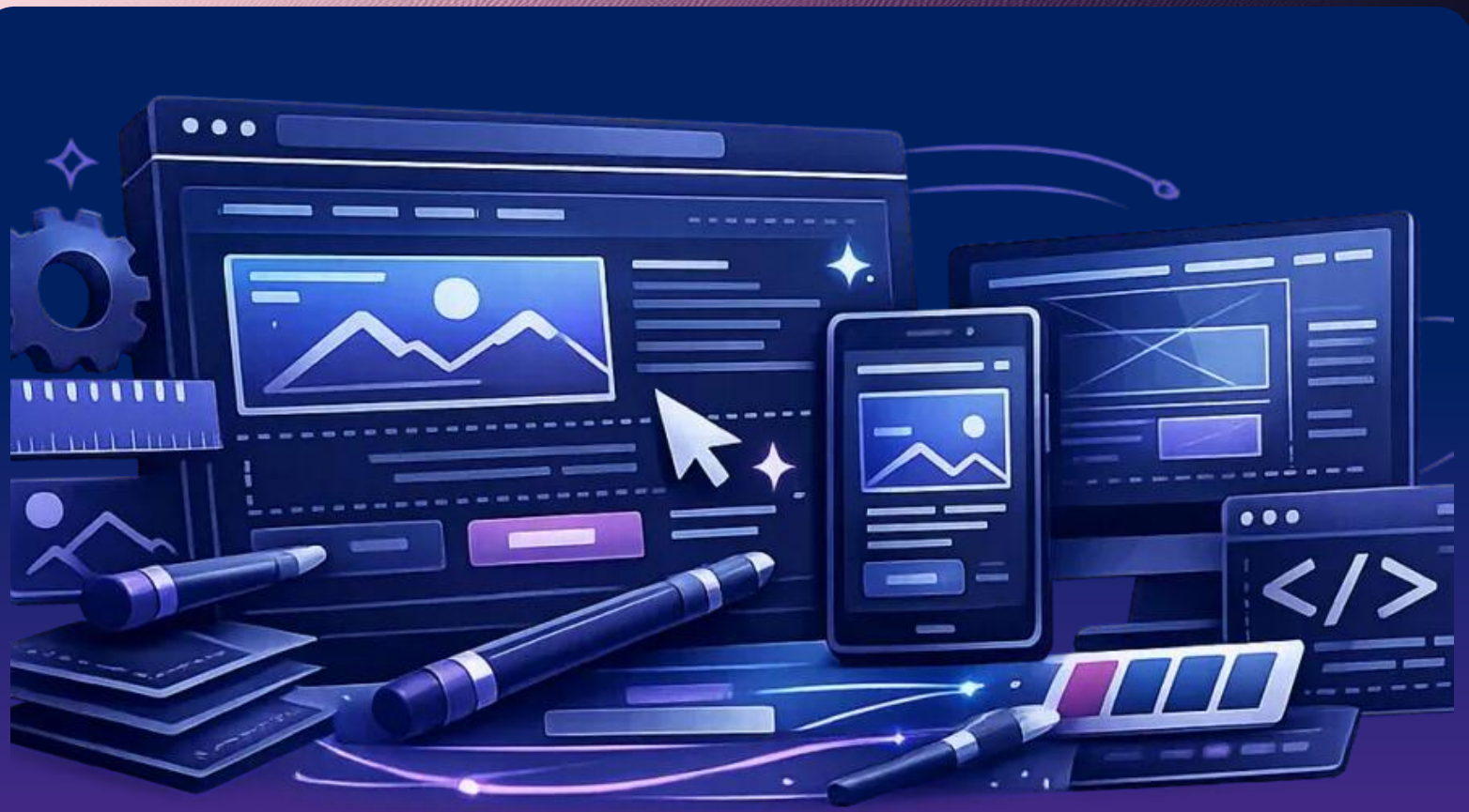

COMPUTER USING AGENT

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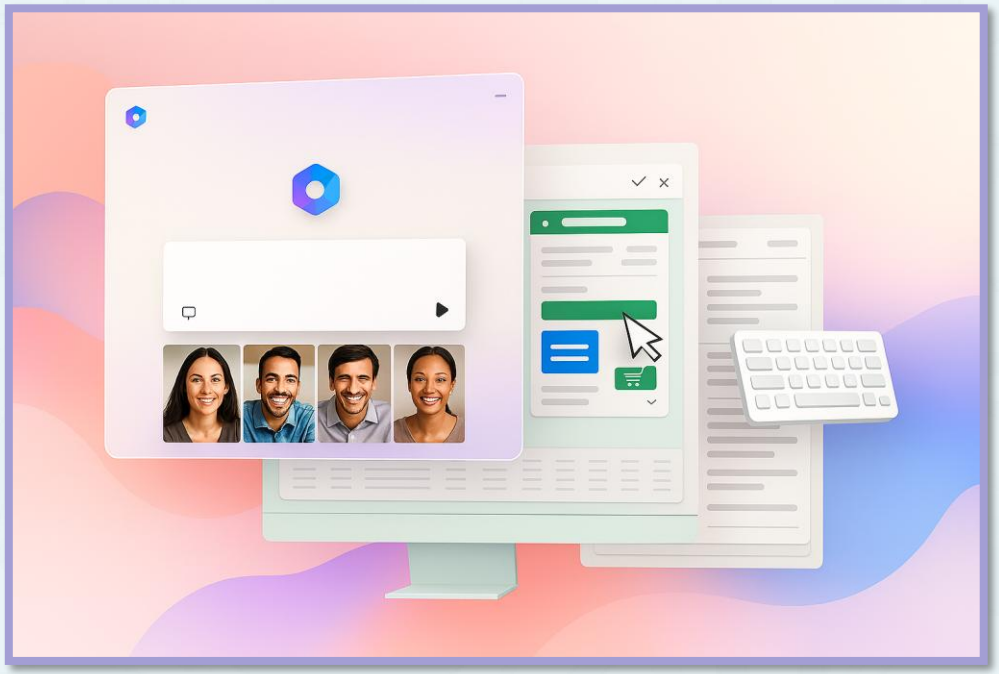
Automate web and desktop apps with computer use

Computer Use



Imagine This…

You tell Copilot *what you want done,* in plain language, and it uses a computer just like a person would:

- 🖱️ Clicking buttons
- ⌨️ Typing text
- 📂 Opening apps or websites
- ➡️ And it does this automatically for you.

No programming, no APIs just natural instructions.

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Automate web and desktop apps with computer use

Computer Use

- **It's like having a digital assistant** that can *operate your computer for you*
- It *sees* the screen and *interacts* with it — exactly like you would
- If you can do the task manually, Copilot's "computer use" can do it, too

What It Can Do

Examples of tasks it can handle:

✓ Fill out forms on websites
✓ Move data from one app to another
✓ Extract info from dashboards
✓ Process invoices automatically

Why It's Powerful

- **No code required:** Just describe what to do in plain English
- **Works with any app you can see on screen** — even if there's no technical hookup (API)
- **Adapts in real time:** If the buttons or screens change, it keeps working without breaking

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Computer Use VS Flow/RPA

Aspect	RPA (Robotic Process Automation)	Computer Use (AI-Powered UI Automation)
Setup & Expertise	Requires expert design and setup to tailor automation to your processes — we handle that for you	Easy to get started — gives quick wins with simple, no-code instructions
Reliability	Built for large-scale, repeatable processes — runs consistently without errors	Best for flexible tasks but may need adjustments if screens or apps change significantly
Task Complexity	Ideal for complex workflows involving multiple systems and large data volumes	Great for quick tasks that need human-like interaction with apps without backend access
Integration	Connects deeply with your business systems, APIs, and databases to streamline operations	Works by controlling the computer screen — no technical integration required
Business Impact	Saves significant time and cost on high-volume processes — boosts accuracy and compliance	Helps free up staff by automating small, repetitive tasks quickly and easily

RPA reliably automates repetitive tasks by following fixed rules, perfect for consistent, high-volume processes while Computer Use offers more flexibility by adapting to changes and interacting with the computer like a human."

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Demo 5:
Computer-using agent

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Q&A

You must have these to begin your Automation Journey:

- ❑ **Engaged Staff**

  Staff understand the “why,” participate in discovery, and contribute to the process

- ❑ **Stable Processes**

  Documented, consistent workflows that automation can reliably execute.

- ❑ **Understanding of Data**

  Know where the data relevant to the processes comes from and how it is typically sourced.

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Why Readiness Matters

- Automation amplifies existing processes
- Data quality drives outcomes
- Process stability enables scale
- Governance reduces risk
- Readiness determines success

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Automation Readiness Reality

- Clean, reliable data
- Defined, stable processes
- Clear ownership & governance
- Executive alignment
- Realistic expectations

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The 5 Steps of Your Automation Launch

1. *Automation Workshop*

- ✓For Leadership + Operations
- ✓AI
- ✓ML
- ✓RPA
- ✓How to ID Automation-ready processes
- ✓Best Practices

2. *Process Selection*

- ✓Analyze workflows
- ✓Stakeholder Interviews
- ✓Process Mapping
- ✓Uncover High-Value Opportunities
- ✓Initial Assessment of impact & feasibility

3. *Pipeline Creation*

- ✓Build pipeline that ranks opportunities by impact and ROI
- ✓ID “Quick Wins”
- ✓Guides for long-term projects
- ✓Enable scalable growth

4. *Process Recording*

- ✓Involves stakeholders and operators for maximum understanding
- ✓Detailed recording and process mapping
- ✓Results in workflow documentation that will be included in Roadmap Doc

5. *Roadmap Document*

- ✓Ready for Executives and Decision makers
- ✓Ready for Launch
- ✓Process prioritization
- ✓Implementation timeline
- ✓Costs + Licensing Estimates
- ✓Recommended Infrastructure
- ✓Clear ROI
- ✓Savings forecast

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Q&A

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