

Next-Gen Tech for the Rest of Us: Why AI, IoT, and Business Intelligence Is Not Just for **BIG BUSINESS**



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ARCHERPOINT
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Next-Gen Tech for the Rest of Us: Why AI, IoT, and Business Intelligence Is Not Just for Big Business

Connecting people, processes, and customers through digital highways has become a foundation for doing business—not just for big business, but for EVERY business. There is no longer any question that digital transformation is necessary for survival, but what does that mean for your small or mid-size organization's culture, processes, and operations? **How, specifically, can you take advantage of the next generation of technology?**

In this whitepaper, we'll help you understand the technologies that larger organizations use to serve customers better, control costs, support remote workforces and more. We'll provide examples of how companies could **use AI (Artificial Intelligence), IoT (Internet of Things) and other next-gen tech to level the playing field with larger competitors.** Since most of the applications that support these technologies are delivered through the cloud, you can achieve results quickly without overwhelming investments. Let's think big and build for the future.

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Engage through artificial intelligence

Today, every organization is collecting data from the many transactions, interactions and processes that support daily operations. That data can be harnessed, augmented and analyzed to help you better understand and engage with your customers. Many software applications include powerful artificial intelligence (AI) engines that interpret data in context, providing deeper insights than simple reporting can offer.

Accelerate the sales process

Your CRM software contains a historical record of how every lead has progressed through the sales process. Using AI, the software can predict the outcomes of new leads based on a multitude of factors and guide sales reps to focus efforts on the leads most likely to close.

Keep sales people focused

Using AI, your system can collect information about leads in process and build an activity plan for your sales team. By collecting data from historic records as well as outside sources—like LinkedIn—your CRM system can gather background automatically and recommend next steps.

Empower service agents

Service agents can manage cases faster and provide more personalized service with relevant information, resources and complete customer context delivered to them through AI. Your CRM system can proactively deliver history, product information, and recommendations to your agents so they can resolve common issues quickly and provide service experiences your customers will rave about.

Personalized experiences

An online sports equipment retailer uses a chatbot to identify the interests of website visitors and match sales agents with specialized knowledge. While the agent is chatting, product suggestions are surfaced to help guide the conversation.



Be proactive with IoT

The IoT (Internet of Things) is the network of machines, devices, and equipment embedded with sensors to collect and transmit data on activity and performance. Using various software applications, organizations use IoT data to diagnose, schedule, maintain, and manage assets.

Maintain equipment

Through IoT, you can monitor machines and equipment to take a proactive approach to maintenance and troubleshooting. Using IoT sensor data, your ERP system can use predictive service models to schedule maintenance based on usage or time.

Fix problems proactively

Sensor data tracked in ERP can send alerts when there is a potential problem in equipment, allowing you to reduce machine downtime with early intervention. If service people must go on site to fix equipment, IoT can provide information on which parts and tools the technician will need to resolve the issue.

Control remote environments

Companies such as property owners, manufacturers, and distributors that have to maintain light, temperature and other environmental factors in remote locations can use IoT to maintain consistency. From ensuring areas are properly lighted for safety to keeping machinery at an optimum temperature, IoT data can be monitored through ERP systems that send alerts when there is a problem.



Remote service

An oil well service company uses IoT to monitor well equipment across large areas. Equipment is monitored 24x7 with alerts sent to repair teams when there is a problem. In some cases technicians can make adjustments to equipment remotely to fix the issues. When technicians do have to go to the location, they have a better understanding of the parts and tools they will need.

Understand through data analytics

With the abundance of data collected by organizations today, it's easy to "not see the forest for the trees." To take control and parse out useful information, your organization needs to connect systems, like CRM and accounting, through the cloud in order to centralize data. With data combined from across the organization, you can develop and monitor key metrics to predict customer behaviors, measure employee performance, reduce operational costs, and much more.

Anticipate customer preferences

Analysis of historical and trending buying patterns and preferences can provide valuable insights into customer behavior. Through data analytics, you can predict which products customers are more likely to buy next based on previous purchases. These insights allow you to improve marketing effectiveness through education and promotions.

Deliver products proactively

You can use data to understand customer interests and design products and services to fill emerging markets. By combining data from both internal and external sources, like social sites, you can get more insight into the challenges your customers face and create innovative products or services to solve them.

Uncover hidden potential

Through data analytics, your organization can identify sales trends across product groups, service lines, and locations. With better forecasts, you can match inventory levels to meet local demand, assign technicians where their skills are most needed, or launch promotions to clear out products on the decline.

Forecasting for profits

A coffee store chain links drive-thru sales forecasts with upcoming weather forecasts to adjust inventory and staffing. On rainy days drive-thru volume will be much higher because people don't want to leave their car.

Modernize with intelligent operations

With unified systems and data, your organizations can make better-informed, intelligent decisions. Instead of reacting to challenges, you can look ahead to predict outcomes and take corrective action. Intelligent operations apply data analytics, machine learning, and AI to deliver complete information—with context and relevance—to the people who need it.

Optimize operations

Distributors and manufacturers depend on balancing many resources and processes to schedule their output. Spreadsheets and “gut feelings” can’t handle the complex matrix of known factors, let alone the unexpected ones—like delayed parts or equipment breakdown. Through intelligent operations, your connected systems can collect and analyze all the elements needed to reschedule and determine the best way forward.

Give managers relevant data

When managers have a holistic view of relevant data that connects their business unit’s systems, they can make better-informed decisions. With unified data, delivered through dashboards, managers can optimize operations, empower their teams and better serve customers. Custom-tailored dashboards incorporate analytic insights to help managers see behind the numbers.

Track orders from end-to-end

With timely, accurate data shared across functions, your organization can monitor and report on the status of orders—and all the resources needed to complete them—at every step of the way. From inventory status to production scheduling to shipping details, connected data and processes can support intelligent order management.



Connected supply chain

A consumer goods distributor builds forecasts from sales pipelines, using machine learning algorithms to adjust for past closing history. Forecasts are automatically shared with trusted vendors to adjust production and match inventory purchases with expected demand.

Automate through workflows

Modern, connected software is designed to support consistent business processes and reduce the need for manual input whenever possible. Automated workflows use standardized rules to guide processes—like expense reimbursements, work orders and accounts payable—through the necessary stages. Workflows validate data, gather approvals, trigger alerts, and much more to reduce administration overhead, ensure consistency and benchmark performance.

Streamline approval processes

Automate approval processes for workflows like accounts payable—or any other routine process. Through predefined rules, your system will validate invoices against purchase orders, flag any discrepancies, and send emails for approvals from appropriate personnel. If approvals are not returned when due, the workflow will send reminders and alerts.



Improve internal controls

Through automated internal controls, you can ensure consistent management of transactions—like validating invoices against customer pricing guidelines. Automated processes driven by CRM or ERP software can eliminate manual data entry, reduce the number of spreadsheets, and protect against fraud.

Deliver consistent customer experiences

Automated workflows allow you to apply rules to sales and customer service experiences to ensure consistent results. For example, the system can automatically generate a follow-up call whenever a customer is sent a quote. Or you could apply a workflow rule to alert a customer service supervisor if a work order is not completed within the expected time.

Accelerated cash flow

The technicians for an HVAC service company use tablets to collect customer signatures when they complete a job. The completed work order is submitted before they leave the premises, triggering a billing workflow which automatically computes time and materials, then sends out the customer invoice and follows up with a satisfaction survey.

Experience with virtual reality

Virtual reality uses 3D images and visual hardware to display a virtual world to the end-user. By combining virtual reality with business data (often referred to as mixed reality), your organization can add visual components to a wide range of situations. Technical support, training, product visualization, models, and layouts are just a few of the opportunities emerging through enhanced visualization.

Connect to experts

You don't need to have an expert in the room to fix equipment when you can share a real-time view of the problem. By sharing the view of equipment through a hands-free device like Microsoft HoloLens, the expert can see what the technician on-site sees and walk them through the corrective measures.

Improve training

Enhance learning with step-by-step instructions that show employees how to use tools and parts in real work situations. Using holographic step-by-step instructions, you can guide employees through procedures to help them learn and apply their training immediately. When oversight is needed, trainers can connect to see what the student has done.

Help customers visualize products

Through virtual reality, salespeople can show products to customers in their real-world environment. Whether it's a sofa in their living room or a machine on the production floor, you can help customers see exactly how the product will perform in their setting. Visualizations can also be used to validate designs before production begins to identify issues and find areas for improvement.



Remote support

A medical equipment manufacturer ships a Microsoft HoloLens with every machine to enable faster training. Working remotely, the manufacturer's technicians can train their customer's operators and provide ongoing support "as if they were there."

Empower employees with information

To keep up with the expectations of a tech-savvy workforce, you need to adopt modern systems that support and connect your employees. Day-to-day tasks like scheduling, expenses, PTO, and benefits should be easy to access and manage online. Recruiting and onboarding should use the latest technology and tools to impress the people you want to attract.

Streamline employee experiences

Use self-service portals to allow employees to track time, PTO, training, and certifications no matter where they are working. Use automated workflows to help remote employees stay connected and productive. Support collaboration through internal document and conferencing applications.



Support a culture of inclusion

Your human resource systems should connect information across departments to support a culture of collaboration, inclusivity, and transparency. Provide visibility into open positions and career paths for all employees. Ensure leave and absence policies, including flexible working and leave carry-forward rules, are applied equally and consistently across departments.

Optimize your teams

Use interactive analytics to identify employee skill gaps and address them by creating learning courses. Offer courses through an interactive, collaborative learning portal to build a sense of community around learning. Facilitate collaborative performance reviews to ensure employees get feedback to support their progress.

Simplified time sheets

A software development company simplifies employee time entry with AI assisted time sheets. Time entries are pre-populated with project codes based on activities gathered from the calendar, emails and other apps to improve accuracy and reduce manual entry. Employees can adjust entries easily and submit.

Human-Led Services in a Tech Driven World

Technology should make your life easier, not more complex. ArcherPoint's team of experts, from consultants and functional analysts to developers and support technicians, look at your whole business to understand your challenges, goals, and needs.

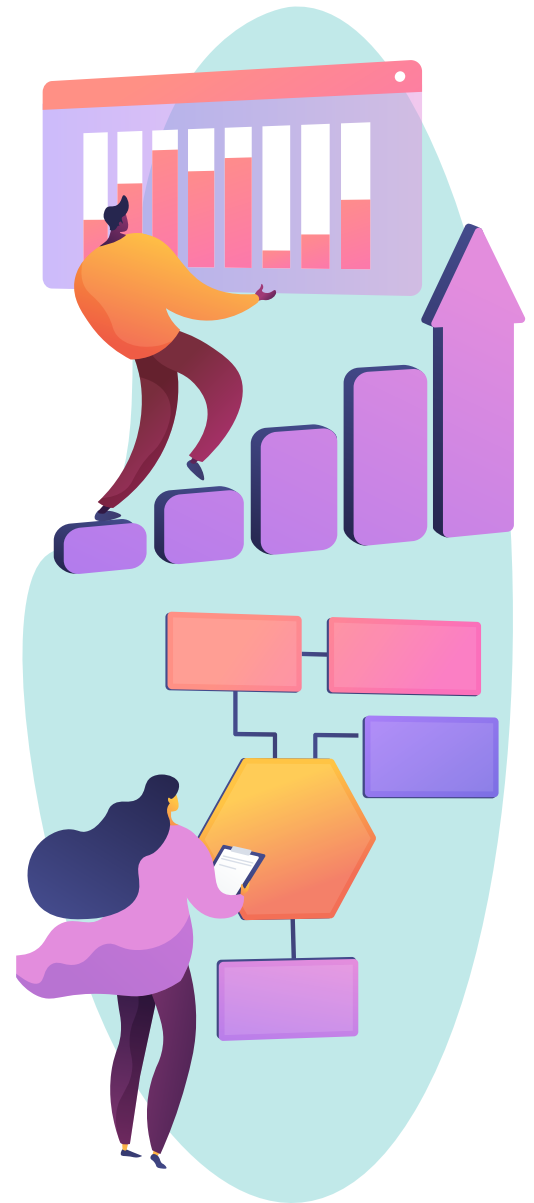
We approach every project as unique, because it is. And we propose solutions that make life easier so that you can make smarter decisions and drive your business forward.

Work with ArcherPoint by Cherry Bekaert

For nearly 20 years, we've transformed companies with complex ERP and IT needs through expert business analysis, functional consulting, and personal service.

Schedule a [free discovery call](#) with our team to discuss your business needs.

Let us help you build a better business today.



ArcherPoint by Cherry Bekaert—A Microsoft Partner

Founded in 2002, ArcherPoint by Cherry Bekaert is a global Microsoft Dynamics ERP Solutions Partner, delivering modern workplace solutions including Microsoft Dynamics 365 Business Central, Dynamics NAV, Azure, Microsoft 365, and Power Platform across the US, Canada, Mexico, and Europe. Now backed by Cherry Bekaert, a leading CPA and advisory firm, ArcherPoint expands its capabilities beyond ERP to include strategic tax, audit, and advisory expertise. Our certified professionals design, implement, and support solutions for industries such as manufacturing, distribution, retail, logistics, and more—helping clients realize business value through comprehensive ERP, cloud, and advisory services that evolve with their needs.

Industries Served	Product Offerings	Focus Areas
Manufacturing	Dynamics 365 Business Central	ERP
Distribution	Microsoft Dynamics NAV	Supply Chain Operations
Retail/Hospitality	Microsoft Dynamics Sales	Inventory & Warehouse Mgmt.
Equipment Rental	Microsoft Azure	Manufacturing
Food & Beverage	Microsoft 365	Retail
Professional	Power Apps & Power BI LS	eCommerce
Services	Retail	Cloud & IT
		BI & Reporting

Service Offerings

ArcherPoint provides full-service, customer-centric implementation methodology for every engagement. Our highly skilled consultants and professionals deliver high-touch experiences, whether performing business or functional analyses, accounting for current or future needs, or alongside or outside new ERP implementations. Hear what [our customers](#) have to say.

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