

AI AND AUTOMATION



Girish
CEO



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ERC Australia

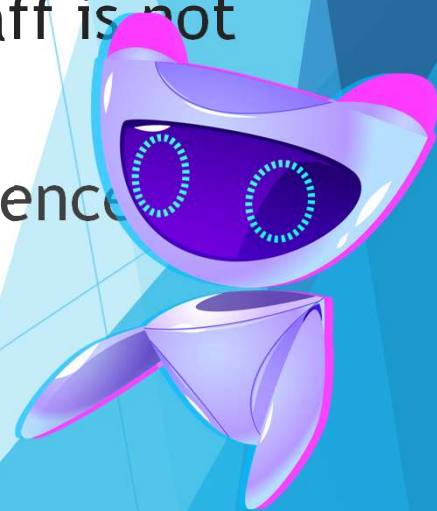
Datsenz Journey

- ▶ Our noble mission: *“To bring joy to every individual and to support individuals with special needs in achieving greater independence.”*
- ▶ Datsenz, we recognize that while data itself is not power, the application of data insights is. Our name, *Datsenz*, embodies our commitment to **“Bringing Sense to the Data.”**
- ▶ Our core value is to focus on addressing business challenges and delivering optimal outcomes and benefits.
- ▶ Our value chain process covers Data, AI, Integration & Sustainability.



BUSINESS CHALLENGES

- ▶ Are you constantly busy, with not enough time in the day to do everything?
- ▶ Do you feel that you do not have enough resources within the business to manage all the work??
- ▶ Are you wondering how you can improve business profitability without working harder, especially when finding good staff is not cheap (If you can find them)?
- ▶ Do you want to give your clients a great customer experience?



IS AI AN ANSWER?

- ▶ What is AI?
- ▶ Is there any substance or it's all a hype?
- ▶ Can I ride the AI wave?
 - ▶ Or risk being left behind?
- ▶ What can AI do for my business?
- ▶ What are the risks?
- ▶ Case studies
- ▶ Where/How do I start?



SETTING THE SCENE

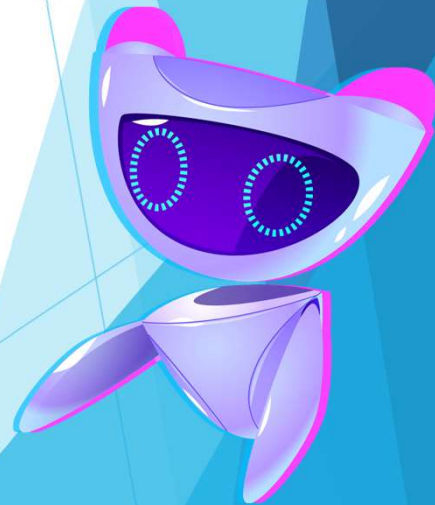
- ▶ What is AI ?

Ability of computer systems to mimic the problem-solving and decision-making capabilities of the human mind

- ▶ Substance or Hype ?

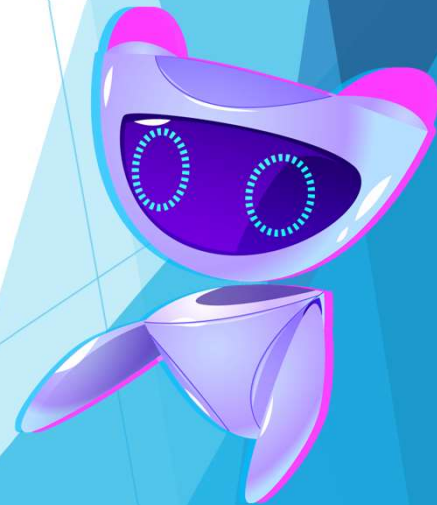
- ▶ Generative AI

- ▶ Summarization
- ▶ Content generation
- ▶ Retrieval-augmented generation
- ▶ Insight extraction
- ▶ Classification



Benefits and risks?

- ▶ What can AI do for my business? Which areas can it most help?
 - Client service and engagement
 - Marketing
 - Compliance
 - Portfolio Optimization
- ▶ Risks
 - ▶ Security of client data
 - ▶ Where is the AI engine hosted?
 - ▶ Hallucinations
 - ▶ Where is the data coming from?
 - ▶ Wider internet?
 - ▶ Enterprise data



**A Financial
Advice firm in
North Sydney**

Case Study

Industry: Financial
Advice

Geography : *North
Sydney*

Business Requirements

- **Class D client's re-engagement, Marketing outreach**
- **Email marketing**
- **Pre-qualify before involving FAs**

Business Challenge

- **Minimize the time spent by Advisors on potential clients in early stages of engagement**
- **Minimize the time spent by Advisors on not interested and non-qualified clients**
- **Automate the reach out campaign and fact collection**



Solution components

- **MS Dynamics 365 and Power Automate**
- **IBM watsonx Virtual Assistant**



A Leading University in western Sydney

Case Study

Industry: Higher education

Geography :
Western Sydney

Business Requirements

- **Scholarship Administration automation**

Business Challenges

- **Source information from multiple back-end systems**
- **Intense manual and repetitive work**
- **Team members overloaded with work and not able to keep up with the tasks**

Solution components

- **IBM watsonx Orchestrate and RPA**

Outcome

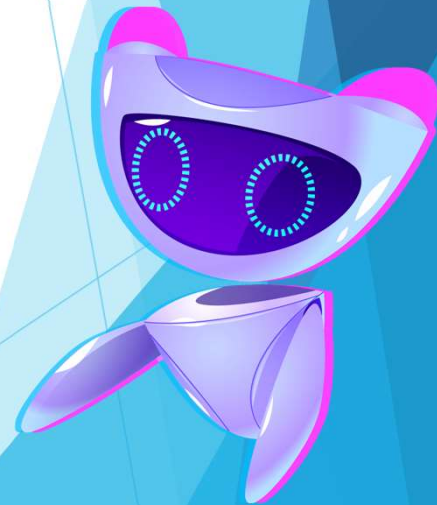
Process	# of Students	Current Run Time (min)	WatsonX Run Time (mins)	Potential Days Saved
SST	11,000	9,900	40	22.00
Argos	11,000	1,540	20	3.50

Scholarship Admin Pilot demo



Where/How do I start?

- ▶ Discuss with your technology partner and short list the use cases
- ▶ Identify a few use cases for AI and Automation
 - ▶ Any process that's taking too much of manual time and effort
 - ▶ Is cause of frustration and stress
- ▶ Pick couple of use cases that are
 - ▶ Low hanging fruits
 - ▶ Not too big an effort to implement
 - ▶ But impactful at the same time
- ▶ Do a pilot first before launching into full project
 - ▶ Gives you the chance to test the water before diving in



NEXT STEP!

JOIN OUR AI AND AUTOMATION USER GROUP &
ASK FOR OUR FREE CONSULTATION OFFER

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Thank You

