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Capture the Shift

From Process Gaps Detection & Prevention to Automation

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Business need

**Reduce E&O exposure
from procedural gaps**

Turning data into insight with AI.

~77,000

Procedures
analyzed

5,132

Improvement
opportunities

595

Automation
candidates

From **process gaps** to **growth opportunities**

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Missing Escalation Paths

Procedures lacking defined escalation when exceptions occur

Incomplete Follow-Ups

Steps that don't confirm task completion

Absent Validation Steps

No checkpoints to verify accuracy before proceeding

From opportunity to action

AI Detection + Human Context = Action

Results:

- Standardized minimum data requirement
- Strengthened client confirmation language
- Reduced E&O exposure
- Improved service

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Data & AI: The Coachella Effect



AI without data...

**All the talent...
nowhere to land**

The background features a stage with a large, dark, peaked roof structure. Several spotlights are mounted on the roof, casting bright beams of light downwards. The stage is set against a sunset sky with orange and purple hues. In the foreground, there is a digital overlay of data visualizations, including bar charts, pie charts, and a grid pattern, all in shades of blue and purple. The overall scene suggests a high-tech, data-driven environment.

Clean, Reliable Data = The stage

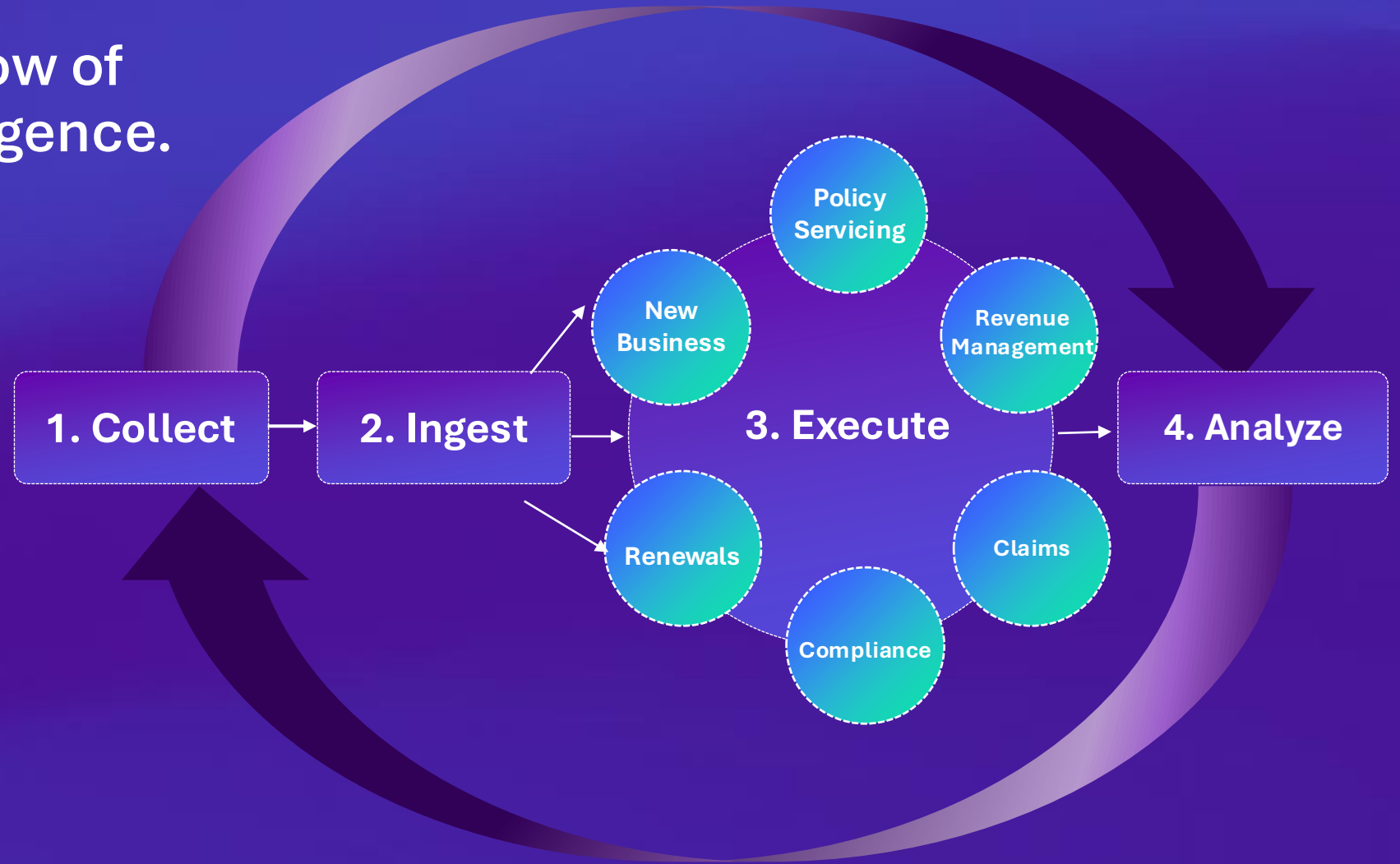
This is where everything starts

A vibrant scene from the Coachella music festival. In the background, a large stage is illuminated with bright lights, and the word "COACHELLA" is visible on its structure. To the left, a Ferris wheel is partially visible against a sunset sky. The foreground is filled with a dense crowd of people, many with their arms raised, capturing the festive atmosphere. A semi-transparent dark blue banner with a dashed border is overlaid across the middle of the image.

Data + AI = One Epic Party

Intake to insight:

The end-to-end flow of operational intelligence.



Data informs. AI assists. Humans decide.

Data informs

- Creates a single source of truth
- Reveals patterns, trends, and gaps
- Builds trust in decisions and outcomes

AI assists

- Surfaces insights at scale
- Identifies risks and opportunities faster
- Recommends actions and next best steps

Humans decide

- Apply context, judgment, and experience
- Balance risk, ethics, and business priorities
- Take action and drive accountability

Key questions

- 01** What outcomes do you want to achieve?
- 02** Assess your current data readiness. Where are you in your data strategy?
- 03** Who in your organization owns the 'stage', the foundation of clean, trusted data?
- 04** Where in your organization could better data unlock real, measurable outcomes with AI?

**Is your data
ready for the
AI spotlight?**



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Thank you.

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