

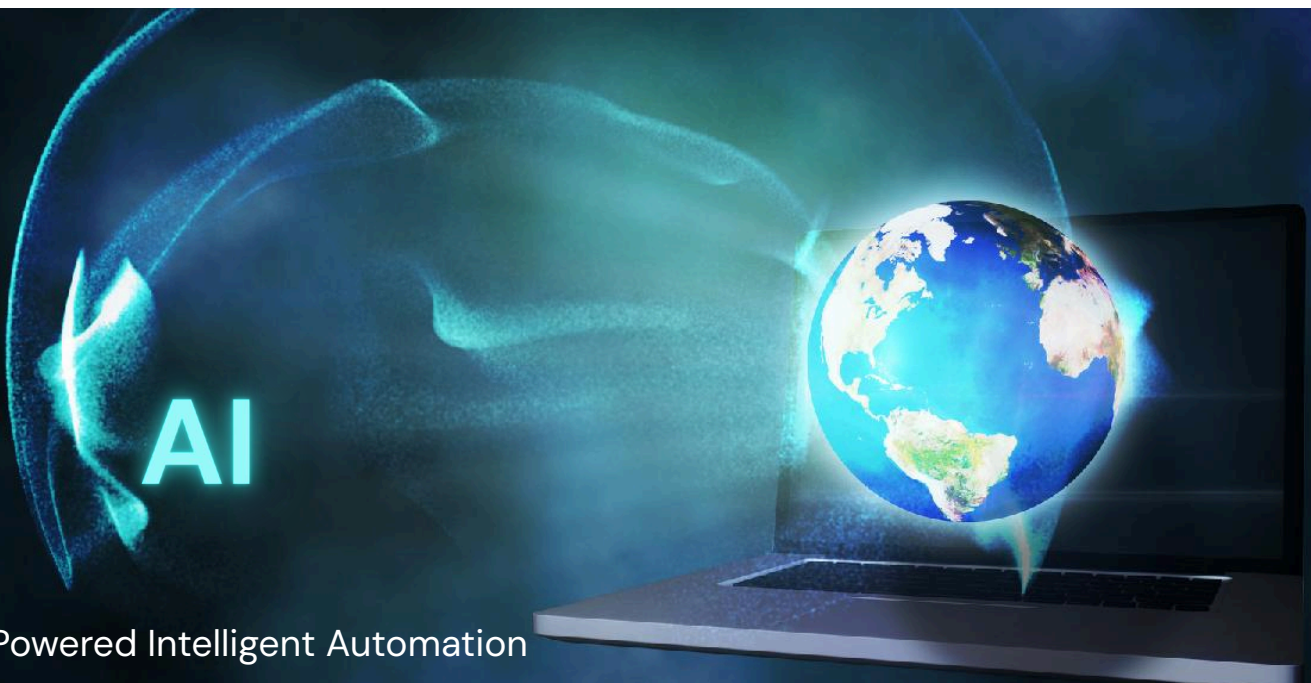


# The Top 3 Business Processes You Can Automate Today

Start leveraging AI now to **save up to 70%** in operational costs with AI-Powered Intelligent Automation built for your workflows

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## Introduction

### Doing More With the Team You Already Have

Most teams today are juggling too much.

Between disconnected systems, manual workflows, and mounting deadlines, employees are spending a surprising amount of their time on mundane, repetitive tasks. Some common examples include manual data entry, updating spreadsheets, generating recurring reports, or chasing down approvals just to keep things moving.

All of that manual work is tedious. It's error-prone. And, it's expensive not just in labor costs, but in missed opportunities, inevitable human error, and employee burnout.

That's where AI-Powered Intelligent Automation comes in.



Whether you're a five-person operation or a 500-person enterprise, Intelligent Automation isn't about replacing your people; it's about enabling them to focus on what they do best. By taking repetitive tasks off their plate, automation empowers your team to operate more efficiently, contribute at a higher level, and stay engaged in work that actually moves the needle.

In this guide, you'll find everyday business processes that are perfect candidates for Intelligent Automation from onboarding and invoicing to reporting and task handoffs. These are common workflows that exist across departments and industries, and odds are, your team is spending an unnecessary amount of time on at least a few of them right now.

We've also included a self-assessment worksheet to help you quickly identify where your organization is losing time and where you stand to gain the most from automation.

By the end, you'll have a clear picture of how automation can reduce operational drag, improve team output, and help you get more value out of the people you already have without hiring more or burning out the ones you've got.

**Let's dive in.**

## Start Here

# Core Processes Almost Every Business Can Automate

## 1. Data Entry & Record Updating

Manually entering and updating data is one of the most common and costly productivity drains in any organization. Whether it's copying contact info into a CRM, logging call notes, or updating spreadsheets with transaction records, these tasks are often time-sensitive, repetitive, and highly prone to human error.

With AI-Powered Intelligent Automation, you can get custom-built Digital Assistants that can extract data from emails, forms, systems/programs, or PDFs and automatically input it into the correct fields across your technology stack. This eliminates the tedious copy-paste work and ensures information is always up-to-date, accurate, and available in real time.

The value in automating this process is massive. First, it eliminates the risk of errors that lead to reporting mistakes, missed follow-ups, or compliance issues.



Second, it gives your team hours back each week to focus on work that actually moves the business forward, like solving problems or delivering value to clients. Plus, team engagement will improve with this tedious, time-consuming task off their (likely already full) plates.



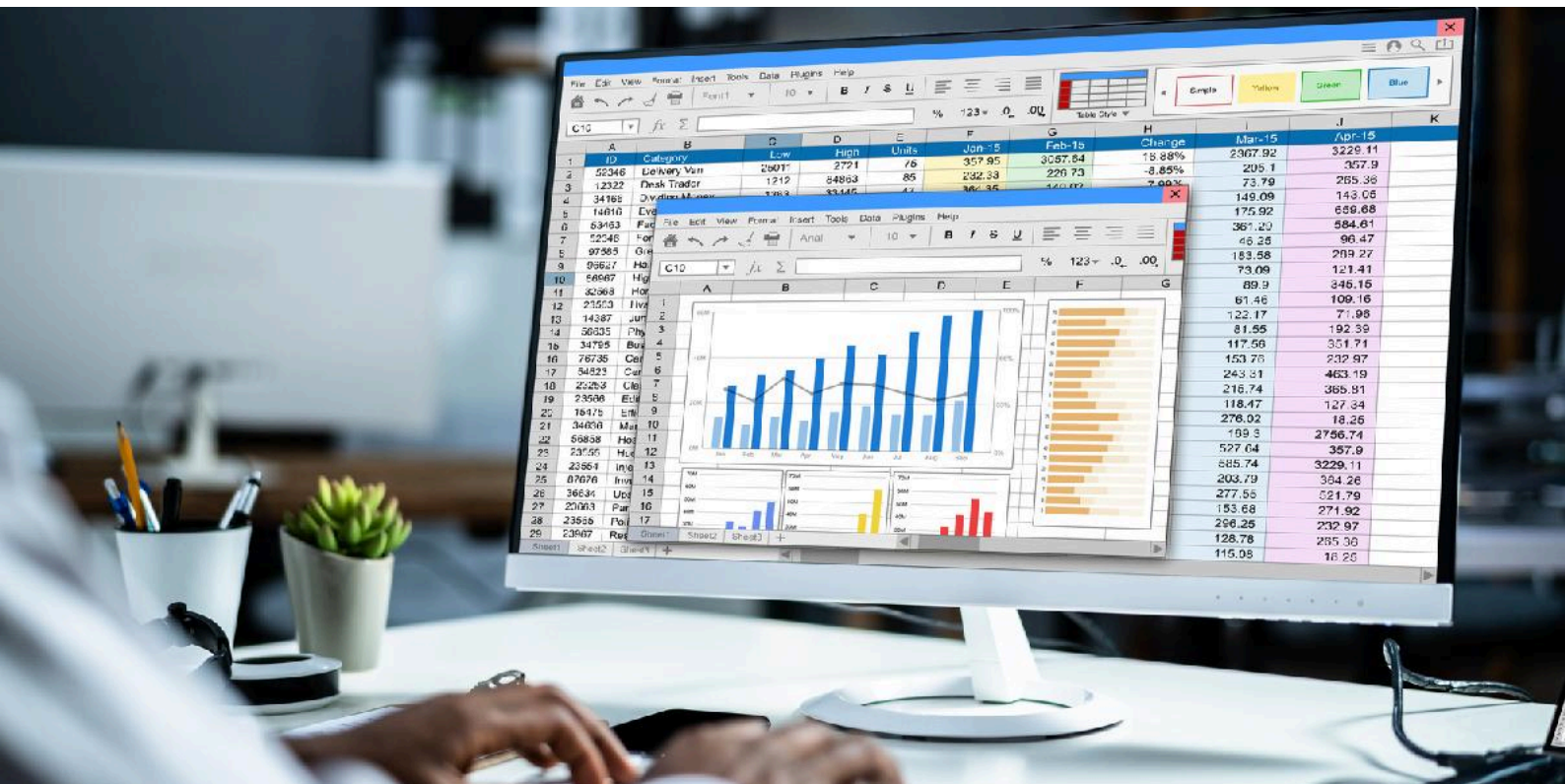
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## 2. Accounts Payable / Invoice Processing

Invoice processing touches nearly every department, from finance and operations to procurement and client services. And yet, many businesses still rely on manual steps: scanning PDFs, extracting totals, checking for approval, and entering details into accounting software.

With AI-Powered Intelligent Automation, this workflow becomes streamlined and hands-off. Custom-built Digital Assistants that are tailored to your current systems and workflow can handle the process from start to finish, with a human-in-the-loop to confirm and validate the task at any stage.



A Digital Assistant can monitor inboxes for incoming invoices, extract the relevant information using intelligent document processing, validate entries against purchase orders, route for approval, and push the data into your finance system.

Automating invoice processing delivers fast ROI. It reduces late payments and errors, cuts down on approval delays, and improves your ability to close the books quickly each month. Plus, it significantly lowers the risk of duplicate payments or compliance issues, which can be costly.

Freeing up your finance team from these routine tasks lets them focus on higher-value initiatives, like cash flow strategy, vendor relationships, and audit readiness.



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### 3. Recurring Report Generation

Most teams need to create the same reports on a weekly or monthly basis pulling data from multiple sources, reformatting spreadsheets, updating charts, and distributing decks or dashboards to leadership. It's a time sink that often falls on high-value team members who would prefer to be focused on analysis, not assembly.



Automating recurring report generation means your reports build themselves. With Intelligent Automation, a custom-built Digital Assistant can extract real-time data from your CRM, accounting software, project management tools, or spreadsheets, then populate pre-set templates or dashboards. Reports can be scheduled and validated by a designated human-in-the-loop before getting emailed to the right stakeholders.

The result? Consistent, accurate reporting that saves hours each cycle and dramatically reduces human error.

It also helps leadership get the data they need faster, improving decision-making across the board. When reporting is automated, your analysts can spend more time on insights rather than on inputs.



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## Industry Spotlights

### Intelligent Automation for Specialized Workflows

Now that we've covered the top three automation opportunities that apply across nearly every business, let's take a closer look at how Intelligent Automation can address more specialized workflows. In the sections below, we spotlight high-impact processes by industry and break down one example from each to show exactly how automation drives value.

#### Accounting

- ✓ Accounts Payable / Invoice Processing
- ✓ Bank Reconciliations
- ✓ Tax Data Collection and Preparation
- ✓ Audit Trail Compilation
- ✓ Payroll Processing
- ✓ Client Onboarding and KYC Verification
- ✓ Compliance and Regulatory Reporting
- ✓ Financial Statement Generation
- ✓ Accounts Receivable Automation
- ✓ Compliance & Audit Logs



#### Breaking It Down: Bank Reconciliations

Bank reconciliation is one of the most tedious and error-prone tasks finance teams handle each month. It requires comparing internal cash ledger entries against external bank statements to identify timing differences, missing transactions, or manual entry mistakes.

For many teams, this means downloading bank statements, opening spreadsheets, scanning line by line, and adjusting balances until things line up, all while under pressure to close the books on time.

With AI-Powered Intelligent Automation, a custom-built Digital Assistant can handle this process from end to end. It can extract transactions from bank statements, match them to internal records, flag discrepancies, and even suggest adjustments like bank fees or interest income. A human-in-the-loop can review and approve flagged items before the reconciliation is finalized and logged.

Automating bank reconciliation reduces the risk of costly errors, speeds up month-end close, and ensures your finance team has accurate, real-time visibility into cash flow without burning hours on manual matching.



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## Industry Spotlights

### Intelligent Automation for Specialized Workflows

#### Manufacturing

- ✓ Purchase Order Processing
- ✓ Invoice Matching & Vendor Payment Automation
- ✓ Inventory Level Monitoring & Reordering
- ✓ Supply Chain Exception Handling
- ✓ Work Order Creation & Routing
- ✓ Logistics / Order Management
- ✓ Production Planning Report Automation
- ✓ Quality Control Data Capture
- ✓ Supplier Management
- ✓ Fleet and Equipment Maintenance Services



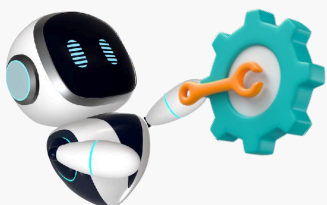
#### Breaking It Down: Invoice Matching & Vendor Payment Automation

In manufacturing, managing vendor invoices is a constant balancing act between supply chain demands and payment accuracy. Procurement teams receive hundreds (if not thousands) of invoices tied to raw materials, components, and services each of which needs to be matched to a purchase order or delivery receipt before payment can be issued.

When done manually, this process is slow, error-prone, and highly dependent on internal coordination. Missed matches can delay production or damage vendor relationships.

With AI-Powered Intelligent Automation, a custom-built Digital Assistant from Valenta can take over this entire workflow. It extracts invoice data from PDFs or portals, cross-references line items with purchase order (PO) and goods received note (GRN) data in your enterprise resource planning system, flags discrepancies for human review, and triggers payment for approved invoices. It can also send confirmation notices to suppliers and maintain full audit logs.

Automating this process speeds up production cycles, prevents overpayments, and improves supplier trust while freeing up your procurement and finance teams for more strategic work.



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## Industry Spotlights

### Intelligent Automation for Specialized Workflows

#### Healthcare

- ✔ Patient Intake & Eligibility Verification
- ✔ Appointment Scheduling & Reminders
- ✔ Claims Submission & Denial Management
- ✔ Medical Coding & Billing Automation
- ✔ Prior Authorization Requests
- ✔ EHR Data Entry & Updates
- ✔ Clinical Data Entry & Reporting
- ✔ Inventory Reordering for Medical Supplies
- ✔ Credentialing and Provider Onboarding
- ✔ Patient Satisfaction Survey Distribution & Reporting

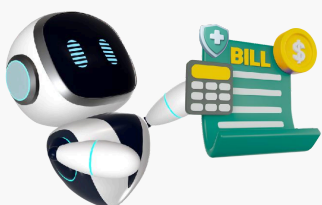


#### Breaking It Down: Medical Coding & Billing Automation

Medical billing and coding is a core part of the healthcare revenue cycle and one of the most time-consuming and error-prone workflows in any practice. It requires reviewing clinical documentation, assigning diagnostic and procedure codes, preparing insurance claims, and following up on denials or missing information. When handled manually, it slows down payments and often leads to costly mistakes.

With AI-Powered Intelligent Automation, a Valenta Digital Assistant can handle this workflow from start to finish. It automatically enters billing details into your practice management system, checks for missing or incorrect information, submits claims through payer portals, and follows up on status updates, all with a human-in-the-loop to validate and approve as needed.

Automating medical billing reduces the burden on your administrative team, improves accuracy, and accelerates insurance reimbursements. Instead of chasing paperwork, your staff can focus on what matters most: supporting patients and ensuring smooth day-to-day operations.



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## Industry Spotlights

### Intelligent Automation for Specialized Workflows

#### Wealth Management

- ✔ Client Risk Profiling & KYC Verification
- ✔ Portfolio Monitoring & Adjustments
- ✔ Trade Execution Workflows
- ✔ Performance & Fee Reporting
- ✔ CRM Data Enrichment and Maintenance
- ✔ New Client Onboarding
- ✔ Account Opening / Custodial Integration
- ✔ Compliance Monitoring & Alerts (AML, SEC)
- ✔ Investment Research & Market Risk Management
- ✔ Client Lifecycle Management

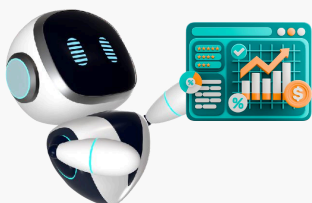


#### Breaking It Down: CRM Data Enrichment and Maintenance

In wealth management, having clean and complete CRM data is essential for building trusting client relationships and efficient advisory workflows. Yet, manually updating contact info, adding firmographics, and tracking changes can quickly become overwhelming for client service teams and advisors alike.

With AI-Powered Intelligent Automation, a Valenta Digital Assistant can manage CRM enrichment and upkeep behind the scenes. It connects to your CRM, identifies incomplete or outdated records, and enhances them using verified third-party sources. Missing fields like email addresses, firm size, or client affiliation are auto-filled, and duplicates are flagged for review. All updates are logged for compliance and quality control.

Automating CRM data enrichment improves advisor efficiency, strengthens segmentation and personalization, and reduces the risk of outreach or compliance mistakes due to stale data. Instead of chasing down data inconsistencies, your team can focus on client strategy and building lasting relationships.



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## Industry Spotlights

### Intelligent Automation for Specialized Workflows

#### Construction

- ✓ Opportunity & Quote Management
- ✓ Vendor / Supplier Onboarding
- ✓ Job Cost Tracking & Variance Reporting
- ✓ Daily Field Reporting Automation
- ✓ Timesheet Collection & Payroll
- ✓ Permit & Inspection Status Alerts
- ✓ Document Control & Versioning
- ✓ Purchase Order and Material Requests
- ✓ Fleet and Equipment Maintenance Services
- ✓ Reporting & Analytics for Field Ops

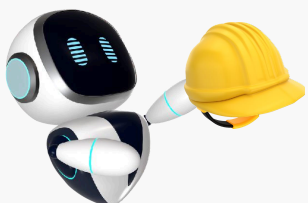


#### Breaking It Down: Opportunity & Quote Management

Winning new projects in construction often comes down to speed, accuracy, and consistency in how you manage bids and proposals. But for many firms, opportunity tracking and quote generation still involve scattered spreadsheets, outdated templates, and time-consuming manual inputs, slowing down response times and increasing the risk of errors.

With AI-Powered Intelligent Automation, a Valenta Digital Assistant can streamline your entire quoting process. It captures incoming bid requests, auto-fills proposal templates using data from past jobs or estimating tools, tracks opportunity status in your CRM or project system, and sends follow-up reminders, all while keeping stakeholders in the loop.

Automating opportunity and quote management helps construction teams respond faster, maintain pricing accuracy, and avoid missed deadlines. It also creates a clear, repeatable workflow that improves visibility into your sales pipeline so you can focus more time on building and less time chasing paperwork.



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## Want Help Identifying What To Automate First?

Book a Free Discovery Call with a local Valenta Managing Partner to discover how to automate today. Our experts will review your current operations and show you exactly where you can **save time and save money.**

**BOOK A FREE DISCOVERY CALL**



We Empower Businesses to  
Save More, Do More, & Stay Ahead  
With AI-Powered Intelligent  
Automation

## Your Intelligent Automation Partner

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