Navigating the Digital Transformation Landscape

Empowering organizations to achieve agility, efficiency, and sustainable growth through the strategic alignment of technology, people, processes, and business strategy.
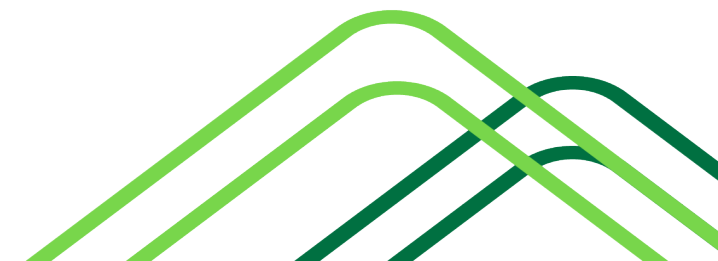
Qualifying for CPE

Remain in session for **50 minutes**

Respond to 3 **polling questions**

Complete post-session **survey**

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Receiving CPE Credit

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Introductions & Learning Objectives

About UHY

UHY is one of the nation's largest professional services firms providing audit, tax, consulting and advisory services to clients primarily in the dynamic middle market.

We are trailblazers who bring our experience from working within numerous industries to our clients so that we can provide them a 360-degree view of their businesses. Together with our clients, UHY works collaboratively to develop flexible, innovative solutions that meet our clients' business challenges.

As an independent member of UHY International, we are proud to be a part of a top 20 international network of independent accounting and consulting firms.

UHY Consulting is a management consulting firm that inspires clients to imagine and realize a company with unlimited potential, leaving lasting results that strengthen an organization and its people.

Affiliate of UHY LLP
A Top 30 national professional services firm with over 40 locations across the U.S.

A Founding Member of UHY International
Size and strength of a Top 20 Accounting and Consulting Network.

100+
COUNTRIES

340+
OFFICES

9,500+
PROFESSIONALS

Cary Grigg

Director

Digital Transformation

Background

- 20+ years of experience in project management, ERP implementations, and management consulting, with a strong emphasis on data governance, master data management, and resilient data structures that support enterprise-wide standardization and integrity.

Professional Experience

- Projects span ERP implementations, large-scale SQL data migrations, data governance strategy development, and supporting internal investigations with in-house counsel, strategic planning, and operational/IT audits, as well as Gemba Kaizen process optimization.

- Led a large multi-national organization in replacing their ERP and resolving 5 disparate, siloed data models with 10,000+ conflicts to unify the data structures. Additionally, led the functional design and data migration for UHY's replacement of their ERP system, which resulted in the ability to report and manage the business across geographies and product lines.

- Led Functional Design and Data Migration efforts for ERP system replacements and supported clients across financial services, retail, staffing, construction, and healthcare sectors, ensuring robust data frameworks that enhance operational efficiency and compliance.

Education & Certifications

- Miami University, Bachelor of Science, Management Information Systems

- Miami University, Bachelor of Arts, Psychology

- Certified Information Systems Auditor (CISA)

Background

- 25 years' experience in industry and consulting with a focus on technology, process optimization, and materials management

Professional Experience

- Developed predictive technology for forecasting margin improvement opportunities for Fortune 50 retail organization

- Developed a machine learning platform used to predict and identify fraud and risk exposure at a Fortune 200 retail organization

- Designed, developed, and implemented predictive modeling used in identifying supply chain risks

- Designed, developed, and implemented proprietary analytics software to identify manufacturing defects.

Education & Certifications

- Michigan State University, MS in Management, Strategy and Leadership

- Thunderbird School of Global Management, International Business

- Cal State Fullerton, BS in Business Administration

Cory McNeley

Managing Director

Digital Transformation

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Cory Teller

Principal Digital

Transformation

Background

- 15+ years of experience leading enterprise transformation initiatives. Recognized for blending strategic clarity with hands-on execution to drive adoption, align stakeholders, and deliver lasting operational improvements.

Professional Experience

- Project and Program Leadership: Led enterprise transformation programs across finance, operations, and IT, including ERP readiness, shared services design, and post-merger integration. Oversaw 18 workstreams for a $32B QSR IPO readiness initiative, driving functional alignment, executive reporting, and cross-functional coordination. Directed Legal Day One, Day 100, and data migration planning for a multinational bank merger, ensuring compliance, business continuity, and stakeholder coordination.

- Finance Process Optimization: Advised CFOs on modernizing finance operations, enhancing forecasting, working capital, and controls. Delivered improved cash flow visibility, reporting accuracy, and operational discipline across mid-market and enterprise clients.

- Operational Excellence: Specialized in operational transformation across finance and back-office functions, including process redesign, system implementation, automation, and change leadership. Delivered initiatives that enhanced scalability, reduced manual effort, and ensured smooth transitions through SOP development, workflow updates, and readiness planning.

- Business Process Documentation at Scale: Led documentation of 300+ processes for ERP go-live readiness and training. Oversaw full lifecycle documentation and optimization of key O2C workflows. Delivered current, interim, and future state flows, and built SOP libraries to support change adoption and post-cutover continuity.

Education & Certifications

- MBA, with distinction – Northwestern University, Kellogg School of Management

- B.S. in Business Administration, with honors – Truman State University

- Project Management Professional (PMP) – Project Management Institute

Objectives of Today's Session
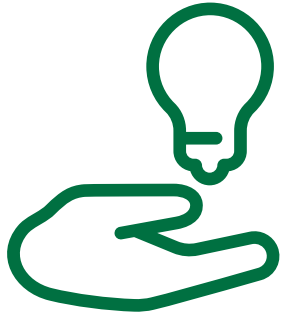
Grasp essential digital transformation concepts

Understand the fundamental principles and components of digital transformation
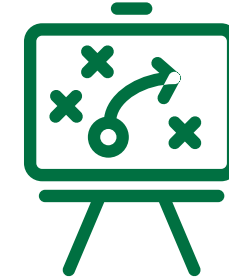
Identify strategic imperatives and success factors

Recognize the critical elements that enable successful digital transformation initiatives

Review practical, real-world case studies

Explore the measurable outcomes and lessons learned from digital transformation journeys

Learn actionable steps for implementation

Gain insights into the practical steps to implement digital transformation within your organization

Persistent Challenges Facing Businesses

- Legacy system inefficiencies
  Slow decision-making, limited scalability

- Manual processes
  Increased errors, resource constraints, higher costs

- Data fragmentation
  Inadequate business insights

- Talent acquisition and retention
  Challenges in finding and keeping a skilled workforce

- Rising customer expectations
  Competitive pressures to meet evolving demands

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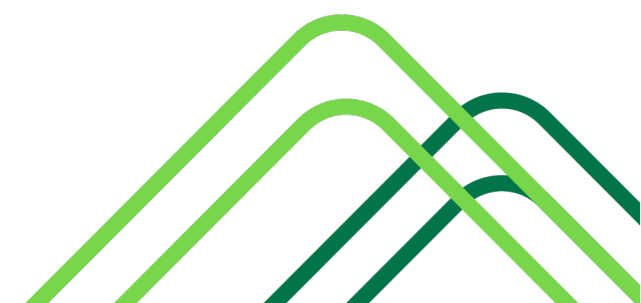
Unlocking Success Through Digital Transformation

Digital transformation aligns technology, people, processes, and strategy for agility, resilience, advantage, and growth, enabling organizations to address complexity and scalability.

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Why Digital Transformation?

Increasing complexity, scalability challenges, and customer expectations require businesses to adapt with agility

Achieve greater operational efficiency, faster decision-making, and enhanced customer experience

Gain and maintain a competitive edge and keep up with market demands

Improved agility, resilience, cost optimization, and sustainable growth for modern businesses

Digital transformation is no longer a choice, but a critical imperative for businesses of all sizes to remain competitive and adaptable in today's rapidly evolving landscape.

Strategic Imperatives for Digital Transformation
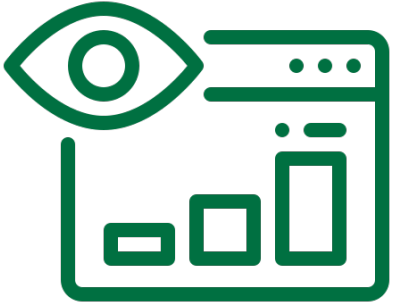
Integrated, real-time systems for end-to-end visibility

Enable seamless data flow and reporting across the organization for informed decision-making

Automated workflows and predictive analytics

Leverage AI and machine learning to streamline operations, identify trends, and optimize processes
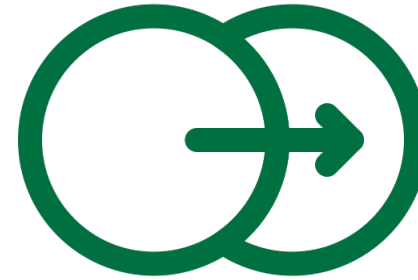
Effective change management for smooth transitions

Implement comprehensive communication strategies and training to drive sustainable adoption of new technologies

Additional considerations

Further considerations for successful digital transformation

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Critical Success Factors

Clear Current State Understanding

Create Objectives

Management Support/Buy-in

Build the House (5 Pillars)

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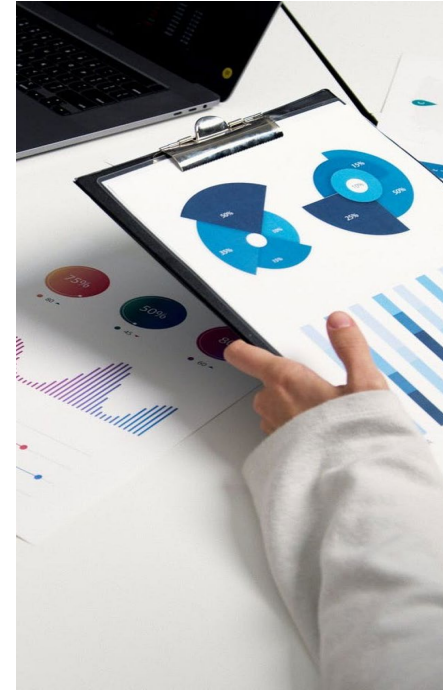# 5 Pillars of Digital Transformation

Modern ERP
Systems

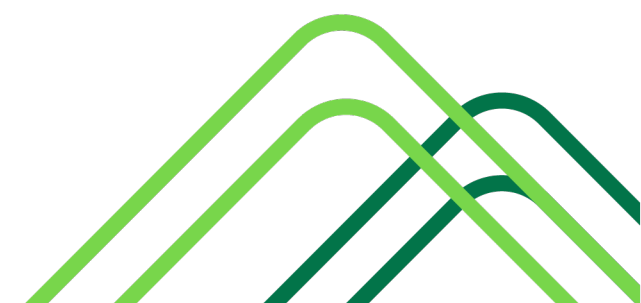Planning
& FP&A

Process
Automation

Data &
Analytics

Change Management &
Adoption

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Polling Question 1

Where does your organization currently see the greatest need or opportunity for support in its digital transformation journey?

A. Enhancing scalability and visibility through ERP improvements.
B. Enhancing forecast accuracy through planning alignment.
C. Automating repetitive operations to optimize performance.
D. Planning change and adoption to support transformation.
E. All the above

Core Pillar 1 – Modern ERP Systems

Cloud-native Platforms

Leverage cloud-native ERP systems for scalability and business growth.

Real-time Financial Visibility

Gain real-time financial visibility, operational agility, and enhanced collaboration.

Key Capabilities

Benefit from multi-entity consolidation, workflow automation, and mobile access.

Common ERP Systems

Explore leading ERP solutions for the mid-market, such as Acumatica, NetSuite, Deltek, and Microsoft Dynamics.

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Core Pillar 2 – Connected Planning & FP&A

Real-time, Dynamic Scenario Modeling and Forecasting

Leverage real-time data and advanced analytics to model various scenarios and forecast business performance with precision.

## Integrated Financial and Operational Planning

Align financial and operational plans to gain strategic insights and make informed, data-driven decisions.

## Automated Budgets, Approvals, and Reporting

Streamline budgeting, consolidation, and reporting processes through workflow automation, improving efficiency and accuracy.

Powerful FP&A and Connected Planning Tools

Utilize leading solutions like Prophix, Vena Solutions, Adaptive Insights, and Anaplan to enable agile, enterprise-wide planning and analysis.

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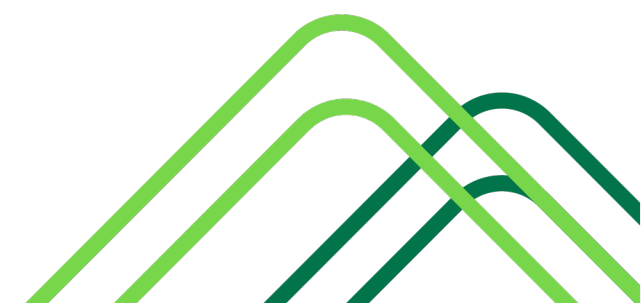
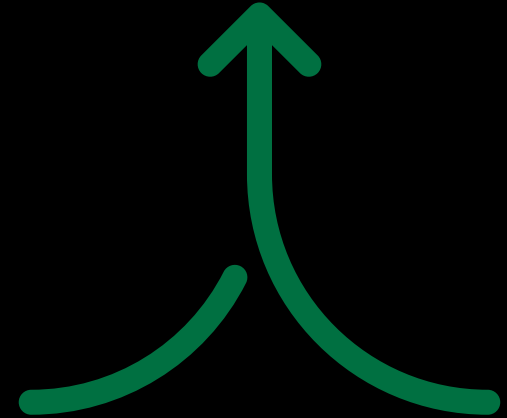# Core Pillar 3 – Process Automation
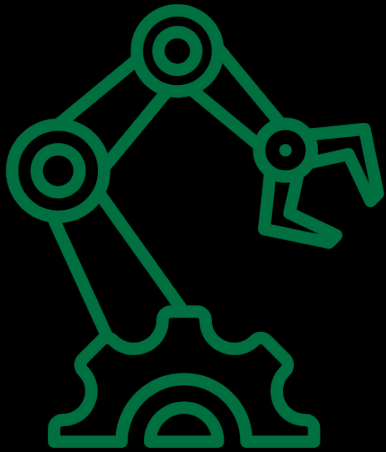
Automate manual, repetitive tasks

Utilize bots, RPA (Robotic Process Automation), and workflow tools to eliminate manual processing and reduce errors

Streamline transaction cycles

Significantly reduce processing time for invoices, payroll, expense reports, and other repetitive business transactions

Enhance operational efficiency

Automate time-consuming processes to free up resources and focus on strategic initiatives

Process automation is a key pillar of digital transformation, enabling mid-market businesses to enhance operational efficiency, reduce errors, and unlock resources for strategic growth.

Core Pillar 4 – Data & Analytics

Real-time dashboards

Providing actionable insights through visual analytics and KPI tracking
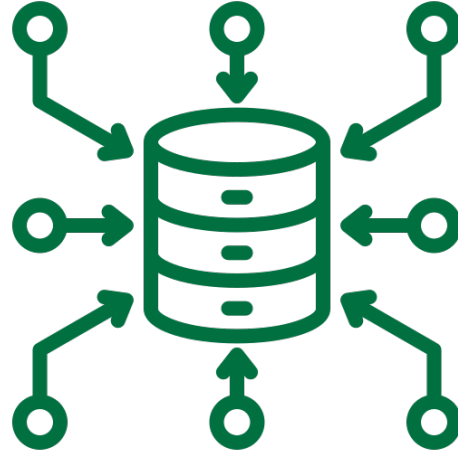
Unified data source

Establishing a single source of truth for accurate decision-making across the organization
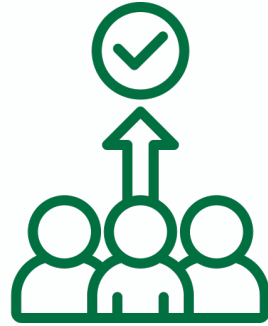
Enhanced operational visibility

Gaining comprehensive oversight of business performance and trends

Core Pillar 5 – Change Management & Adoption

Comprehensive communication strategies

Manage organizational change through effective communication plans and stakeholder engagement

Leadership alignment

Steer leadership towards a cohesive, aligned course of action

Sustainable adoption practices

Implement ongoing change management initiatives to drive continuous improvement and long-term transformation success

Training

Equips staff with essential competencies to navigate the organizational change

Successful digital transformation requires a comprehensive change management strategy to effectively navigate organizational and cultural shifts, enable employee adoption, and drive lasting impacts.

Polling Question 2

AI and machine learning were ranked most impactful by the UHY middle market survey. What is their impact on your industry?

1) Not at all
2) Somewhat impactful
3) Impactful
4) Very impactful

Leveraging Emerging Technologies
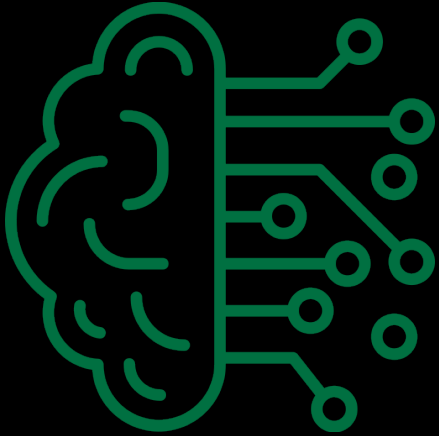
AI and Machine Learning Applications

Driving innovation and optimizing business processes through predictive analytics, automated insights, and customer behavior forecasting

Cloud Computing for Flexibility and Security

Leveraging cloud-based infrastructure for scalability, mobility, and improved data protection
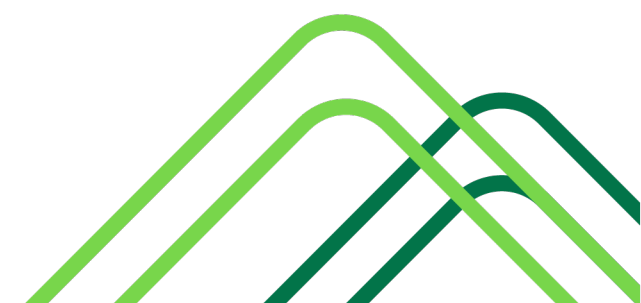
Real-world Use Cases

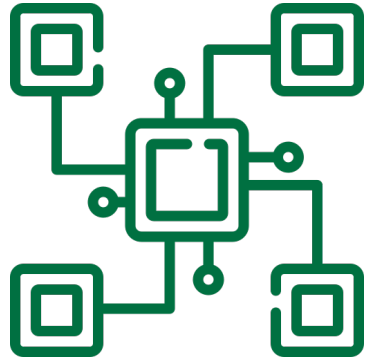Showcasing successful technology adoption and the measurable business impact

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AI & Machine Learning Practical Applications

Real-world business analytics capabilities. impacts and measurable ROIs can be achieved through the adoption of AI and Machine Learning technologies and advanced
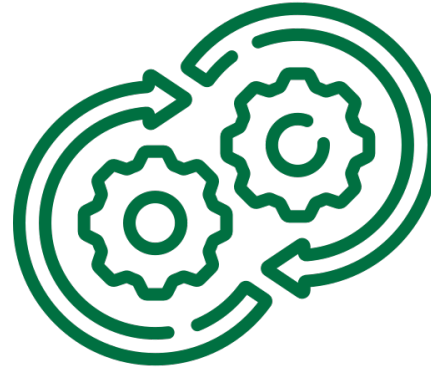
Integrating Technology Components

Explanation of integrated technology architecture

How AI, Machine Learning, data models, and infrastructure architecture fit together for optimal performance

Synergies between advanced analytics and automation

Leveraging the complementary capabilities of AI/ML and process automation for enhanced business impact

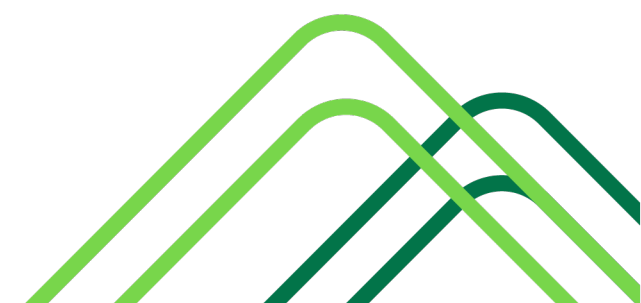### Strategic benefits of an integrated technology ecosystem

Improved decision-making, operational efficiency, and competitive advantage through a cohesive technology landscape

An integrated technology architecture is essential for realizing the full potential of digital transformation, combining advanced analytics, automation, and other emerging technologies to drive sustainable business growth.

Polling Question 3

Which of the following is a key benefit of incorporating data and analytics into your digital transformation strategy?

A. Business decisions rely solely on manual processes
B. Real-time visibility for smarter decision-making.
C. Minimizes the importance of operational visibility
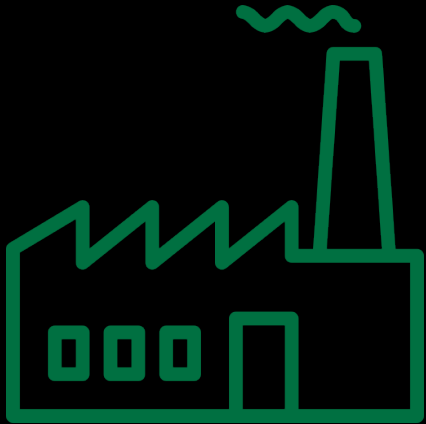D. Encourages to operation with disconnected data systems

Getting Started with Digital Transformation
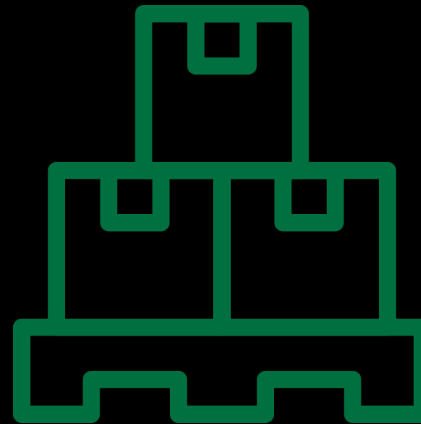
"**The secret to getting ahead is getting started**"

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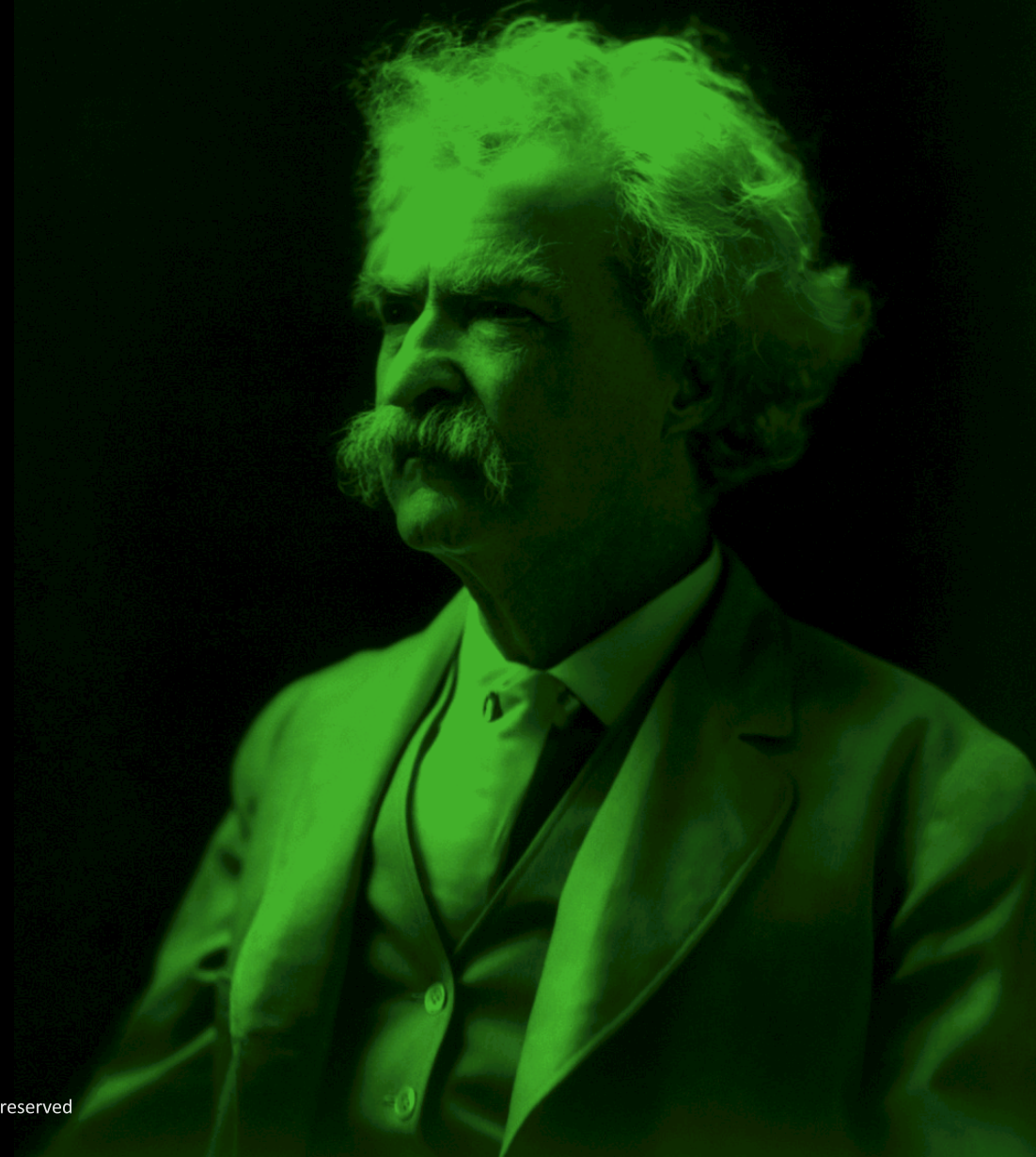
Industry-Specific Digital Transformation Examples

Distribution
Inventory optimization, profitability management

Manufacturing
Shop-floor automation, real-time labor tracking

Professional Services
Project accounting, resource management

Leveraging industry-specific digital solutions to drive operational efficiencies, enhance decision-making, and improve profitability across diverse business sectors.

Case Study: Public Pension Administration Organization

Digital Transformation

Goal: A $5B public pension administration organization was managing multiple funds with inefficient and antiquated technology, and processes and employee roles and responsibilities were unclear. UHY Consulting was engaged to identify opportunities for cost savings and synergies.

Solution: Conducted strategic interviews and detailed data analyses of current-state processes. Based off analysis, we recommended the client update their accounting, payroll, and enterprise resource planning applications, and then we identified and selected the appropriate software.

Result: Optimized the IT framework for $4.8M in annual savings and $16.6M in a one-time savings along with process optimization that saved 12,900 hours of non-value-added activities. Also, a new disability auditing cadence saved $1M in a single year.

UHY was later engaged for process improvement, automation, software selection, and outsourced services projects.

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Case Study: Software Evaluation & Selection

Digital Transformation

Goal: A private equity firm recently purchased a hardware creation assembly shop & a master key manufacturer. The private equity firm merged the two production efforts under one roof to improve efficiency and grow the potential customer base. As the two companies were on different & outdated ERP systems, UHY was engaged to evaluate the current state and run a technology selection effort with the goal of streamlining operations, merging systems, and automating processes.

Solution: UHY led a comprehensive process discovery for both sister companies, analyzing floor plans, manual workflows, and key pain points to determine whether issues stemmed from system limitations or process inefficiencies. They then developed process maps, documented requirements, and identified automation opportunities to align stakeholders on the RFP strategy. The RFP was distributed to six vendors, followed by a detailed quantitative analysis to narrow the selection to three finalists. Each finalist participated in a structured demo, evaluated using UHY's real-time grading tool, allowing key stakeholders to provide immediate feedback and make an informed, data-driven selection

Result: UHY was able to streamline the demo analysis process with its software selection methodology and tools to quickly determine Epicor as the client's software of choice. UHY used the rest of its remaining project budget to negotiate and scope the client's software needs, saving them nearly 30% from the initial cost estimate provided by the vendor.

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Ensuring Sustainable Transformation Success

Cultivate a culture of continuous improvement

Embrace an agile mindset, regularly review progress, and make incremental adjustments to stay ahead of the curve.

Implement adaptive strategies for long-term effectiveness

Develop flexible transformation plans that can evolve with changing business needs and emerging technologies.

Future-proof transformation initiatives

Continuously scan the landscape for new opportunities and challenges and proactively prepare your organization for what's ahead.

By cultivating a culture of continuous improvement, implementing adaptive strategies, and future-proofing your transformation initiatives, you can ensure the long-term success and sustainability of your digital transformation journey.

# Getting Started on Your Transformation Journey

Conducting digital readiness assessments

Evaluating current technology capabilities, processes, and organizational maturity to identify strengths and areas for improvement

Developing customized transformation roadmaps

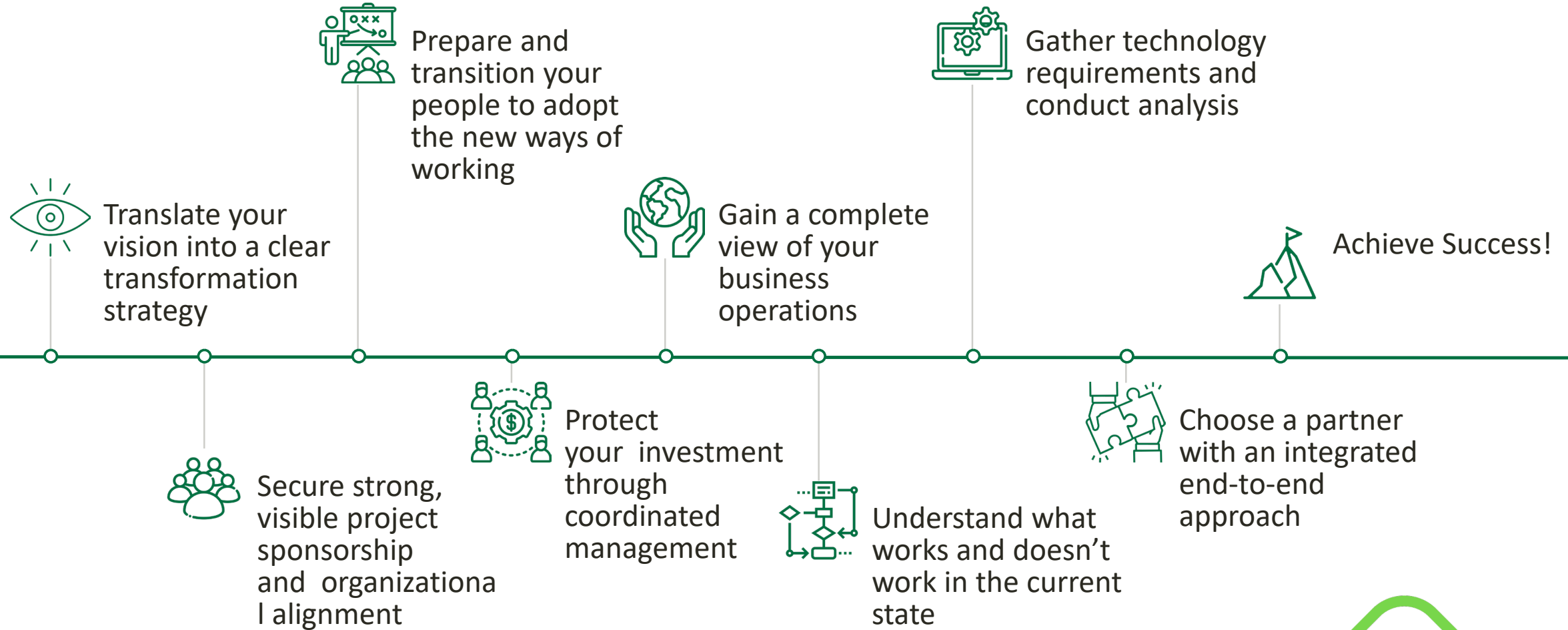Tailoring a comprehensive plan that aligns digital initiatives with business objectives and priorities
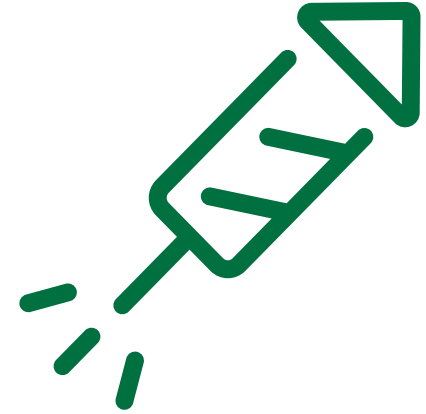
Prioritizing quick wins for immediate impact and buy-in

Identifying and implementing easily achievable projects that demonstrate the value of digital transformation to stakeholders

By taking a strategic and structured approach to digital transformation, organizations can build momentum, achieve quick wins, and lay the foundation for long-term, sustainable success.

UHY's Proven Methodology

Translate your vision into a clear transformation strategy

Prepare and transition your people to adopt the new ways of working

Secure strong, visible project sponsorship and organizational alignment

Protect your investment through coordinated management

Gain a complete view of your business operations

Understand what works and doesn't work in the current state

Gather technology requirements and conduct analysis

Choose a partner with an integrated end-to-end approach

Achieve Success!

Polling Question 4

How confident are you in your organization's current change management approach to support digital transformation?

A. Very confident
B. Somewhat confident
C. Not very confident
D. Unsure
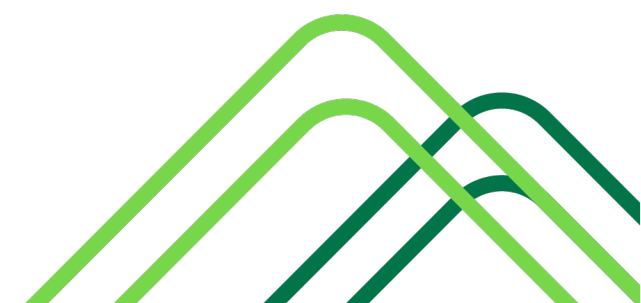
Recap and Critical Success Factors
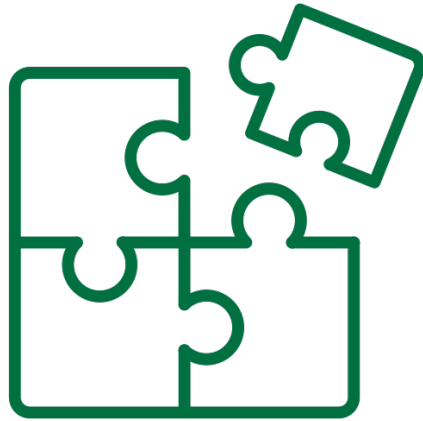
Essential elements of effective digital transformation

Aligning technology, people, processes, and business strategy for agility, resilience, and sustainable growth

Cultivating a culture of continuous innovation

Implementing adaptive strategies for long-term transformation effectiveness and future-proofing initiatives

Developing a culture of continuous improvement and adaptability helps ensure long-term, sustainable impact.

Next Steps and Invitation for Collaboration

Encourage internal discussions on transformation priorities

Facilitate discussions within your organization to identify key digital transformation initiatives and priorities.

Invitation to schedule personalized discovery sessions

Schedule a personalized discovery session with UHY Consulting to further explore your digital transformation journey.

Further resources and consultation available through UHY

Leverage UHY's expertise and resources to support your digital transformation efforts and achieve sustainable success.

Take the next step on your digital transformation journey by engaging with UHY Consulting for a personalized assessment and roadmap to unlock success.

Receiving CPE Credit

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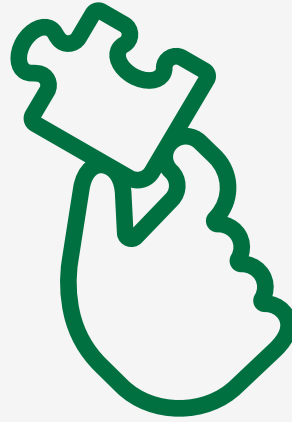 - External Colleagues: UHY's event page

Q&A Session

Questions

On practical implementation steps and best practices?

Challenges and concerns

Guidance and recommendations

Open discussion

Insights and feedback?

Your Digital Transformation journey should be well-supported and aligned with your unique business needs.

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