



From Manual to Modern:

*Using AI and DAF365 to Drive
Financial Management Efficiency*

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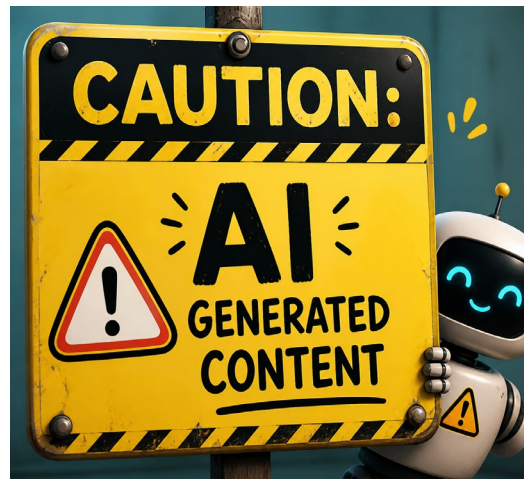
Considerations



Tools



Working Smarter





Framing



- **Financial management is about maximizing impact, not just completing tasks**
- **Many low-value tasks consume disproportionate time**
- **AI and DAF365 can help speed up processes, improve accuracy, and free time for higher-value work**



The Reality of AI



- **AI vs. Automation**
- **AI isn't magic → it only improves human performance when used correctly**
- **Substitution myth: tech doesn't replace humans; it often changes workflows**
- **Need to account for new tasks created by AI (cleanup, validation)**
- **Don't overlook the human aspect**



Appropriate Use



- **Not every task is automation or AI-appropriate**
- **Rules of thumb:**
 - Automate high-volume, repetitive, or rules-based tasks
 - Use AI to augment structured or pattern-recognition tasks
 - Humans should lead context-dependent or judgment-heavy tasks

Automate	Use AI to Augment	Best Performed by Humans
⚙ Data aggregation of multiple sources	🧠 Answering common queries	👤 Strategic budget decisions
⚙ Standardized report generation	🧠 Predictable trend analysis	👤 Interpreting ambiguous data
⚙ Routine data validation/error checking	🧠 Simple anomaly detection	👤 Assessing risk/impact
⚙ Approvals/routing/notifications	🧠 Summarizing structured data	👤 Policy interpretation
⚙ Formatting tables or documents	🧠 Drafting documents	👤 Leadership briefings



DAF365 Tools to Speed Processes



Office Applications

Excel, PowerPoint, OneNote, Word, & Visio



Communication

Outlook, Teams, People, & Bookings



Analytics and Automation

Power BI, Power Apps, Forms, Power Automate & Power Query



File Storage and Content Management

OneDrive & SharePoint



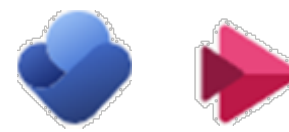
Organization

Calendar, Lists, Planner, & To Do



Additional Tools

Insights & Stream





Zero to Hero in 10 Minutes



- Join the “[IIP: Innovation Improvement Programming](#)” Team and watch the “[Zero to Hero in 10 Minutes](#)” video
 - Use GenAI.mil (or any other model) to generate HTML, PowerShell, VBS, and VBA scripts
 - Observe, orient, decide, act and keep iterating → the basics of process improvement



[IIP: Innovation Improvement Programming](#)



[DAF Process Improvement Professionals](#)



[DAF FM Data Analytics Community](#)



[AF Power BI](#)



[GenAI Collaboration](#)



[AF Power Automate](#)



[AFMC Automation Community](#)



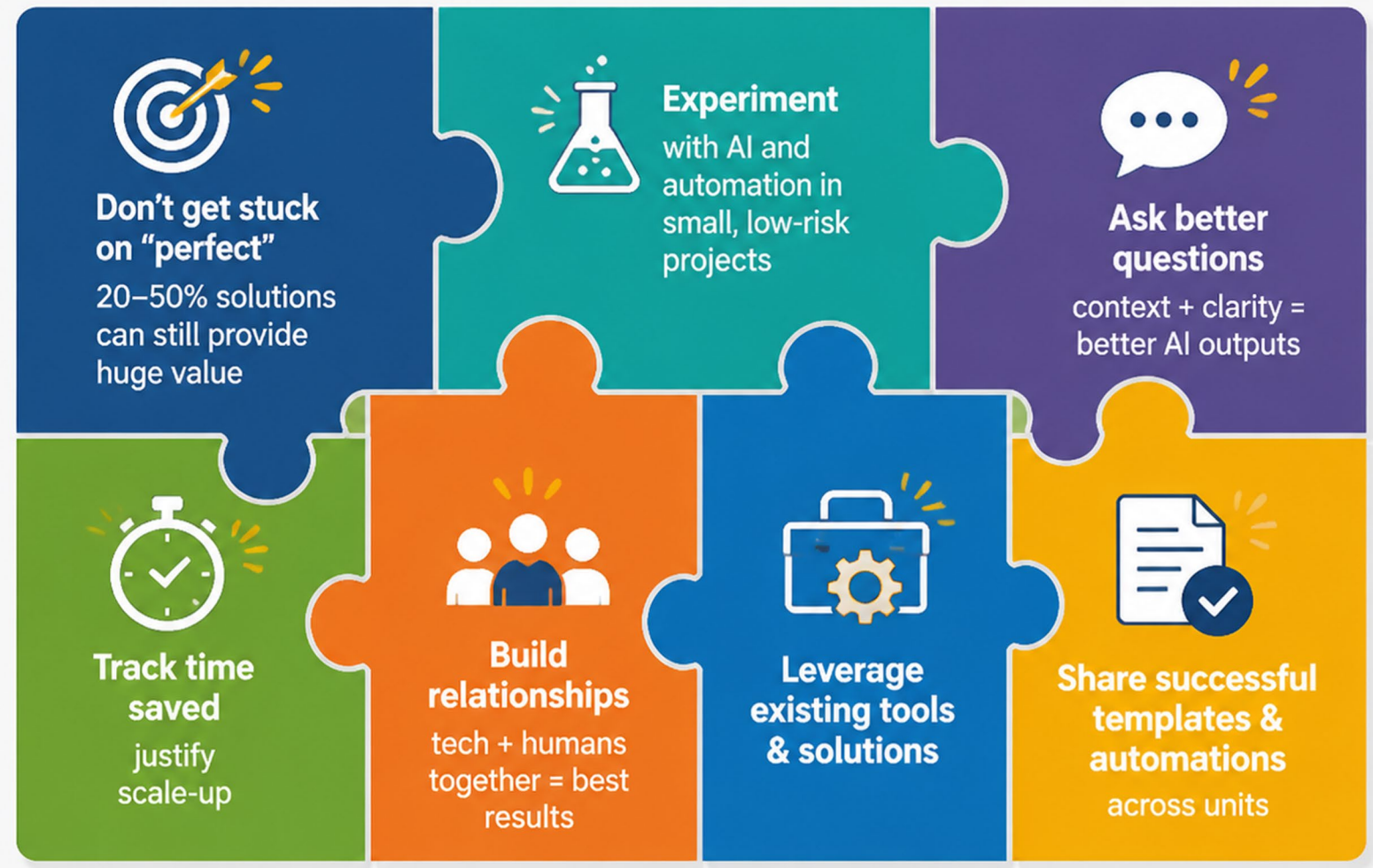
[AF Power Apps](#)



Principles for Smarter Work



Small steps. Smart tools. Big impact.



Together we work smarter. ♥



Key Takeaways

- **AI + DAF365 = smarter, faster, high-value work**
 - Automate vs. AI Augmented vs. Human-led
 - Use AI to teach you to use DAF365 and coding
- **Small improvements scale → big impact on FM processes**
- **Experiment and share across units**



Final Thoughts

Challenge: By the end of next week, pick one thing in your work processes that could be improved and identify the first step to make the improvement



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