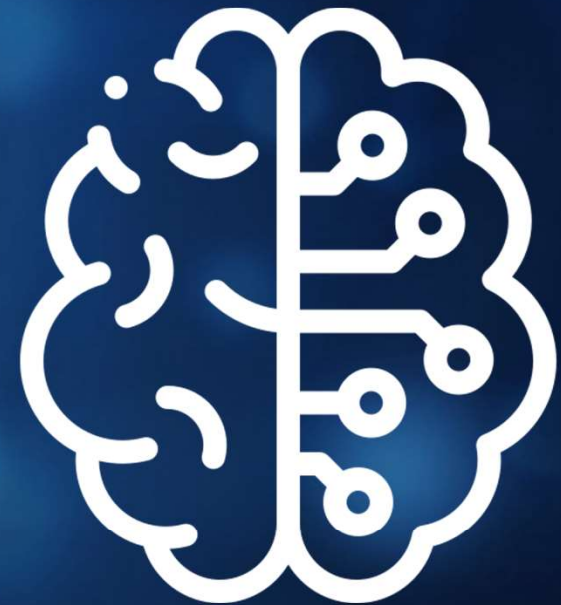




# AI for municipalities

Winning together webinar:  
City of Kelowna, RSM and Microsoft

Oct. 17, 2023



# Agenda



**Introductions**



**Path to enterprise AI – project overview**



**Panel: City of Kelowna and Microsoft**



**Getting started**



**Q&A**



# Today's presenters



**Robbie Beyer**

Director

Data and AI

San Diego, CA, US



**Sawan Dhaliwal**

Director

Digital Strategy

Edmonton, AB, Canada



**Jazz Pabla**

Chief information officer

City of Kelowna

Kelowna, BC, Canada



**Sarah Critchley**

Program Manager, Conversational AI

Microsoft

Vancouver, BC, Canada



# PATH TO ENTERPRISE AI

Project overview

# Path to enterprise AI



## Enterprise AI

An organization planning to implement AI across its entire organization intends to deploy a transformative solution(s), resulting in increased efficiency, improved outcomes, and a more competitive position in its industry.



-  Complete
-  In Progress
-  Future State Roadmap



## Citizen AI (External)

External AI-powered tools or solutions provide a competitive advantage and enhance the citizen experience.



## Proof of Value AI

An organization piloting AI is researching the potential benefits of integrating an intelligent solution into its business processes



## Use Case Specific (Internal)

Using AI as a point solution involves implementing a specific AI-powered tool to address specific business challenges.



### Ethics

- Transparency & Exploitability
- Accountability
- Bias & Integrity



### Organization

- Organizational Design
- Talent Model
- Culture



### Process

- ROI & Funding
- AI Governance
- Delivery



### Technology

- Tools & Architecture
- Security & Continuity
- Deployment Models



### Data

- Enterprise Data Strategy
- Data Management
- Data Governance



# Project objectives

## Opportunity statement

To stay on the leading edge of technology, the City of Kelowna will implement generative AI using Azure OpenAI Services and the broader Microsoft Platform to improve efficiency, decision making, and overall service quality.

## Generative AI: foundational use cases



### Grant management

Team members currently do not have capacity to respond to all potential grant management opportunities.

Leveraging a generative model to develop the content would help the Kelowna team operate more efficiently



### Human resources

The human resources team would be aided by a generative AI solution to help employees navigate HR related documents and policies



### Onboarding / offboarding

Leveraging generative AI capabilities over onboarding / offboarding documents would help alleviate time constraints for Management employees and the Human Resources team



### Permitting applications

Updating and enhancing the current permit application process with intelligent capabilities



# Project objectives

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“This is unreal. We had no idea this is what the City of Kelowna Grant Management app would look like a year ago. There are millions of dollars left on the table at City Hall because we can't respond to enough grants, this will help us address that.”

– Jazz Pabla, IS Director, City of Kelowna

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# Outcomes driven with AI through RSM approach

## Solution results



Higher volume of work output that would have previously required human time



Reduction of manual, redundant tasks



Alignment of business and technical stakeholders in AI deployment



## Business impact\*

**Time Savings:** 10-15+ hours *per week, per team member*



**\$\$ ROI:** reduction in taxpayer burden after a 10-week deployment



**Employee/customer experience:** improved productivity and satisfaction



## Other benefits

- Establishing foundation for enterprise adoption of AI
- Reduced apprehension of AI deployment across business units
- Ability to ideate on new business capabilities not accessible before generative AI capabilities
- Minimal to none ongoing support required by IT – solutions owned and operated by business domain teams

\*Business Impact are examples realized by clients from recent project deployments. Generally, value and ROI derived is use case specific and organization dependent



## Continued investment in AI



Impactful case studies on **homelessness, landfill/waste**, and other social matters



Further opportunities to **alleviate the tax burdens** on citizens



Continue improving both the **citizen and employee experience**





# WINNING TOGETHER PANEL

City of Kelowna, RSM, and Microsoft

# Panel Discussion



**Robbie Beyer - Moderator**

Director

Data and AI

San Diego, CA, US



**Sawan Dhaliwal**

Director

Digital Strategy

Edmonton, AB, Canada



**Jazz Pabla**

Chief information officer

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# GETTING STARTED

# How to get started – summarized offerings



**AI, Digital, and Data Strategy**




**Government, Non-Profit, and Business / Professional Services:** RFP and Grant Application AI Assistant Application



**Government:** Permitting Application Chatbot



**Artificial Intelligence (AI) & Machine Learning (ML) Enablement**



# QUESTIONS AND ANSWERS?



# APPENDIX

# Data and AI capabilities

Data analytics is a discipline focused on extracting insights from data. It comprises the processes, tools and techniques of data analysis and management, including the collection, organization, and storage of data.

Data analytics has become increasingly important in the enterprise as a means for analyzing and shaping business processes and improving decision-making and business results. Our Data Analytics practice markets, sells, designs, implements, and manages the tools that enable our clients to derive insights and democratize their data assets, across enterprise systems.



### DATA TRANSFORMATION TO INSIGHT

<p><b>Data Foundation</b> Integrated Data for Trusted Analytics</p>	<p><b>Reporting &amp; Analytics</b> Evidence-Based Decisions &amp; Insights</p>	<p><b>Information Delivery</b> Secure &amp; Available Data</p>	<p><b>Data Management</b> Ongoing Protection of Vital Data</p>
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## Our services

### Data Integration & Migration (DIMS)

- ERP & System Migration
- Data Quality
- Systems Integration
- Extract Transform Load (ETL)
- Analytics Process Automation
- Alteryx Enablement

### Business Intelligence & Data Strategy

- Business Intelligence
- Data Strategy
- CDO Strategy
- Data Assessments
- Data Warehousing
- Process Mining
- Master Data Management
- Dashboards (advanced)
- Data Governance
- Big Data / IoT

### Advanced Analytics

- Predictive Analytics
- Prescriptive Analytics
- R & Python Scripting
- Machine Learning
- Natural Language Processing
- Artificial Intelligence

## FOCUS INDUSTRIES

Retail	Food & Beverage	Industrials
Government	Distribution	Hospitality
Consumer Products	Healthcare & Pharma	
Professional Services	Financial Services	

## Your results



- Improved analysis and decision-making
- Improves efficiency
- Allows your organization the flexibility to use integrated data for multiple purposes
- Increases productivity by reducing the bottle neck of getting usable data
- Ensuring data democratization while securing data



- It is critical to establish trust and adoption of the business intelligence environment
- Promotes consistent and common understanding of your data
- Increased organizational collaboration and communications
- Enterprise view of the organization
- Empowers end users through self service BI



- Targeted delivery of data, reporting, and analytics capabilities
- Improves ability to deliver results and actionable insights
- Drives consistency in the use of data and significantly reduces many common pain points
- Mobile BI and enhanced information access
- Faster reporting, analysis, and planning
- Accurate data from a single source of truth



**1st**  
First Choice Advisor to the Middle Market

**5th**  
Largest audit, tax and consulting firm in US

**100+**  
Data Analytics Consultants

**5,800+**  
Consulting Clients

### Certifications

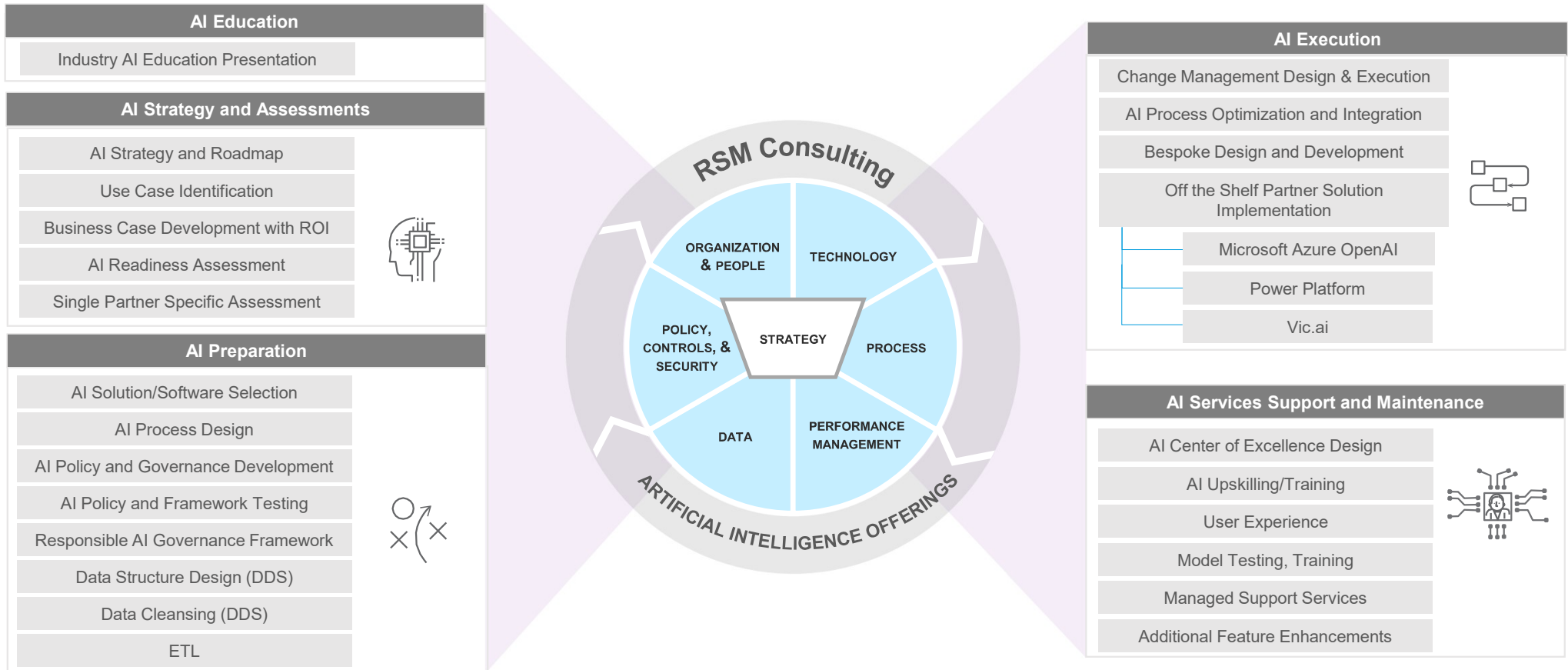
- Adaptive Certified
- Alteryx
- Apple Certified Macintosh Technician
- AWS Certified
- Alexa Skill Builder Certified
- Information Systems Auditor
- Cloud AWS
- CompTIA
- Security+ D365 F&O
- Database Management
- iOS
- ITIL Certified
- Microsoft Certified
- Azure AI Engineer
- Microsoft Certified Azure Data Engineer
- Microsoft Certified
- Azure Fundamentals
- Microsoft T-SQL
- Tableau
- Celonis
- Salesforce Databricks
- Snowflake


### Tools (and more!)



# RSM and AI: service offering details

RSM offers a suite of service offerings designed to effectively assist organizations in unlocking automation opportunities and leveraging AI in the technology space





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