

# Future Horizons in Finance for SaaS Industry

Do More with Less Using AI for Business Success

The background of the slide is a dark, muted photograph of a workspace. It shows a portion of a laptop keyboard with Cyrillic characters, a dark coffee cup, and a spiral-bound notebook. The overall tone is professional and focused.

## KNOWLEDGE

# Learning Objectives

Identify how to set a data foundation and automate workflows to grow and scale.

Recognize the importance of defining SaaS metrics such as CAC and customer retention.

Evaluate how AI can automate transaction processing, as well as how companies are now viewing their systems data strategies to support it.

### CPE INFORMATION

Program Level: BASIC  
Recommended CPE: 1  
Field of Study:  
Information Technology

WELCOME

# Today's Presenters



**Scott Schimberg**

Partner  
Armanino



**Justin Mitkus**

Director, Consulting  
Armanino



**Chuck Bunting**

Financial Industry Advisor,  
Tech & Media  
Workday

WHAT WE'LL DISCUSS

# Today's Agenda

- The Fundamentals of AI
- AI Use Cases
- Choosing the Right Technology
- Emerging Workforce Skillsets
- Closing and Q&A



ARMANINO

# Firm Overview

*Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.*

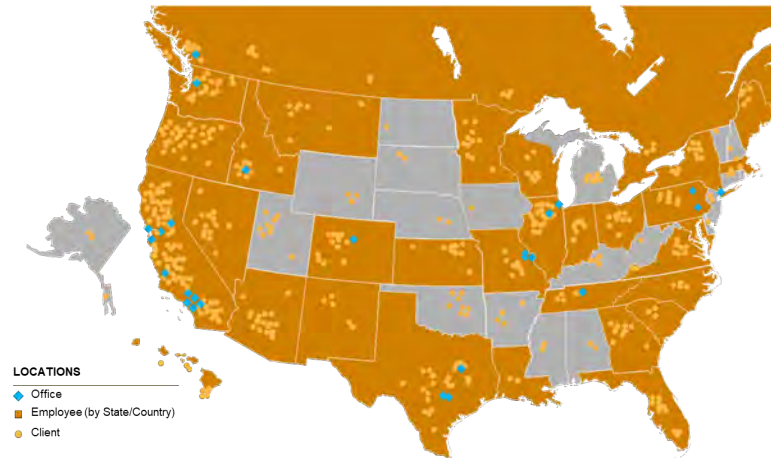
## Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of **our clients, people and our communities.**

## Snapshot

2500+ Employees  
 Team Members in 23 States  
 18th Largest CPA & Consulting  
 Largest Niche: Technology

## Locations



- CALIFORNIA**
  - San Ramon
  - San Jose
  - San Francisco
  - Los Angeles (2)
  - Irvine
  - El Segundo
  - Woodland Hills
  - San Luis Obispo
  - Torrance
- WASHINGTON**
  - Bellevue
- COLORADO**
  - Denver
- IDAHO**
  - Boise
- TENNESSEE**
  - Nashville
- TEXAS**
  - Austin (2)
  - Dallas
- ILLINOIS**
  - Chicago
  - Naperville
- MISSOURI**
  - St. Louis
  - St. Charles
- PENNSYLVANIA**
  - Philadelphia
  - Scranton
- NEW YORK**
  - New York City
- CANADA**
  - Vancouver

### AFFILIATE COMPANY



### RECOGNITION & AWARDS



TRUSTED EXPERTISE

# Workday Services Partner



**Deploy leading accounting, finance and analytics systems to enable your organization's growth and digital transformation.**

As a **Workday Services partner**, we bring extensive industry and finance leadership expertise to help you **strategize and build a plan for success**. We can act as your full transformation guide – taking your plans through from inception to deployment to continuous optimization.

## PRODUCTS

Workday  
Adaptive  
Planning

Workday  
Financial  
Management

Workday Human  
Capital  
Management

Workday  
Prism  
Analytics

Workday  
Accounting  
Center

FUTURE OF FINANCE

# When was AI Invented?

SC

When was AI invented



The concept of artificial intelligence (AI) has been around for centuries, but the term "artificial intelligence" was coined by John McCarthy in 1955. McCarthy, along with Marvin Minsky, Nathaniel Rochester, and Claude Shannon, is considered one of the founders of AI.

AI as a field of study and research really began to take off in the mid-20th century with the advent of digital computers. Early AI research focused on tasks such as game playing and problem-solving. The development of neural networks in the 1950s and 1960s also contributed to the growth of AI as a field.

In the years since its inception, AI has gone through several waves of advancement, with periods of intense research and development followed by periods of reduced funding and interest, known as "AI winters." Currently, we are in a period of rapid progress in AI, with advancements in machine learning, deep learning, and other techniques leading to the development of AI applications in various fields.

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# Machine Learning vs Deep Learning



Compare and contrast machine learning vs deep learning for AI in a table



Certainly! Here's a comparison table highlighting the differences between machine learning and deep learning in the context of artificial intelligence:

Aspect	Machine Learning	Deep Learning
Definition	Subset of AI where algorithms learn patterns from data to make predictions or decisions.	Subset of machine learning using neural networks with multiple layers (deep neural networks).



# Neural Networks & Humans

SC

compare and contrast Neural networks to humans in a table



Aspect	Neural Networks	Human Brain
<b>Architecture</b>	Composed of interconnected artificial neurons in layers.	Comprises approximately 86 billion neurons connected in a vast network.
<b>Learning Process</b>	Learns from data through mathematical optimization algorithms.	Learns from experience, sensory input, and interaction with the environment.
<b>Learning Abilities</b>	Capable of learning complex patterns from vast amounts of data.	Can learn from various sensory inputs, adapt, generalize, and exhibit creativity and reasoning.
<b>Processing Speed</b>	Can process vast amounts of data quickly, especially with GPUs.	Human brain processes information more slowly but excels at parallel processing and complex tasks.
<b>Energy Efficiency</b>	Requires significant computational power and energy resources.	Remarkably energy-efficient, consuming a fraction of the power of artificial neural networks.
<b>Flexibility</b>	Flexible in adapting to different types of data and tasks.	Highly adaptable, capable of learning new tasks without requiring extensive reprogramming.
<b>Fault Tolerance</b>	Can degrade gracefully and continue functioning with damaged units.	Exhibits remarkable fault tolerance, allowing for continued functioning even with damaged neurons.

<b>Creativity and Emotion</b>	Lacks creativity and emotional intelligence.	Displays creativity, emotional intelligence, empathy, and complex emotional responses.
<b>Self-awareness</b>	Lacks self-awareness and consciousness.	Humans possess self-awareness, consciousness, and the ability to introspect.
<b>Hardware</b>	Implemented on digital computer hardware, such as CPUs and GPUs.	Biological and complex, made up of interconnected neurons and synapses.
<b>Parallel Processing</b>	Highly parallel, allowing for the simultaneous processing of data.	Human brain excels at parallel processing, enabling multitasking and rapid decision-making.
<b>Learning Efficiency</b>	Requires substantial amounts of labeled data for effective learning.	Humans can learn from sparse and unlabeled data, often requiring fewer examples to grasp concepts.
<b>Adaptability</b>	Requires manual adjustments in architecture and hyperparameters.	Human brain adapts and learns without manual adjustments, continuously improving its performance.
<b>Limitations</b>	Limited by available computational resources and data quality.	Limited understanding of consciousness and the human mind, and susceptible to various cognitive biases.

It's important to note that while artificial neural networks have made significant advancements, they are far from matching the complexity, efficiency, and adaptability of the human brain in various cognitive tasks. The comparison highlights the current state of technology in neural networks relative to the capabilities of the human brain.

# Neural Networks & Humans

SC

Tell me what is better Neural networks for AI or the human brain and why in a table.



Aspect	Neural Networks for AI	Human Brain
<b>Processing Speed</b>	Can process vast data quickly, especially with specialized hardware like GPUs.	Slower processing speed compared to artificial neural networks, but excels at parallel processing and complex tasks.
<b>Learning Abilities</b>	Capable of learning complex patterns from large datasets.	Highly adaptable, capable of learning from diverse sensory inputs, exhibiting creativity, reasoning, and emotional intelligence.
<b>Energy Efficiency</b>	Requires substantial computational power, making them energy-intensive.	Remarkably energy-efficient, consuming significantly less power for similar tasks.
<b>Flexibility</b>	Flexible in adapting to different types of data and tasks with appropriate architectures.	Highly adaptable, capable of learning new tasks without extensive reprogramming.
<b>Creativity</b>	Lacks intrinsic creativity; generates patterns based on existing data.	Demonstrates genuine creativity, innovation, and the ability to create entirely new concepts and ideas.
<b>Problem Solving</b>	Excellent at pattern recognition and solving specific, well-defined tasks based on training data.	Exceptional problem-solving abilities, especially in complex, ambiguous, and real-world scenarios.

<b>Emotional Intelligence</b>	Lacks emotional intelligence and empathy.	Exhibits complex emotional intelligence, empathy, and the ability to understand and respond to human emotions.
<b>Adaptability</b>	Requires manual adjustments in architecture and hyperparameters.	Adapts and learns without manual adjustments, continuously improving its performance.
<b>Understanding</b>	Lacks true understanding; processes data based on statistical patterns.	Possesses genuine understanding, consciousness, and the ability to reason and introspect.
<b>Reliability</b>	Reliability depends on data quality, quantity, and the model's complexity.	Highly reliable, capable of making accurate judgments even in uncertain and novel situations.
<b>Contextual Learning</b>	Limited in contextual understanding; lacks true contextual awareness.	Exhibits profound contextual understanding, connecting disparate pieces of information to form a comprehensive understanding of the world.

In summary, while artificial neural networks are powerful tools for specific tasks and have made significant advancements, they still fall short in many aspects compared to the complexity, adaptability, and intelligence of the human brain. The human brain's ability to understand, reason, learn from sparse data, exhibit creativity, and demonstrate emotional intelligence gives it a unique advantage over artificial neural networks. However, it's important to note that artificial neural networks have their own strengths, particularly in handling vast amounts of data quickly and performing specific tasks based on patterns in the data. The choice between the two depends on the specific task and the goals of the AI application.

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# Key Takeaways



AI concepts have been around for a long time.



Waves of improvements have occurred over time; we are in an improvement wave now.



Matching the use cases to the right type of AI is important.

- Goals and outcomes expected
- Large amounts of data vs small data sets
- Consistency of data quality



# Safe Harbor Statement

This presentation may contain forward-looking statements for which there are risks, uncertainties, and assumptions. If the risks materialize or assumptions prove incorrect, Workday's business results and directions could differ materially from results implied by the forward-looking statements. Forward-looking statements include any statements regarding strategies or plans for future operations; any statements concerning new features, enhancements or upgrades to our existing applications or plans for future applications; and any statements of belief. Further information on risks that could affect Workday's results is included in our filings with the Securities and Exchange Commission which are available on the Workday investor relations webpage: [www.workday.com/company/investor\\_relations.php](http://www.workday.com/company/investor_relations.php)

Workday assumes no obligation for and does not intend to update any forward-looking statements. Any unreleased services, features, functionality or enhancements referenced in any Workday document, roadmap, blog, our website, press release or public statement that are not currently available are subject to change at Workday's discretion and may not be delivered as planned or at all.

Customers who purchase Workday, Inc. services should make their purchase decisions upon services, features, and functions that are currently available.



# Office of the CFO

## AI Use Case



**Automated & Scalable**  
OCR scanning



**Streamline Close**  
AI as a detective



**Predict Outcomes**  
Recommend and Reconcile

### Challenge

### AI Use Case

### Impact

#### Automated & Scalable Financial Operations

- Manual anomaly detection
- Limited automation
- Manually matching invoices to payments

- Journal Insights
- Supplier Invoice Automation
- Customer Payment Matching

- Improve Finance efficiency and scale
- Improve compliance and risk mitigation
- Decrease time-to-close

#### Continuous and Company-Wide Planning

- Extended planning cycle due to anomalies
- Accurate and predictive plans are increasingly difficult

- Planning Anomaly Detection
- Outlier Reporting
- Machine Learning Forecaster

- Increase forecast accuracy
- Increase planning efficiency
- Reduce time to plan

#### Proactive Spend Management

- High volume of active contracts
- Spend category challenges
- High volume of documents to scan
- Manual audits of expense reports

- Contracts Semantic Search
- Spend Category Recommendations
- Invoice Scanning with OCR
- Expense Protect

- Improve Finance efficiency and scale
- Proactive controls and compliance
- Improve vendor negotiation and visibility benefits

# AI in Workday



## Touchless Transactions

**Where** Procure to Pay - **Supplier invoice automation**

**What** Upload and scan invoice, automatically route

**Why** Eliminates manual data entry, **saving time** and **reducing cost**



## Streamline Close

**Where** Record to Report - **Journal Insights**

**What** Proactively surface journal anomalies as they occur

**Why** AI becomes the detective, **giving you time back**



## Predicative Processes

**Where** Contract to Cash - **Customer payment application**

**What** Machine learning recommends the invoices to match

**Why** **Eliminates manual matching**

Focus on strategic review of data and analytics, not on manual processes



# Supplier Invoices

### Create Supplier Invoice

Supplier Invoice (empty) Invoice Number - new -

#### Invoice Information

Company: Global Modern Services, Inc. (USA)

**Supplier: Office Depot**

Remit-To Connection: Office Depot - Default Remit-To

Currency: USD

Invoice Date: 09/22/2023

Invoice Received Date: MM/DD/YYYY

Control Total Amount: 0.00

#### Terms and Taxes

Payment Terms: 2% 10, net 30

Discount Date: 10/02/2023

Due Date: 10/22/2023

Due Date Override: MM/DD/YYYY

Default Payment Type: Check

Override Payment Type:

Reference Type:

Originating Country:

Payment Purpose:

#### Invoice Reference Information

Ship-To Address: One Bryant Park, Bank of America Tower New York, NY 10044 United States of America

Handling Code:

On Hold:

Supplier Document Received:

Supplier's Invoice Number:

External PO Number:

Referenced Invoices:

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Invoice Lines | Tax | Currency Rate | Prepaid Details | Additional Fields | Attachments | Work Queue Information | Process History

Invoice Lines: 1 Item

Order	*Company	Item	Item Description	Supplier Item Identifier	Purchase Item	Spend Category	Ship-To Address
	Global Modern Services, Inc. (USA)					<ul style="list-style-type: none"><li>Recommended</li><li><b>Hardware - Computers</b></li><li>Mobile Office Assets</li><li>Office Furniture &amp; Equipment</li><li>Computer Accessories</li><li>Office Supplies</li></ul>	One Bryant Park Bank of America Tower N York, NY 10044 United States of America

Submit | Save for Later | Cancel



# Supplier Invoice OCR Scanning

## View OCR Supplier Invoice

OCR Supplier Invoice		Override Company	Global Modern Services, Inc. (USA)
Scanned Attachment	ProTech-Invoice_PO-4288 GMS.pdf	OCR Suggested Company	(empty)
Supplier Invoice	Supplier Invoice: 22897	OCR Supplier	(empty)
Created by Worker	Teresa Serrano	OCR Supplier Invoice Number	421010623
Assigned to Worker	(empty)	OCR Invoice Date	01/06/2023
Scan Status	Success	OCR Due Date	(empty)
OCR Has Failed		OCR Invoice Total Amount	500.00
OCR Start Time	01/10/2023 09:26:39.208 PM	OCR Header Tax Amount	0
OCR End Time	01/10/2023 09:26:53.578 PM	OCR Freight Amount	0
OCR Duration (sec)	14	OCR Payment Terms Text	Net 30
OCR Possible Duplicate Invoice	(empty)	OCR Purchase Order Text	PO-4288
		OCR Purchase Order	PO-4288
		OCR Suggested Purchase Orders	PO-4288
		OCR ML Suggested Purchase Order	(empty)
		Currency	USD
		OCR Currency	USD





# Cash Applications

**View Cash Application Insights** 한글

Company **Global Modern Services, Inc. (USA)**    Currency **USD**

Payments With Recommendations **3 items**

Payment	Company	Transaction ID	Payment Date	Payment Type	Payment Reference	Customer	Application Status	Currency	Payment Amount	Recommended Invoices	Dismiss	Review
Q	Global Modern Services, Inc. (USA)	3564	12/09/2022	Wire	11905	Dunder-Mifflin	Unapplied	USD	31,800.00	Customer Invoice: 11905	<input type="button" value="Dismiss"/>	<input type="button" value="Review"/>
Q	Global Modern Services, Inc. (USA)	GMSL-7	01/07/2023	Check		Initech	Unapplied	USD	1,250.00	Customer Invoice: 13721 Customer Invoice: 13723 Customer Invoice: 13728 Customer Invoice: 13732 Customer Invoice: 13733	<input type="button" value="Dismiss"/>	<input type="button" value="Review"/>
Q	Global Modern Services, Inc. (USA)	GMSL-2	01/01/2023	Check		North Tahoe Power Tools	Unapplied	USD	2,175.00	Customer Invoice: 13718 Customer Invoice: 13719 Customer Invoice: 13720 Customer Invoice: 13722	<input type="button" value="Dismiss"/>	<input type="button" value="Review"/>



# Journal Anomaly Detection

## Correct and Dismiss Journal Line Anomalies 6400:Legal & Service Fees

Impacted Debit Amount 196,000.00 USD    Impacted Credit Amount 0.00 USD    Dismissed Anomalies 0    Confirmed/Corrected Anomalies 1

### Filters

Company \* Global Modern Services, Inc. (USA)    Reporting Currency \* USD    Period \* 2022 - Dec    Time Period \* Current Period YTD

1 item

View Journal	Transaction	Accounting Date	Company	Anomaly Reason	Current Worktags	Recommendation	Debit Amount	Credit Amount	Currency	Journal Source
<input type="checkbox"/> View Journal	22869	12/12/2022	Global Modern Services, Inc. (USA)	Cost Center	Cost Center: 72100 Field Marketing Location: San Francisco Region: US - West Spend Category: Legal & Auditing Fees Supplier: Baker Mckenzie LLP	Cost Center: 53000 Legal	196,000.00	0.00	USD	Supplier Invoice

Create Journal

Confirm Anomalies

Dismiss Anomalies

Cancel



# The Future



## Collections Letters

Page 3 of 9

### What You See

The message portion of the collection letter is generated in the email preview panel

### What To Do

Next, you want to include past invoices as part of the letter.

#### A. Scroll down

B. Click the Checkbox to Include Past Invoices



### AI Data Sources

Content generated using the following secure data sources:

- + Invoices
- Key Message
- Message Tone

**Create Collections Letter**

Email Template: Collections Letter

In the past 3 months, Collections Letter resulted in an average 44% increase in payments.

Message Tone: Level 3 - Very Urgent

Level 3 - Very Urgent is recommended based on amount past due and 2 previous emails.

Key Message: Personalized email

For example, "This would be great to have this resolved ahead of signing the new contract next week."

Include Past Due Invoices in Message:

Include Invoice Copies as Attachments:

Include Original Invoice File Attachments:

Send Letter Cancel

**ROUNDHILL CONSULTING**  
The spirit of business, redefined™

Dear Pamela,  
I trust this email finds you well. I wanted to follow up on our conversation from September 8th. I understand that you have transitioned into a new position, and I appreciate that you are still getting up to speed on this payment delay.

I want to take a moment to revisit the matter of the pending payment for the last 5 invoices. While I recognize that your responsibilities have shifted, it's important to ensure that we maintain a seamless continuation of our business relationship. Our commitment to delivering quality services remains unchanged, and I am confident that this adjustment will not hinder the prompt resolution of outstanding financial matters.

I kindly request that you address the pending payment at your earliest convenience to ensure that there are no disruptions in the flow of our collaboration. Clearing this outstanding amount will enable us to continue our partnership on a positive note and will contribute to the ongoing success of both our organizations.

I truly value the partnership we have built and your dedication to our shared objectives. I look forward to a swift resolution of this matter and continuing our collaboration in your new capacity. Thank you for your attention to this request, and please feel free to contact me if you have any questions or need further assistance.

## Contract Analysis

Page 3 of 10

### What You See

A split screen view where you can see the highlighted discrepancy on the scanned contract and the system contract data.

### What To Do

Rather than generate a proposed resolution, you click Something Else to enter a query.

### Click Something Else

The screenshot displays the Workday interface for contract analysis. At the top, there is a navigation bar with a menu icon, the Workday logo, and a search bar. The main content area is split into two panes. The left pane shows a scanned document titled "ORDER FORM 00383253.0" with a table of contract details. The right pane shows a system-generated table for the same contract.

**Scanned Contract Details:**

Field	Value
Customer Name	Bluestar Corporation
Workday Entity	Workday, Inc. 6110 Stoneridge Mall Road Pleasanton, CA 94568
MSA Effective Date	See MSA executed herewith
Order Effective Date	The later of the dates of the parties' signatures on the Signature Document
Order Term	May 9, 2023 through May 8, 2026
Currency	USD
Total Subscription Fee	195,001
Tenant Base Name	

**System Contract Data Table:**

Copy	Line Type	Line Status	Line Amount	Scheduled, In Progress, and Ready To Bill Amount	Billed Amount	Line Revenue Amount	Scheduled Deferred Revenue To Recognize	Recognized Deferred Revenue	Deferred Revenue Balance	From Date	To Date
	Fixed Amount	Active	89,160.00	89,440.15	29,719.85	88,190.00	84,648.43	4,311.57	25,408.28	05/09/2023	05/08/2026
	Fixed Amount	Active	34,257.00	32,844.79	11,422.27	34,297.00	32,600.92	1,667.08	5,765.15	05/09/2023	05/08/2026
	Fixed Amount	Active	46,762.00	81,134.78	16,967.25	49,732.00	47,298.52	2,465.48	14,153.77	05/09/2023	05/08/2026
	Fixed Amount	Active	21,873.00	14,581.37	7,260.63	21,873.00	20,614.30	1,067.68	5,232.95	05/09/2023	05/08/2026

On the right side of the interface, there is an "Analysis" panel. It contains two sections:

- Contract Comparison:** A message stating "Here is a comparison view of the contract and the end date as entered." Below this, it says "The discrepancy is highlighted." A question asks, "Would you like me to generate a proposed resolution to correct the discrepancy?" with buttons for "Yes", "No", and "Something else".
- Discrepancy Found:** A message stating "Here is the Bluestar Corporation contract where a discrepancy was found in the end date." A question asks, "Would you like to see a comparison against the contract?" with buttons for "Yes", "No", and "Something else".

At the bottom of the right panel, there is a "Contract Summary" section.

## Worksheets Formulas

Page 5 of 10

### What You See

A generated formula based on the information you provided.

### What To Do

You now want to insert this formula into your selected cell.

Click Insert into B15

#### AI Data Sources

Content generated using the following secure data sources:

- Report Data
- Worksheets Data

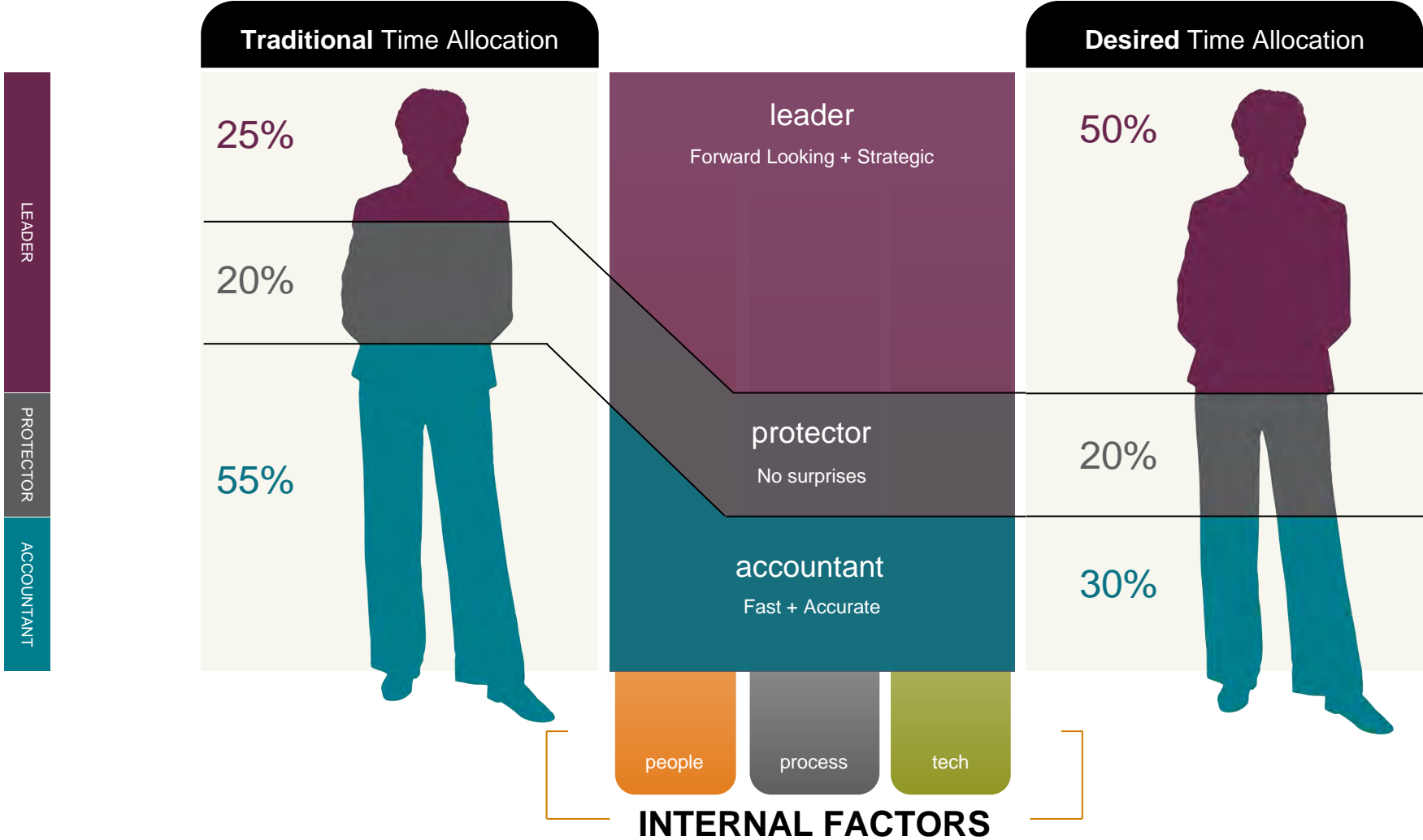
← Back

Next →

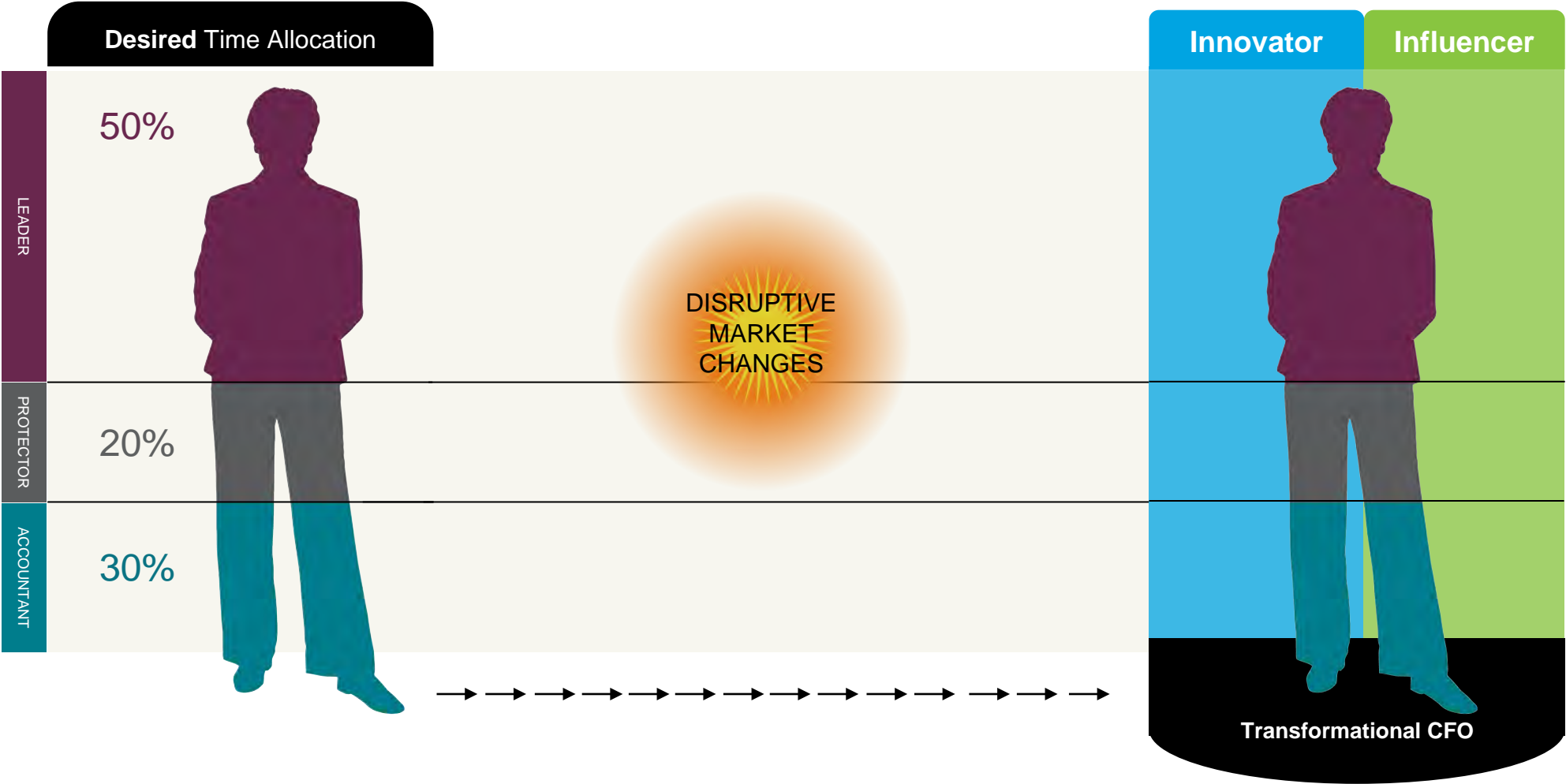
The screenshot shows a spreadsheet titled "Employee Comp Planning" with columns for Employee ID, Name, Hire Date, New Salary, Job Profile, Supervisor, Years of Service, Sales, and Proposed Bonus. A "Formula Writer" sidebar is open on the right, showing a prompt to generate a formula based on the provided information. The sidebar includes buttons for "Generate", "Explain", and "Optimize", and a "Generate" button at the bottom. The "Result" section shows the formula: `SORT(FILTER(Sheet1!B:I,Sheet1!F="Logan McNeil"),1,1)`. A "Learn More" link is also present.

Employee ID	Name	Hire Date	New Salary	Job Profile	Supervisor	Years of Service	Sales	Proposed Bonus
21237	Adam Carlton	1/3/00	\$100,785.50	Director, Employee Benefits	Logan McNeil	23	\$75,000	\$7,500.00
21011	Alexis Acceptance	6/1/20	\$120,556.80	Director, HR Shared Services	Logan McNeil	8	\$500	\$0.00
21008	Betty Liu	1/1/00	\$130,687.50	Director, Payroll Operations	Logan McNeil	23	\$20,111	\$2,011.10
21015	Daniel Betancourt	1/1/17	\$137,177.25	Director, Recruiting Services	Logan McNeil	6	\$7,344	\$734.40
21144	Dawn Myers	1/1/00	\$139,992.00	Director, Workforce Planning	Logan McNeil	23	\$5,400	\$540.00
21241	Dinah Johnson	10/4/10	\$73,950.00	Organization Development	Joe Roberts	13	\$1,900	\$1,190.00
21143	Javob Myers	3/1/10	\$55,166.80	Payroll Coordinator	Betty Liu	13	\$7,500	\$750.00
21007	Jacqueline Desjardins	1/1/10	\$70,917.19	Senior Benefits Analyst	Logan McNeil	13	\$12,934	\$1,293.40
21074	James Moore	1/1/00	\$87,054.01	Senior Payroll Specialist	Betty Liu	23	\$4,537	\$226.85
21145	Robert Hsing	1/1/07	\$70,917.19	Senior Statistics Analyst	Izzy Reitano	16	\$21,897	\$2,189.70

# CFO Evolution 2.0









# CFO Evolution 2.0





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# Emerging Workforce Skillsets

-  New set of skills in the workforce
-  Analyze large datasets and provide meaningful insight into the business
-  Building strategic relationships with the business partners and manage stakeholders
-  Ability to think critically and communicate
-  Moving away from manual, mundane work – manual data validation, updating management reports
-  Ability to identify opportunities and create value using technology

# Q&A

Thank you for  
attending!

## Additional Questions?

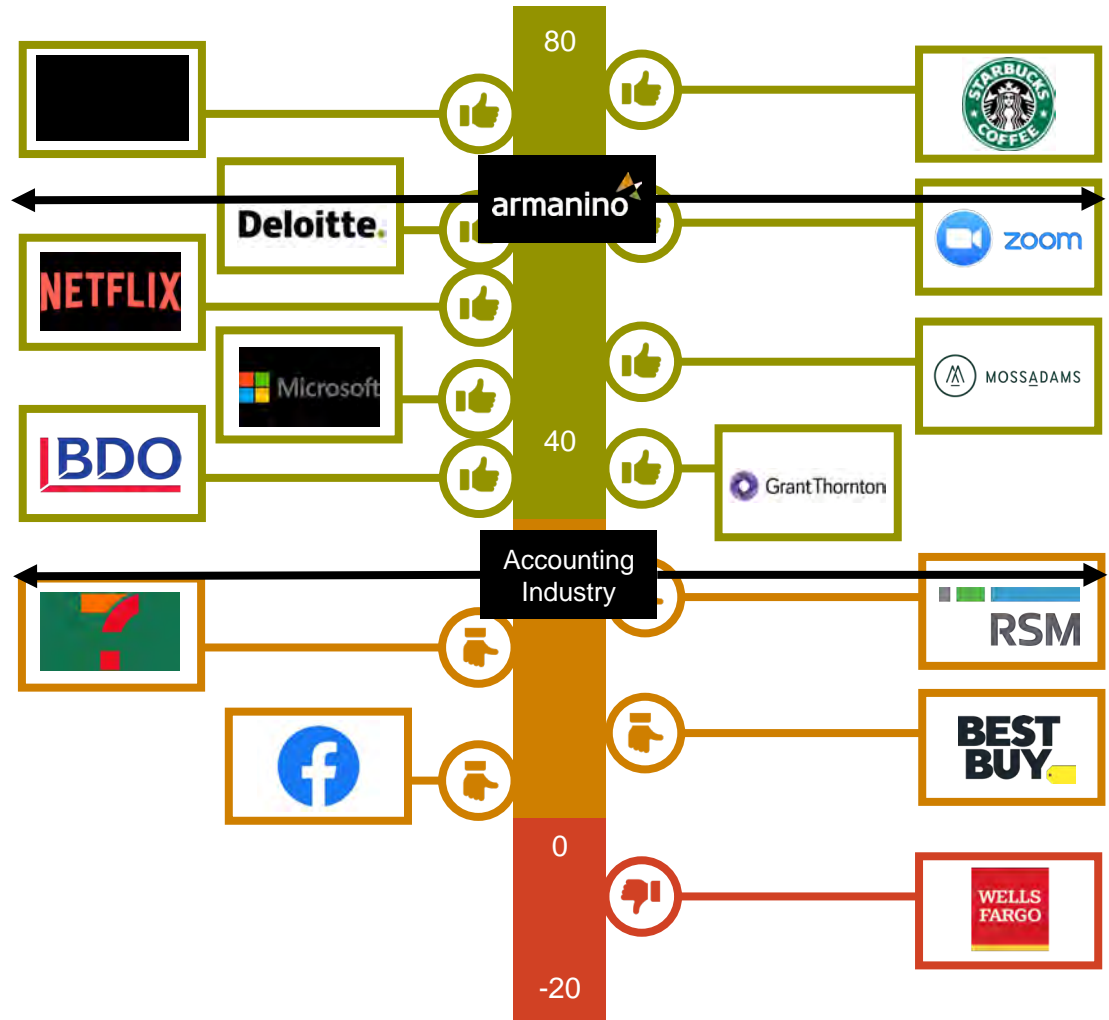
Reach out to one of our presenters or  
email us at: [Experts@armanino.com](mailto:Experts@armanino.com)



OUR CLIENTS' VIEW

# We're Just What You Need

A Net Promoter® Score (NPS) is used by more than two-thirds of Fortune 1000 companies. **Armanino's NPS (68) is almost two times higher** than the accounting industry average (38), and it places the firm scores closest to household name brands such as Starbucks, Peloton and Zoom.



# A New and Better Way for Today and Tomorrow

Equipping you with the insights and tools needed to redefine what's possible



## COMPLIANCE & REGULATORY

- Tax Planning
- Trust & Estate
- SOX
- Contract



## ASSURANCE & ADVISORY

- Cybersecurity
- SOC
- Restructuring
- Revenue Recognition



## STRATEGY & PLANNING

- Corporate Strategy
- Strategic Advisory
- Benchmarking
- Business Transformation



## STAFFING & DEVELOPMENT

- Payroll
- Health Benefits
- Executive Search
- Interim Placement



## TECHNOLOGY SYSTEMS

- ERP
- CRM
- Business Intelligence
- Managed Services



## ACCOUNTING & BACKOFFICE

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable



ADDITIONAL INFORMATION

# About Armanino & Our Values

## ARMANINO

# Additional Information on Our Values

Please explore the links below to learn more about our firm values and community outreach. From championing diversity and women leadership within the firm to committing to social and environmental change at the global level, our PVAs guide us every step of the way.



Armanino Foundation  
<https://armaninofoundation.org/>



Diversity & Inclusion  
<https://www.armaninollp.com/company/who-we-are/ideal/>



Women's Advancement  
<https://www.armaninollp.com/company/who-we-are/womens-initiatives/>




Certified B Corporation  
<https://www.bcorporation.net/en-us/find-a-b-corp/company/armanino-llp>

LIVING UP TO THE IDEAL

# Diversity & Inclusion

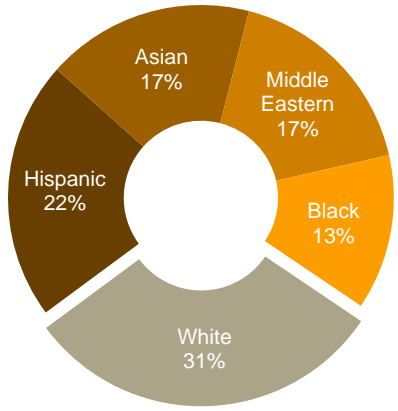
*Our differences make us stronger, smarter and more innovative to truly bring the best to the table for our clients and organization.*



**WE'RE LEADING TO ACT ON DIVERSITY AND INCLUSION!**

CEO Matt Armanino signed the **CEO Action for Diversity & Inclusion Pledge** on behalf of the firm with a commitment to develop programs and initiatives that identify and foster opportunities for underrepresented groups led by the IDEAL committee.

Women account for **56%** of our recruiting efforts in gender and POC account for almost **70%** in ethnicity.



Ethnicity	Percentage
White	31%
Hispanic	22%
Asian	17%
Middle Eastern	17%
Black	13%

Nationally ranked as best Accounting firm to work for:



Rank	Category
#12	Racial & Ethnic Diversity
#11	LGBT
#15	Women
#13	Overall Nationwide

## OUR COMMITMENT

# Women's Advancement



### INTERNATIONAL WOMEN'S DAY



A Bridge is a structure that actually carries a road or a path. As women move through their career journey, The Bridge provides support, connectors and a built infrastructure to help advance our women.

# 50%

of Armanino's newly elected partners for 2023 are women, underscoring the success of the firm's women's initiative to help women advance into leadership roles

### EXECUTIVE ACCESS PROGRAM

Launched in 2018, this program connects high-potential female managers directly with firm executives to promote and drive career advancement.



### PARTICIPATING IN MOVE

In partnership with the Accounting & Financial Women's Alliance, the MOVE Project challenges and equips firms and women to identify and address barriers to women's advancement.



OUR COMMITMENT

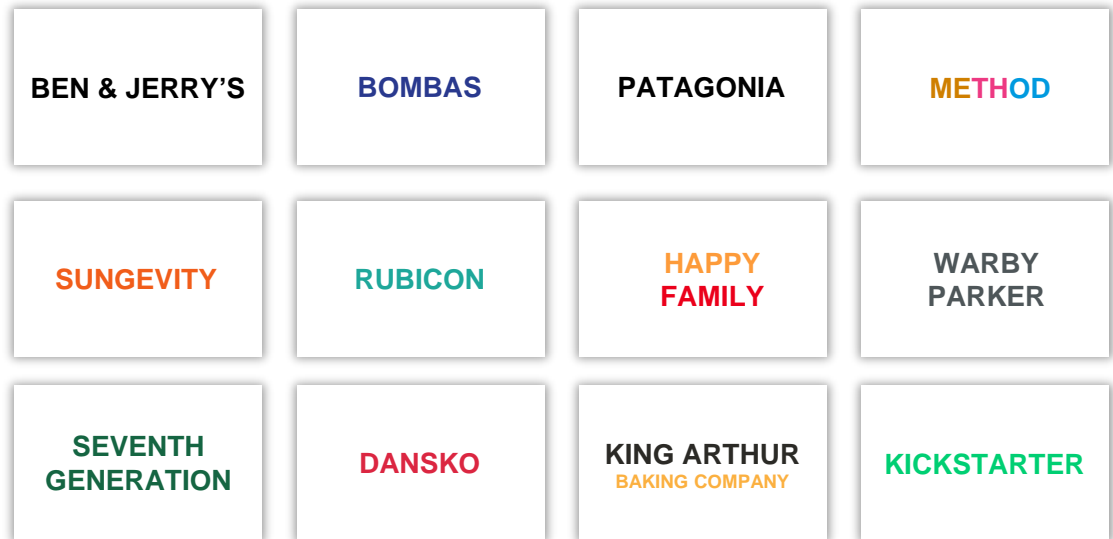
# Certified B Corporation



**ARMANINO HAS  
JOINED THE B CORP  
COMMUNITY**

Armanino is using its business as a force for good. By becoming a certified B Corporation, we are accelerating a global culture shift to redefine success in business and build a more inclusive and sustainable economy.

Certified B Corporations are a new kind of business that balance purpose and profit. They are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose. We are now among other great B Corporations pledged to making a positive impact.



GIVING BACK



## Mission

To assist charitable organizations that create a positive impact on the lives of people in our community.



The Armanino Foundation empowers our employees to give back to the community via:

- **The Great Give**
- **Dollars for Doers**
- **Volunteer Vacations**
- **Grants**

