

Technology Industry Solutions

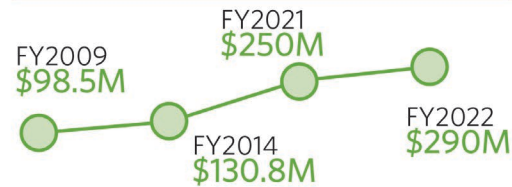
Digital Advisory – Platform & Solutions



About Cherry Bekaert

1500+

Employees Firmwide



\$290M+



Annual Revenue

140+



Partners

Serving
Clients
Across the
U.S. and Internationally



75+

 Years in
Business

Ranked a top **U.S. Accounting Firm**
by Accounting Today and Inside
Public Accounting

Member of Allinial Global,
**the 2nd largest accounting and
consulting association in the world,**
represented by over **256 fellow firms** in
99 countries with a combined
revenue of \$4.5312 Billion

- ▶ **National & Global reach,** local attention
- ▶ **Big 4 experience,** local firm feel
- ▶ Values forward, **people centered**
- ▶ High-touch client service
- ▶ Extensive experience with regulatory compliance, cybersecurity and digital transformation

Member of
Allinial GLOBAL®
An association of legally independent firms

**AMERICA'S BEST
ACCOUNTING
FIRMS** | **Forbes
2023**
POWERED BY STATISTA

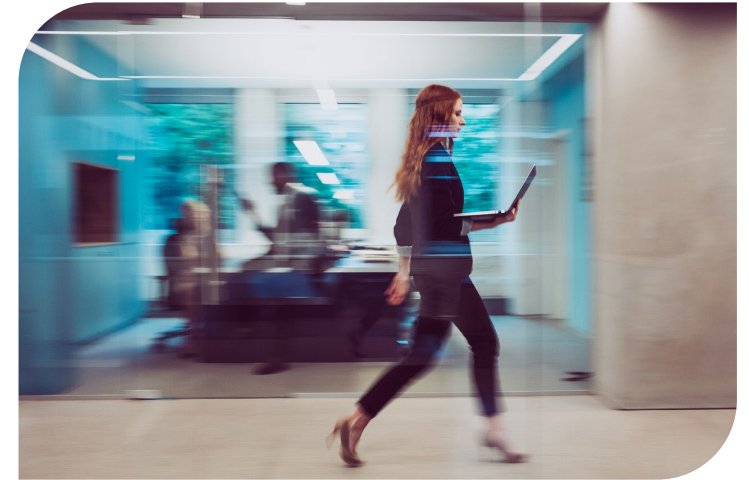
**AMERICA'S
BEST
TAX FIRMS** | **Forbes
2023**
POWERED BY STATISTA



Cherry Bekaert Digital Advisory



We help organizations **capture, manage, secure, and deliver information** to meet your strategic goals and objectives.



We **define and establish** efficient and scalable processes that can be augmented with the right **technology** and **people** to improve performance throughout an organization.



We **leverage** your existing **technology** investments and the cloud, offering prescriptive guidance to help you **deploy** open, flexible **solutions** to give your business a competitive advantage.



We Know Technology

- **Dedicated Technology Industry Group** specializing in advisory, assurance, tax and digital solutions
- Proudly serving **1,633 Technology** clients of all sizes and stages of maturity



ARTICLE

The AI Revolution: Business Applications Over the Years and Into the Future

Discover the evolution of AI in business from back-office functions to front-office innovation. Expl...

SEPTEMBER 07, 2022



ARTICLE

Going Global: Laying the Foundation for Growth in International Markets

Learn how to navigate risks and opportunities when going global. Find out how our advisors can help ...

SEPTEMBER 07, 2022



ARTICLE

Salesforce's MuleSoft Robotic Process Automation (RPA): Hyperautomation f...

Discover how Salesforce's MuleSoft RPA empowers middle-market organizations with hyperautomation, dr...

JULY 10, 2023



CASE STUDY

Visix, Inc. Utilizes Sage Intacct to Streamline Communication and Collabora...

Learn how Cherry Bekaert's Digital Advisory team has supported and guided Visix in their operation...



ARTICLE

How to Build an Enterprise Data Strategy Framework – Getting Started

In this article, we explore the framework of building an effective enterprise data strategy that can...

ARTICLE

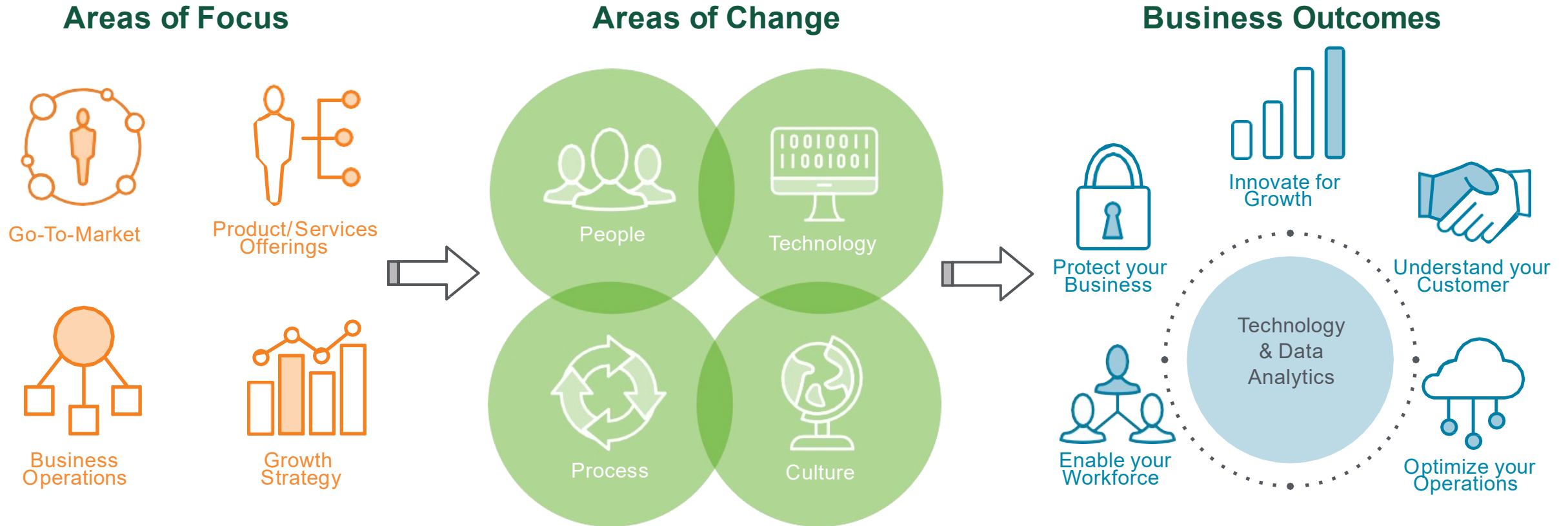
Getting Started with Cloud Migration

Learn what are the benefits of using cloud computing systems and how we can help you manage and migr...

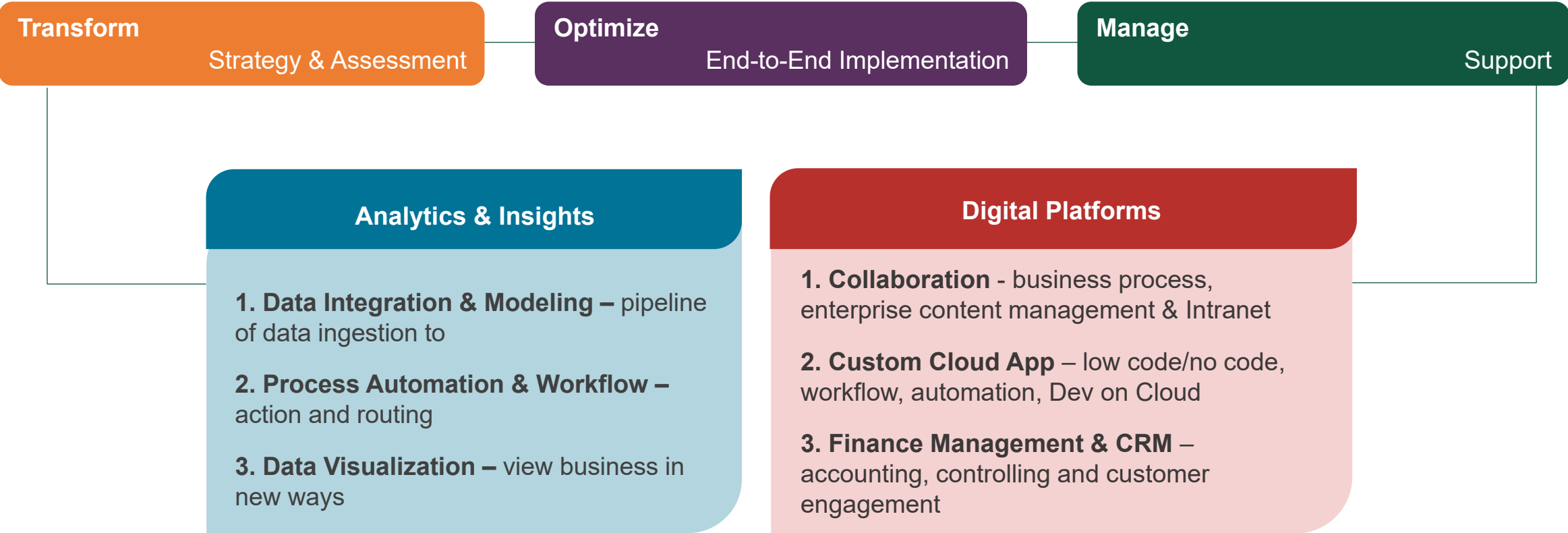
SEPTEMBER 02, 2022



Digital Transformation Journey



Digital Approach



Technology Industry Solutions

Cherry Bekaert

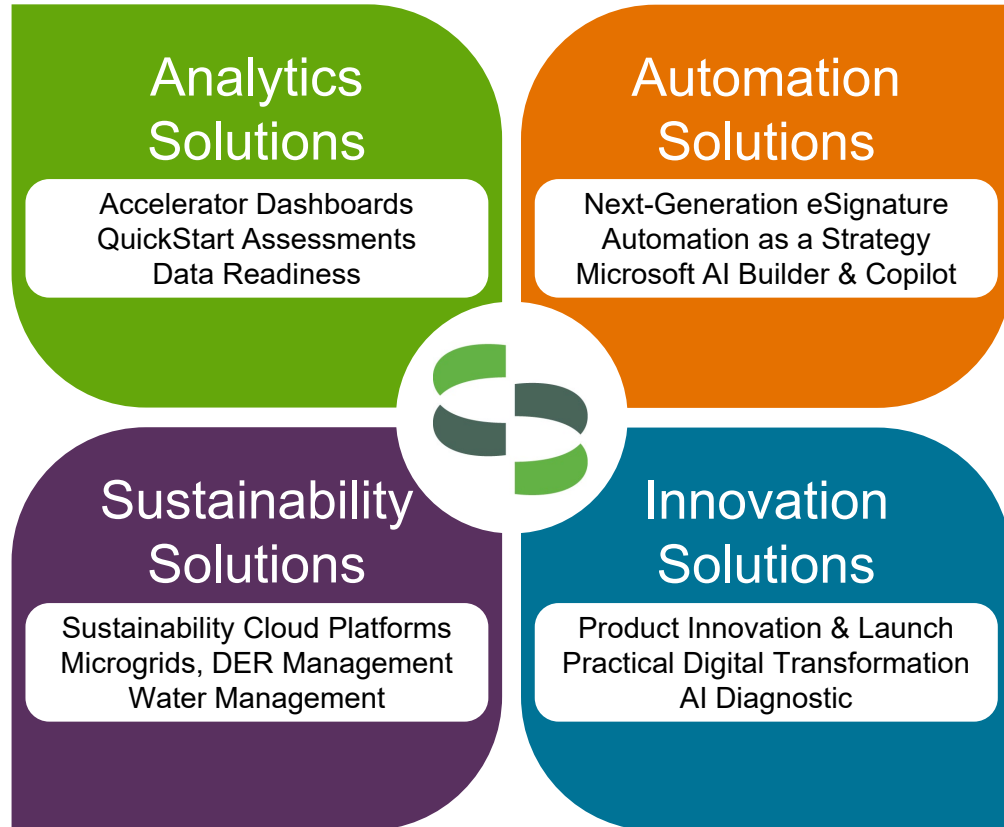
Digital Advisory – Platforms & Solutions

Featured Solutions Tied to Our Offerings

Cherry Bekaert's Digitally-Driven, Industry-Aligned Solutions

Repeatable Industry Solutions Tied to Our Core Offerings

Financial Services | Industrial & Consumer Goods | Private Equity | Professional Services | Government & NFP | Real Estate, Construction, and Hospitality | Technology | Life Sciences



Strategy → Transform → Optimize → Manage



Cherry Bekaert's *Industry Solutions* reflect the expertise of our people, the capabilities of our alliance partners and – most importantly – the needs of our clients.

They are repeatable – essentially *packaged solutions* that draw from the wide range of capabilities, expertise, and core offerings from Cherry Bekaert Advisory LLC.

Our focus is on **delivering value quickly** and enabling capabilities that are immediately useful and extendible.

You can expect **outcomes** ranging from better customer and employee experiences, to being more data-driven, to taking out cost, driving profitable growth, and furthering your ESG strategy and objectives.



Featured Technology Industry Solutions

Visit cbh.com to learn more about our core offerings



Helping Technology Firms with Growth and Scale



Analytics Accelerators



Data Governance & Readiness



Next-generation Electronic Signature Solutions





Product Innovation, Launch, and Joint Go-to-Market


Helping Technology Firms With Growth and Scale


Cherry Bekaert Offers a Wide Range of Capabilities that Can Help Take Your Company to the Next Level

Product Innovation


 Help Navigate Cloud Marketplaces & Jointly Launch Offerings

 Scope and Establish Alliance Agreement for Joint Go-to-Market


 Security Assessments, Pen. Tests, Readiness, Cyber Compliance, etc.


 Agile Development & Testing + Commercial Readiness Checklist


 Architect & Design New Product, or for Cloud-Native Re-platforming


 Assess Existing Products & Assets or Ideate on New Ones

Product Operations


 Framework for Product Launch Management


 Voice of Customer Processes & Systems

 Augmented or Outsourced IT / Product Services


 Usage & Churn Risk Insights, Best Next Action


Inorganic Growth

 Transaction Advisory Services


 Synergy-accelerated Growth via Product / Market / Client

Enterprise Technology

 CRM Insights, Hygiene, Automations

 Product-to-Enterprise Integrations & Automations

 Customer Service Ops. & Managed Services


 Next-Generation eSig Workflow Solutions


 Software Licensing & Consulting Services

 Enterprise Architecture, Data & Controls Strategy


 Solution Selection, Implementation, ePMO

Cybersecurity

 IT & Cyber Governance, Strategy, Pol. & Proc.


 Risk & Vulnerability, Pen. Testing / Ethical Hacking


 Readiness Assessment & Remediation Services

 System & Org. Controls (SOC), Attest. Services

Strategic Tax

 R&D Tax Credits

 Energy Tax Credits & Incentives

 SALT, Intn'l. Tax, Methods, and More



Analytics Solutions

Industry Experience | Analytics & Tooling | Data Governance Experience | Solutions & Adoption Methods

Be More Data-Driven...

Cherry Bekaert has Deployed 1,000s of Data Analytics Dashboards, Reports, and Automations for 100s of our Clients.

We've Developed Standardized, Rapid Deployment Methodologies as a Result – Addressing Your Needs From Front-end Analytics Consumption to Back-end Data Strategy, Governance – Including Compliance.

Our Services Help Make Our Clients More Data-driven for Better Decision-making.

Accelerator Dashboards Across Industries – Including...

- Industrial Manufacturing & Consumer Products
- Professional Services – Including Legal
- Financial Services
- Healthcare
- Technology

Need Insights Quickly? Don't Start From a Standstill...

Accelerator Dashboards

Accelerate Deployment of Useful Dashboards & Report via Our Rapid Deployment Methodology

Est. 3-5 Week Analytics Accelerator Launch



Confirm Dashboard Requirements



Data Supply Chain (Sources, ETL, DWH, BI)



Secure, Launch, User Training

Outcomes: Dashboards Up & Running Quickly – Enabling Better Decision-making & Forecasts

...and Across Enterprise Functional Areas – Including...

- Inventory Management
- Sales
- Marketing
- Practice / Product Performance
- Customer Service

Unsure Where to Begin? Let's Confirm Where to Start...

QuickStart Assessment

Collaborate with Stakeholders, Align on Use Cases, Business Impact, and Change Implications

Est. 2-Week Analytics QuickStart Assessment



Workshop: Insights Needs & Value Casing



Systems & Data Assessment



Recommendations: Launch Plan, Governance Impacts

Outcomes: Actionable Roadmap, Quick Wins, Industry + Analytics + Business Impact Experience



Shannon Merritt

Senior Manager

Digital Platforms & Analytics

shannon.merritt@cbh.com



Featured Technology Industry Solutions



Analytics Accelerators



Shannon Merritt

Senior Manager

Digital Platforms & Analytics

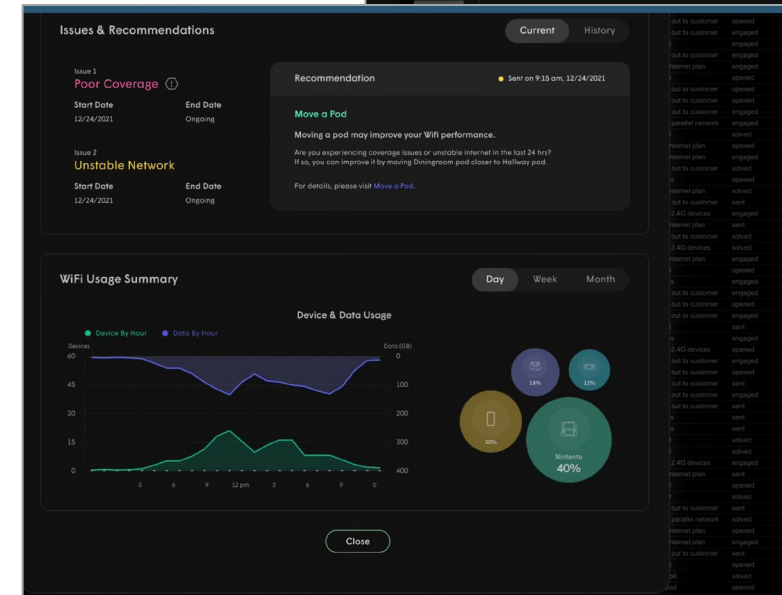
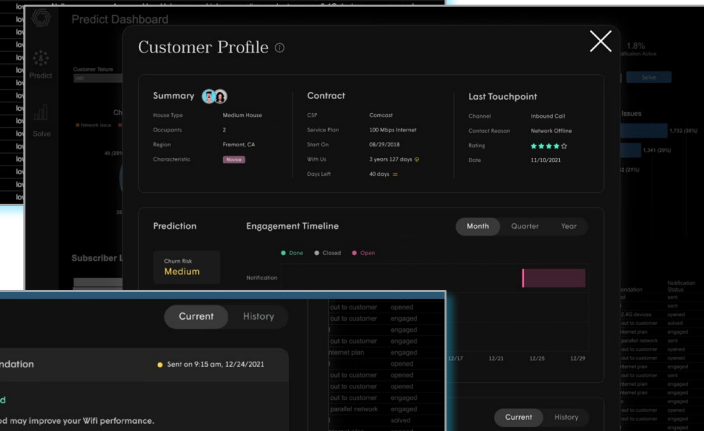
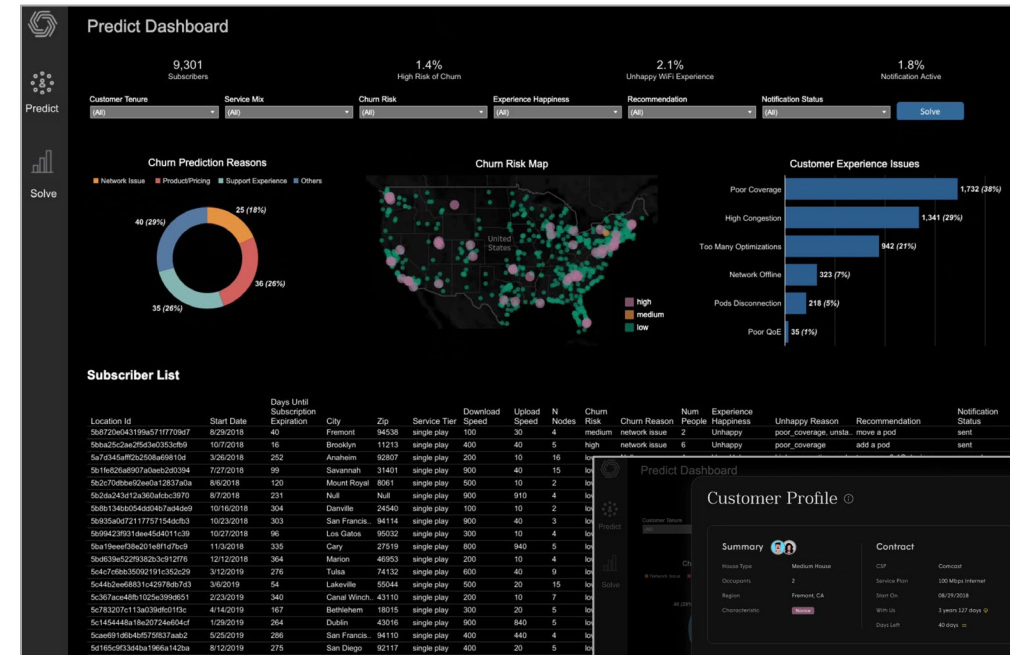
shannon.merritt@cbh.com

- Accelerator Methodology Shortens Time-to-Launch
- QuickStart Assessment to Identify and Prioritize Top Use Cases
- Dashboards for Marketing, Product Teams, Sales, Service (and more) including...
 - ▷ Know Your Customer
 - ▷ Optimize Operations
 - ▷ Usage Tracking & Cohort Best Next Actions
- Data Readiness, Governance, and More



Demo-ready Accelerator Technology Industry

- ▶ Analytics on customer behaviors to identify cohorts posing churn risk
- ▶ Drill down from population sizes on a map to individual profiles
- ▶ Show root causes(s) of heightened churn risk and product / service usage details
- ▶ Best Next Action to mitigate churn risk (dynamic call handling scripts, offers, etc.)
- ▶ Utility in Call Center Operations, segmentation, campaign planning and more



There's More to Being Data-Driven Than Having Beautiful Dashboards and Informatics – and Cherry Bekaert Can Help

Data Readiness

A key feature of our accelerator approach is to quickly enable the insights you need for decision-making. But during an engagement we also come to understand information about your applications, processes, data (generated and consumed), and your governance and data hygiene capabilities.

Technology Considerations

- ▶ Integration
- ▶ Transformation
- ▶ Presentation
- ▶ Automation
- ▶ Storage
- ▶ Cloud

Governance Considerations

- ▶ Application Owners
- ▶ Process Owners
- ▶ Data Retention
- ▶ Data Hygiene
- ▶ Data Security
- ▶ Data Owners

Data Readiness

Strengthen Your Enterprise Data Management Capabilities from a Governance & Ops Perspective

Est. 3-5 Week Data Readiness Assessment



Data Readiness for Reporting Purposes



Data-as-an-Asset: Management Maturity



Managing Digitization & Data Explosion

Outcomes: Trusted Data and Better Forecasts | Plans for Data Structure, Integrations, Analytics

[Read more here about How Cherry Bekaert can Help You Build an Enterprise Data Strategy Framework](#)



Mike McDonald

Senior Manager
Digital Platforms & Analytics
mike.mcdonald@cbh.com



Shannon Merritt

Senior Manager
Digital Platforms & Analytics
shannon.merritt@cbh.com



Featured Technology Industry Solutions



Data Governance / Data Readiness



Shannon Merritt

Senior Manager

Digital Platforms & Analytics

shannon.merritt@cbh.com

 Power BI

 + a b | e a u

- Assess your current strategy and model – including
 - ▷ Technology: Integrations, Transformation, Presentation, Automation, Storage, Cloud
 - ▷ Governance: Application Owners, Process Owners, Data Retention, Data Hygiene, Data Security, Data Owners
- We also have a framework for evaluating data-driven processes as being well qualified for RPA enhancements or employing AI
 - ▷ Kill two birds with one stone: governance recommendations, and automation & AI opportunities
- The duration of our data governance / data readiness assessment can vary and depends on the number of systems involved, the size of your team, and the maturity of your environment.
- Following an assessment, we will provide proscriptive directives around
 - ▷ Gathering business requirements, data requirements, reporting & dashboard requirements, data dictionaries, and issue tracking & remediation for your team



Next-Generation Electronic Signatures

Verdocs enables the first fully embeddable eSignature experience within Microsoft's Commercial Cloud



Microsoft Power Platform

Build customer eSignature-enabled Power Apps and configure simple or complex workflows with Verdocs' Power Automate connectors



Microsoft Dynamics 365

Integrate Verdocs seamless within any Dynamics 365 Business Central application



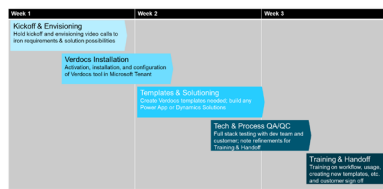
Microsoft Teams App

Control the eSigning lifecycle (build, send and manage) all within the Verdocs Teams App



Cherry Bekaert's Value-Add Includes...

Rapid & Robust Est.
3-Week Deployment
Methodology



Related Services Include

- Solution Managed Services
- Adoption & Change Management
- AI Enhanced Workflows
- Process, Data, Application Governance
- Cloud Strategy & Migration

Industry-specific Solutions

- Industrial Manufacturing
- Professional Services
- Financial Services
- Consumer Goods
- Healthcare
- Technology
- Legal



Trace Armstrong
*Verdocs eSignature
Solutions Leader*
trace.armstrong@cbh.com



Featured Technology Industry Solutions



Next-Generation Electronic Signature Platform & Solutions

- Lower TCO, Developer Friendly, Automation Friendly
- Featured eSignature Use Cases
 - ▷ Natively-integrated In-app/platform Signature Workflows
 - ▷ License/Subscription Agreements & Renewals
 - ▷ Human Capital Management (Hire-to-Retire, Temps, Consultants)
- Save Money on Every eSig Use Case
- Enable Workflows, Automations, and Insights Quickly



Trace Armstrong
Senior Manager
eSig Solutions Lead
trace.armstrong@cbh.com



Featured Technology Industry Solutions



Product Innovation & Go-to-Market



Nate Regimbal

Managing Director

New Practices & Solutions

nate.regimbal@cbh.com

- Accelerate Product / Feature Launch
 - ▷ Architecture & Design, Cloud, Big Data & Advanced Analytics, Tenancy Strategy, Support Model
 - ▷ UI Design & Development, Development Methodology
- Cloud-native Application Launch + Marketplace Navigation Support
 - ▷ Full Software Development Life Cycle
 - ▷ Harmonize Commercial, Technological, and Legal Matters
- Framework to Scope, Manage Solution and Launch Operations
- Go to Market With Cherry Bekaert – Including Into Our Industries



Product Innovation and Joint Go to Market

Partner with Cherry Bekaert for Productization and Distribution

Productization is a core theme within digital transformation and is something we are deeply involved in with our clients.

We help clients launch their products – whether SaaS or in-tenant applications – on major marketplaces. In multiple cases our team plays product management, design, development, and fractional CTO and CISO roles.

Some of our clients are adopting product-based business models. Others work with us to help them navigate the sophistication within leading cloud platforms – including technology-focused matters (like putting your “app” in stores or catalogs, or configuring pricing, billing, and entitlement mechanisms), to marketing positioning and optimized SEO, to tax & finance settings for revenue operations.

Cherry Bekaert further differentiates by partnering with our customers in models that include offering deployment services, support services, or bringing your solutions to market to our client base – which numbers in the tens of thousands and covers multiple industry verticals.



We can be *Your Guide Forward* starting from the ground up or at any step along the way



Why Cherry Bekaert



Proactive Teams bringing forward looking professionals



Mutually Beneficial Relationships you can trust



One-Firm Solutions to optimize overall results



Industry Advisors providing value to Clancy & Theys



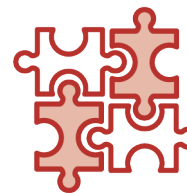
Seamless Transition leveraging technology and a proven process



Fresh ideas, new perspectives looking beyond traditional services



Seek to Understand – making your success our mission



Make the complex less intimidating



Digital for Industry Growth

- Cybersecurity & Privacy
- Data Processing & Analysis
- Enterprise Regulations & Compliance
- Omnichannel Platforms/Collaboration
- Delivery Systems Transformation
- Interoperability/Consumer Data Access
- Consumer Experience
- Operational Excellence

