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CAPRAE CAPITAL

CORPORATE RESTRUCTURING

**AI Readiness
As A Service**



Corporate Restructuring - AIRaaS:

A Strategy for Improving Organizational Performance

ABSTRACT:

This paper outlines is supplementary to the comprehensive restructuring strategy, and is aimed at investigating the potential implementations and impacts that can be realized with AI tools. Moreover, this analysis presents a comprehensive technology stack optimization strategy to enhance organizational performance during a corporate restructuring. By integrating AI-driven automation tools across litigation, business management, tax, and administrative functions, the proposed improvements promise substantial operational efficiencies. Specific recommendations include automating repetitive tasks, leveraging AI for advanced document and workflow management, and restructuring redundant roles. The anticipated measurable outcomes are substantial cost savings, significant time reductions, enhanced scalability, and improved operational agility, positioning the organization competitively within its industry.

Keywords

AI, Corporate, Environment, Organizational, Performance, Restructuring, Strateg



1. High Level Takeaways

- Clear, high-friction workflows identified across Tax, Litigation, Admin, and Business Management are ideal candidates for AI-driven automation, particularly document handling, billing, and communication. Automation opportunities provide clear paths to reduce workload by 40-100% across various roles.
- Automation of targeted roles could unlock \$220,000 to \$343,000 in annual payroll savings, with an additional \$330,000+ in reclaimed productivity redirected to revenue-generating activities.
- A three-phase roadmap balances early quick wins (e.g., document automation pilots) with organization-wide scaling and tool consolidation over 16 weeks.
- Solutions focus on unifying fragmented systems, reducing tool duplication (e.g., Dropbox vs. SharePoint), and upskilling staff to sustainably scale AI use across departments.

2. Technology Readiness Evaluation Scorecard

Based on our comprehensive analysis and discussions, the following scores reflect the current AI readiness of the organization:

- **Strategic Alignment – 9/10**
 - Teams consistently expressed a desire to automate high-effort, low-value tasks. For example, leadership emphasized the need to cut time spent on document management and follow-ups across litigation and tax, making it clear that AI is viewed as an enabler of productivity, not a novelty.
- **Data Quality & Preparedness – 4/10**
 - Manual processes like invoice preparation, unstructured Excel usage, and inconsistent client intake tools (e.g., Monday.com vs. Google Forms) were common. These fragmented systems inhibit clean data flow and suggest substantial investment is needed in structured data and validation mechanisms.
- **Infrastructure & Tools – 4/10**
 - While the organization uses powerful tools (Lacerte, SharePoint, Monday.com), usage is not uniform. Overlapping platforms (Dropbox, SharePoint, Laserfiche) complicate workflows. Most employees still rely on manual emails, desktop-based documents, and inconsistent tracking methods.
- **Organizational Capacity – 6/10**
 - Feedback from across departments showed a willingness to adopt new technologies—especially if they reduce admin time and enable better collaboration. However, training gaps, reliance on manual billing, and underutilized dashboards (e.g., by Declan R) show that capability building is essential for scalable AI integration.



3. AI Driven Technology Recommendations

Litigation Team

- **Data Entry Automation:** Reduce manual tasks by 40-60%, saving \$6,000 annually per role.
 - **Document Drafting AI:** Save 6 hours per week per employee, annual savings of \$6,000 per employee.
 - **Document Management:** Achieve up to 85% reduction in time spent on file organization.
 - **Billing & Time Tracking:** Automate to save 2.5 hours weekly per employee.
 - **Client Communications:** Save 5 hours weekly per employee.
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Business Management

- **Workflow Automation:** Achieve complete automation, saving \$40,000 per year per role.
 - **Marketing & Content Automation:** Increase engagement by 40%, saving 3-5 hours per week per marketer, with campaign creation speed increased by 93%.
 - **Document Generation Automation:** Save 30 hours per month, equating to 4% of total team time.
 - **Client Scheduling Automation:** Complete elimination of manual scheduling workload.
 - **IT Support Automation:** Reduce support costs by 90%.
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Tax Team

- **OCR & AI-driven Data Entry:** Reduce manual data entry by 70%.
 - **Client Follow-up Automation:** Reduce client communication workload by 40%.
 - **AI-powered QA for Tax Returns:** Substantial reduction in manual errors and review time.
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Administrative Team

- **Automated Reconciliation:** Reduce workload by 40%.
 - **Email Sorting & Filing Automation:** Target 90% accuracy in email management.
 - **Mail Processing Automation:** Significant reduction in manual mail handling.
 - **Smart Payment Scheduling:** Substantial reduction in manual tracking and increased accuracy.
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4. Estimated Impact of AI on Organization

Based on actual operating figures shared during our engagement, the client reports annual revenue of approximately \$7 million. SG&A allocation is approximately 35%, equating to \$2.45 million in annual overhead across litigation, tax, admin, and business operations.

- **Operational Efficiency Gains:** Deloitte benchmarks suggest that AI integration can reduce SG&A costs by up to 15% for high-automation sectors. This is roughly aligned with our findings after a comprehensive review. Applying a conservative 11%:
 - Payroll accounts for roughly 60% of SG&A (\$1.47M/year)
 - Cost of time-intensive, automatable roles (document control, tax prep, billing, communication): ~\$980,000/year
 - Estimated savings from AI-driven optimization:
 - Direct roles (20–30% time reduction): ~\$196,000–\$294,000/year
 - Indirect/tangential roles (5–10% gain): ~\$24,000–\$49,000/year
 - **Total Estimated Annual Savings:** \$220,000 to \$343,000
- **Time Reallocation Benefits:**
 - Based on the reorganization documents, staff spend an estimated 15–20% of their time on repetitive tasks (e.g., printing, uploading, cross-checking, emailing, scheduling)
 - With a team of 40 individuals and a conservative 16% time gain: ~3,300 hours/year reclaimed
 - This time can now be reallocated to billable services, client acquisition, or strategic initiatives. Based on historical utilization rates documented in the reorganization proposal, even a modest 10% reinvestment of these recovered hours into billable activities at an average rate of \$100/hour could generate approximately \$330,000 in additional annual revenue.



5. Suggested Tech Stack

More comprehensive tech stack and implementation timeline is located within the appendix.

Category	Current Usage	Proposed Tool(s)	Justification
Workflow Automation	Monday.com, Email, Manual Tracking	Microsoft Power Automate, Zapier, Python Scripting	Enables conditional logic, multi-platform automation, and eliminates need for duplicate data entry noted in document control and litigation workflows.
Document Management	SharePoint, Laserfiche, Dropbox	Litera, NetDocuments AI	Current fragmentation creates inefficiencies; unified AI-backed systems streamline intake, version control, and compliance tracking.
Billing & Timekeeping	Manual Excel entries, Bill4Time	Laurel.ai, Bill4Time (enhanced use)	Manual invoice prep across admin and litigation depts wastes 2-4 hrs/week per role; AI-enabled timekeeping reduces backlogs.
Client Communications	Outlook, Manual Follow-ups	Microsoft Copilot, Clara AI	Enables context-aware drafting and scheduling for client intake, reminders, and follow-ups - areas flagged as bottlenecks by Connie D and Jonny A.
Tax Data Entry	Lacerte, SharePoint	SurePrep, AutoEntry	Recommended by Bill G for consistent automation of 1040 workflows; replaces low-value data entry (Jacinta A).
Scheduling	Email Chains, Phone Tag	Clara AI, x.ai	Reduces internal back-and-forth; streamlines calendar blocking noted across admin and client-facing roles.
Content/Marketing	WordPress, Manual Email Campaigns	Jasper AI, Copy.ai	Jose M's workload overload can be alleviated by campaign automation, preserving his strategic focus.



Document Generation	Practice CS, SharePrep, Word	Formstack Documents, DocuSign	Automates creation of engagement letters, tax summaries, and recurring reports based on structured input.
IT Support	Manual Admin Tasks by Declan R	Aisera, Azure Copilot	Offloads routine support (e.g., onboarding/offboarding, password resets) to AI, allowing Declan to focus on automation and integration.

This modernized tech stack addresses redundancies uncovered in the reorganization proposal and realigns the workload around higher-leverage tasks. It eliminates fragmented tool usage (e.g., ShareFile vs. SharePoint), reduces context-switching, and ensures role clarity. Where applicable, licensing costs are modest relative to savings (\$15–\$99/month per user in most cases), and many tools integrate directly with Microsoft 365, already widely deployed across the organization.

6. Implementation Roadmap

Phase 1: Assessment & Pilot (Weeks 1–4)

- Conduct technology audits and identify champions.
 - Pilot key AI tools in targeted roles for baseline metric establishment.
 - Provide initial training and support materials for selected pilot teams.
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Phase 2: Deployment & Training (Weeks 5–12)

- Deploy selected AI technologies company-wide.
 - Conduct comprehensive staff training workshops and provide continuous support.
 - Integrate new workflows into existing operational frameworks.
 - Regularly review progress and adjust workflows accordingly.
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Phase 3: Optimization & Consolidation (Weeks 13–16)

- Monitor KPIs closely and refine processes based on performance data.
 - Consolidate gains and adjust team roles based on AI integration outcomes.
 - Implement feedback loops for ongoing optimization.
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7. Risks and Mitigation Strategies

Risk	Description (Context-Specific)	Mitigation Strategy
Shadow IT & Tool Fragmentation	Teams currently use a patchwork of tools (e.g., SharePoint, Dropbox, Laserfiche), often duplicating functionality, creating sync issues and compliance gaps.	Conduct a full consolidation audit. Restrict access to unapproved tools. Transition to a unified data/document architecture supported by Power Automate + SharePoint.
Inconsistent Platform Adoption	Tools like Monday.com are inconsistently used across roles. Jacinta A and Connie D noted manual task tracking despite available platforms.	Create mandatory training modules and SOPs for each critical platform. Assign department champions (e.g., Bill G for Monday.com) to drive accountability.
Data Integrity & Hallucination Risk in AI Outputs	Due to inconsistent recordkeeping and reliance on manual scraping, AI-driven outputs may propagate bad data (as flagged by Declan R and Jose M's concerns).	Introduce data validation pipelines. Establish a data governance committee responsible for source-of-truth management. Implement record versioning controls.
Low Automation Familiarity in Admin Teams	Administrative personnel (e.g., Joanne C, Ariel H, and Ken P) were noted to rely on task lists and email rather than structured platforms.	Initiate a tiered automation onboarding process with interactive use cases tailored to roles. Use Power Automate Desktop to bridge digital literacy gaps.
Security Vulnerabilities in Document Sharing	Multiple platforms and unclear access permissions risk exposing sensitive documents (e.g., tax records, litigation reports).	Enforce role-based access control (RBAC) and integrate Microsoft Defender across SharePoint, Outlook, and OneDrive. Eliminate external Dropbox/Google Drive usage.
Overdependence on Individual Contributors	Tech adoption and knowledge (e.g., Zapier, SQL, onboarding flows) are concentrated in individuals like Declan R or Jose M.	Document all workflows in Confluence or Notion. Establish knowledge transfer plans and ensure 2-person redundancy on all technical systems.



Change Fatigue from Tool Overload	Employees like Sophie Y and Dylan G have shifted departments or workflows frequently and may resist additional systemic change.	Align tool rollout with reorganization phases. Combine training with early small wins and individualized coaching to maintain morale.
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Proactively addressing these organization-specific risks will reduce rollout friction, enhance adoption, and safeguard against systemic regressions in the AI transformation journey.

8. Conclusion

By deploying a modernized, AI-enabled tech stack and following the structured roadmap presented, the organization can conservatively save over \$500,000 annually through payroll efficiency and reclaimed billable hours - while laying the groundwork for scalable, secure growth.

Adoption of these systems will not only improve team morale by focusing their time on more rewarding tasks, but also position the business to compete more effectively, serve clients with greater consistency, and eliminate operational friction that slows execution. The building blocks are in place. What's needed now is deliberate rollout, sustained training, and continuous improvement to embed automation into the organizational DNA.



Appendix

Litigation Team

Role/Task Area	AI Tool	Use Case	Expected Efficiency Gain	Cost Savings / ROI Estimate
Data Entry (Dylan G)	Microsoft Power Automate + GPT for Excel	Automate CPBS report updates, balance sheet entries, billing inputs	40-60% reduction in time spent on manual data entry ¹	Assume \$40k/year salary. 30% time * 50% * 40k = 6k/year saving for Dylan G
Document Drafting (Helly R, Mark S)	Harvey AI or Lexis+ AI Drafting	Draft financial and legal reports including summaries for assets/income	6 hours saved per week ²	Assume \$40k/year salary, 40 hour work week, 40k*6/40 = 6k/year saving for Mark S alone
Document Management (Helly R)	Litera or NetDocuments AI Search	Intelligent file organization, deduplication, version control	Up to 85% time saved ³	Helly R spends 70% of time on report preparation, 85% saved in a 40 hour work week = 23.8 hours saved
Billing & Time Tracking (Dylan G)	Laurel or Bill4Time with AI	Auto-populate time entries based on email/calendar integrations	Saves about half an hour a day ⁴	An additional half an hour a day = 2.5 hours in a 5 day work week for Dylan G
Client Communication Triage (Mark S, Dylan G, Helly R)	Microsoft Copilot	Auto-draft client updates, summary emails, and invoice reminders	5 hour per week cost saving per employee for client comms ⁵	Assuming 40 hr work week for all employees, 15/hr cost saving per week for the team

¹https://www.microsoft.com/en-au/power-platform/products/power-automate#:~:text=Enhance%20productivity%20with%20automation%20*%20248%%20ROI,reduction%20in%20developer%20time%20on%20automated%20workflows1

²<https://www.harvey.ai/blog/harvey-internal>

³<https://info.litera.com/rs/046-QLX-552/images/Litera-Create-Data-Sheet.pdf?v=20220815>

⁴<https://www.lawnext.com/2025/02/nine-years-after-its-automated-timekeeping-platform-won-the-first-start-up-alley-laurel-offers-startups-a-vision-of-what-is-possible.html>

⁵<https://blogs.microsoft.com/blog/2024/10/29/how-copilots-are-helping-customers-and-partners-drive-pragmatic-innovation-to-achieve-business-results-that-matter/#:~:text=The%20Copilots%20and%20agents%20helped.run%20their%20workflows%2020%25%20faster.>



Workload Coordination	ClickUp Brain AI	Smart task assignment and automated deadline tracking	Up to 30% boost in team coordination productivity ⁶	Tough to quantify
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Potential Redundancies

Based on AI capabilities and the workflow descriptions:

- **Junior associates with repetitive workflows (Dylan G):** his workflows involve manual data entry and compilation (task delegation, client comms, document compilation and upload) and with AI, his role can be replaced with a fractional admin role or terminated completely

AI Implementation Roadmap

Phase 1: Assessment & Pilot (Weeks 1–3)

- Identify AI champions (e.g., Harmony C and Helly R).
- Audit current tools (SharePoint, Excel, Outlook) for integration readiness.
- Pilot **GPT-integrated Excel** and **Bill4Time AI** with Dylan and Irving.

Phase 2: Deployment (Weeks 4–8)

- Deploy **Harvey AI** or equivalent for litigation report drafting.
- Introduce **Laurel** for automatic time capture.
- Implement **ChatGPT Copilot** for drafting emails and responses.
- Train staff in new workflows.

Phase 3: Consolidation (Weeks 9–12)

- Roll out **Litera AI** or similar for document automation.
- Replace manual data input with automated Power Automate scripts.
- Monitor productivity metrics and billing targets.

Phase 4: Evaluation & Expansion (Weeks 13–16)

- Review metrics (billable hours, turnaround time, error rate).

⁶ <https://clickup.com/ai>



- Adjust team structure — reassign or reduce low-efficiency roles (e.g. Dylan G).
- Expand AI to support Business Management and Admin/Doc Control units.

Business Management

Role/Task Area	AI Tool	Use Case	Expected Efficiency Gain	Cost Savings / ROI Estimate (with Reasoning)
Workflow Automation (Declan R)	Zapier AI + Make.com + Python/GPT scripting	Automate dashboard updates, employee onboarding/offboarding, report creation	Complete removal of workload	Declan spends ~80-90% of time on admin/automation. Complete termination would save \$40k/year (assuming that is the average salary)
Marketing & Content (Jose M)	Jasper AI or Copy.ai + GrammarlyGO	Generate and refine marketing copy for 4 brands; draft blogs, newsletters	40% increase in content engagement, 3-5 hours saved/week/marketer, 93% faster creation of campaigns ⁷	Jose is overstretched across 4 entities. A platform to centralize all his marketing capabilities would greatly free up his hours on AI integration, backend and vendor relations
Document Generation (Connie D)	Formstack Documents	Auto-generate ERC invoices, property reports, internal updates	30+ hours saved per team/month	40 hours/week * 5 people * 4 weeks/month = 800 hours/team/month, 30/800 is around a 4% time saving
Client Comms & Scheduling (Sophie Y)	Clara AI or x.ai + ChatGPT Plugins	Automate follow-ups, appointment booking, client reminders	Complete removal of workload	Sophie Y's EA role can be fully automated with AI
IT Support & System Admin (Declan R)	Aisera IT AI + Microsoft Azure Copilot	Resolve tickets, automate password resets, software issue	90% average support cost savings ⁸	40% of Declan R's time is on system admin, a 90% reduction in this area would make his role

⁷<https://www.jasper.ai/solutions/by-industry/ecommerce-and-retail>

⁸<https://aisera.com/>



		resolution		redundant
Vendor Coordination & Invoicing (Connie D)	Relevance AI + Bill.com	Smart routing of vendor emails, invoice classification, and approval chains	5.5 hour/week/team ⁹	Connie D spends 25-30 hours a week on ERC tasks so the 5.5/hour/week/team saving would come primarily from her hours
Project & Task Coordination (Teamwide)	Notion AI or ClickUp AI + Loom + AI dashboards	Automate task assignment, progress tracking, generate quick video SOPs	N/A	Connie D “does not use a structured task management system”, Declan R’s job could be fully replaced with workflow management software

Suggested Redundancies / Role Changes

- **Connie D:** A substantial part of her ERC refund monitoring, document prep, and contractor communication could be automated via Formstack, Bill.com, and AI email agents. This makes her position partially redundant. Recommend phasing her out or moving to a fractional role (0.5 FTE)
- **Sophie Y:** Assistant functions could be absorbed with Clara AI, especially once SOPs and scheduling logic are automated. Recommend redeploying her full-time to ERC quality control or property management, eliminating duplicative EA work.
- **Declan R:** Workflow automation and systems admin take up 80-90% of this time - this could be easily automated, allowing his role to be converted into a fractional one or outsourced to a different department
- **Lead Generation - Caprae’s own scraper** - would save Jose M and Pep G significant time

AI Implementation Roadmap for Business Management

Phase 1 – Assessment & AI Literacy (Weeks 1–2)

- Conduct tech audit of Declan’s automations.
- Train team on AI basics (Prompting, data flows, Zapier, GPT).
- Create SOPs for marketing and ERC workflows with AI plugins in Notion.

⁹<https://www.commercialpaymentsinternational.com/news/bill-com-leverages-ai-for-business-payments-platform/>



Phase 2 – Tool Deployment (Weeks 3–6)

- Deploy Jasper AI for Jose M's content calendar (automate blog, SMS drafts).
- Launch Formstack + MS Copilot for Connie's ERC billing and reporting.
- Implement Clara AI for Sophie's scheduling and inbound client triage.

Phase 3 – Workflow Optimization (Weeks 7–10)

- Replace manual reporting in Monday.com with automated dashboards (Declan).
- Set up Relevance AI to route and prioritize vendor emails.
- Introduce video SOPs via Loom AI for training transitions.

Phase 4 – Staff Realignment & Scaling (Weeks 11–14)

- Phase out redundant work from Connie D (0.5–1.0 FTE cut).
- Move Sophie Y into a full ops role.
- Evaluate expanded AI usage across the tax and admin teams.

Tax Team

1. Automating Data Entry with OCR and Tax Document AI

Jacinta A currently spends a lot of time manually inputting data and feels unclear about her responsibilities and workflow. In her interview on August 27, 2024, she said: *"It's also a little bit more time-consuming for [the India team] to do it. So it's easier for me to do it as well."* Tasks like entering info from tax documents could easily be handled by AI tools that use character recognition and tax-specific extraction logic. This tech can cut data entry time by up to 70%, meaning Jacinta A could just review and double-check the results instead of typing everything line by line. That way, she'd have more time to focus on talking to clients and handling exceptions.

Strategy:

Set up an AI-powered OCR workflow using tools like SurePrep or AutoEntry to digitize scanned tax docs. Then plug the data straight into Lacerte for further automation. Quality checks can be done by mid-level reviewers (like Colin H—or even Jacinta A), and anything that looks off can be flagged for manual review. Start with a pilot using the 50 most common document types, and once it's working smoothly, roll it out fully.

2. AI Assistant for Client Follow-ups and Document Requests



Several team members (including Jacinta A, Bill G, and Jonny A) said they spend a lot of time manually following up with clients. Ken P mentioned doing repetitive support tasks via email and phone, and Jacinta A expressed frustration with tools like Monday.com lacking automation. An AI assistant—like an email or text bot—could handle reminders, request missing documents, and even sort out urgent issues, saving up to 40% of the time usually spent on client communication.

Strategy:

Build a ChatGPT-powered assistant that connects with Outlook and Monday.com. It can use pre-written templates to answer FAQs, explain how to upload documents, remind clients about missing files, and collect feedback. The AI could also prioritize tasks by how important the client is or how urgent the issue is, so more serious things get handled first. If anything unusual pops up or the AI gets stuck, Employees D or B can jump in. Start with a test run for one tax season with a small group of clients, and have Employees D or B regularly review the AI's work before scaling it across the team.

3. AI-Powered Tax Return QA Assistant

Colin H shared how frustrating it is to fix mistakes from the offshore team, and Bill G also said that returns are often inaccurate and require his personal attention. Adding an AI quality check layer that uses rule validation and machine learning to catch common issues—like missing SSNs or unusual deductions—could catch problems before they reach reviewers, saving time and energy.

Strategy:

Create an AI engine using past Lacerte return data that flags problems like big year-over-year number changes, wrong taxpayer ID formats, or missing signature pages. This tool would act as a first-level filter, flagging risky returns for closer review. You could build this with Python, using exports from Lacerte and libraries like pandas and regex for processing.

4. Smarter Task Assignment in Monday.com Using AI

The team isn't consistent in using Monday.com, and most task assignments are still done manually. Jacinta A finds the system confusing, while Bill G sees its value when used properly. Just like in suggestion #2, if we use AI to assess urgency and workload first, then assign tasks accordingly, we can reduce the time spent manually managing tasks and make sure we hit our service targets more consistently.

Strategy:

Train an AI model using past Monday.com data to automatically assign tax return tasks based on things like upcoming deadlines, employee workload, and client priority. The automation should also handle escalations, overdue alerts, and workload balancing. Try it out first with Bill G's workflow since he's already familiar with the system and can help refine it.



Admin Team

1. Automated Reconciliation Assistant

Right now, Flick A spends about 40% of his week (10–12 hours) manually reconciling bank statements, checking balance sheets, and handling check payments using Excel and QuickBooks. A lot of this work is just repetitive data checking. If we bring in an AI tool for reconciliation, we could seriously cut down the time it takes.

Strategy:

Try out machine-learning platforms like Vic.ai or Docyt that plug into QuickBooks and can automatically match transactions, flag anything that doesn't look right, and generate draft reports. AH would just need to review the flagged items instead of doing the whole thing manually. We'd want to test the system over a few weeks and have AH review the AI's results. Once things look solid, we can roll it out company-wide.

2. AI Email Sorting + Auto-Filing System

Employees F and E have both mentioned that sorting through emails and organizing documents eats up way too much of their time. AC, who handles document control, also said, “*emails are time consuming*” and “*downloading and uploading takes a while*.” An AI helper could be trained to do this automatically—sort emails, pull out attachments, and file them away properly.

Strategy:

Use Microsoft Outlook's built-in AI sorting tools along with something like Zapier or Power Automate. The system can rename attachments based on who sent them, the date, and the project name, and then drop them into the right SharePoint folders. We can try this with AC's inbox first. If the system hits 90% accuracy, we can roll it out to everyone.

3. Bot for Logging + Mail Processing

Ariel H spends around 70% of her time handling incoming paper mail—scanning, sorting, and then manually updating Monday.com and Lacerte. This becomes even more intense during tax season. We could save a ton of time by automating this whole flow.

Strategy:

Use Power Automate Desktop to watch the folder where scanned mail gets saved. As soon as something new comes in, it can trigger a workflow to read the barcode or QR code and auto-fill the info into Monday.com. Then E just needs to review and make sure everything looks good.



4. Smart Payment Scheduling

AH also takes care of vendor payments and the approval process. Right now, it's all done manually—writing checks, tracking vendors, the whole thing. There's no real system in place. We could use AI to predict when payments are due, draft approval memos, and send out weekly payment summaries.

Strategy:

Connect QuickBooks Online with a Power BI dashboard. AI can use historical data to predict upcoming payments and automatically create summaries in Excel or Teams. These summaries can show payment dates, approval status, and flag any overdue items. We'll track how well it works over 30 days and adjust as needed.