

Transform Your Business with Strategic AI

By Citrin Cooperman's Digital Services Practice

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Artificial intelligence (AI) has shifted from a competitive advantage to a fundamental business necessity. According to **Citrin Cooperman's 2025 Private Company Performance Report**, 71% of survey respondents say AI has been the most impactful technology enhancement in the past three years, with 57% having emerging or organizational adoption of AI-powered technologies. However, successful AI adoption requires more than deploying new tools. It demands a thoughtful, strategic approach that aligns with your organization's goals and long-term vision.

Citrin Cooperman bridges cutting-edge **AI solutions** with real-world business impact. Our approach helps companies innovate, automate, and accelerate transformation through a combination of structured assessments, strategic workshops, and tailored AI adoption programs to guide an organization through every stage of AI maturity.

AI Integration in Leading Enterprise Platforms

As AI continues reshaping industries, leading enterprise platforms are embedding intelligent features to enhance efficiency, decision-making, and automation. From financial management to customer engagement and workplace productivity, AI-driven platforms like **NetSuite**, **Salesforce**, **Vena**, and **Microsoft 365** empower businesses to operate smarter and more strategically.

NetSuite: AI-Enhanced Financial and Business Operations

NetSuite integrates AI throughout its cloud-based suite to streamline workflows, suggest actions, and generate valuable business insights. By centralizing data across all business functions, NetSuite provides an ideal foundation for **AI-driven decision-making**, eliminating the challenges of fragmented, siloed systems.

As part of Oracle, NetSuite leverages world-class AI infrastructure and machine learning capabilities to boost both accuracy and performance. With continuous access to high-quality, real-time data, businesses using NetSuite can make smarter decisions faster — gaining a significant edge in a competitive market.

Use Cases for NetSuite AI

- **Human Resources:** NetSuite's **Text Enhance** feature simplifies HR processes by automatically generating job descriptions, defining employee goals, and refining written content for clarity and accuracy. This allows HR teams to shift their focus to higher-value initiatives like talent acquisition, employee engagement, and strategic planning.

- **Warehouse Management:** Order Fulfillment Automation in NetSuite streamlines multi-location fulfillment by using AI to factor in warehouse proximity, priority levels, and user-defined rules. This reduces shipping costs, shortens delivery times, and boosts overall operational efficiency — leading to a better customer experience.

Connect with our NetSuite team to learn how to take advantage of AI features in NetSuite.

Salesforce: AI for Customer Experience and Sales Optimization

Agentforce is Salesforce's AI platform, designed to integrate conversational AI across workflows to help teams resolve issues faster, work more efficiently, and deliver personalized experiences. With predictive and generative AI backed by the secure Einstein Trust Layer, it automates tasks, enhances customer interactions, and improves operational efficiency — without compromising data privacy.

Use Cases for Salesforce AI

- **Customer Engagement:** Agentforce uses Salesforce Einstein's generative AI to deliver personalized, context-aware interactions by connecting external data sources to Salesforce. It powers real-time service recommendations and tailored sales outreach — boosting satisfaction and loyalty while ensuring data security.
- **Marketing:** By leveraging Salesforce Einstein's predictive analytics capabilities, marketing teams identify high potential leads by analyzing historical customer data and recommend personalized outreach strategies and refine messaging. The result is more efficient campaigns, higher conversions, and better return on investment (ROI).

Connect with our Salesforce team to learn how to take advantage of AI features in Salesforce.

Vena: AI-Driven Financial Planning & Analysis (FP&A)

AI plays a crucial role in **financial forecasting with Vena** by automating data gathering and analysis, enabling faster and more accurate predictions. **Vena's AI-powered tools** help financial teams model different scenarios, identify trends, and make informed decisions based on real-time data. This leads to improved forecasting and accuracy, enhanced strategic planning, and **more efficient financial operations**, allowing businesses to stay ahead of market fluctuations and better allocate resources.

Use cases for Vena's AI capabilities

- **Vendor Management** Vena streamlines vendor management by automating performance tracking and risk assessment. **AI-powered insights** assist in evaluating vendor reliability, optimizing contracts, and ensuring cost efficiency—leading to smarter decisions and stronger vendor relationships.
- **Compliance:** AI automates regulations and internal policy tracking by continuously monitoring data for discrepancies, flagging discrepancies and reducing human error. This ensures **accurate reporting** and keeps businesses aligned with evolving standards.

Connect with our Vena team to learn how to take advantage of AI features for FP&A.

Microsoft 365 Copilot: AI-Enabled Workplace Productivity

Microsoft 365 Copilot brings AI directly into familiar tools like Word, Excel, and Outlook to boost workplace productivity. It automates routine tasks, delivers data-driven insights, and generates content — all while adapting to user context and preferences. By supporting smarter decision-making, faster communication, and more efficient workflows, Copilot enhances team collaboration and makes day-to-day work more impactful.

Use Cases for Microsoft 365 Copilot's AI

- **Retail Manufacturing and Distribution:** A U.S.-based apparel manufacturing and distribution client of Citrin Cooperman **used Copilot to improve efficiency across marketing and order processing teams**. In a successful pilot program, Copilot streamlined content creation, campaign targeting, order tracking, and inventory management. It quickly became the company's second-most used app, generating over 30 documents, presentations, and summaries — accelerating adoption and productivity organization-wide.
- **Law:** Law firms use Microsoft 365 Copilot to improve document management and contract analysis. It assists with drafting by suggesting language, highlighting key clauses, and automating routine tasks. Copilot also summarizes lengthy documents and meeting notes, reducing administrative time and allowing legal teams to focus on strategy and client service.

Learn how Citrin Cooperman Digital Services Practice helps organizations successfully launch Copilot with a low-cost, **high-impact blueprint** designed for seamless integration and maximum efficiency.

AI Data Readiness: Considerations

Many businesses eager to leverage AI realize their data isn't properly organized or centralized, limiting the effectiveness of tools like Microsoft 365 Copilot. Data scattered across shared drives or stored in incompatible formats hinders AI performance.

Citrin Cooperman offers AI **data readiness assessments** and helps modernize document management, including migrating data to SharePoint. This foundational step ensures that businesses are positioned to fully leverage AI capabilities and maximize their ROI.

Empower Your AI Journey with Citrin Cooperman

Citrin Cooperman's **Digital Services Practice** is at the forefront of AI strategy and transformation. Beyond the built-in AI features in our supported platforms, we offer customized guidance to help you maximize AI adoption. From AI maturity assessments and data readiness evaluations to tailored strategy development, our services ensure your organization is fully equipped to unlock AI's full potential.

SALESFORCE TEAM



Paul Clayton
pclayton@citrincooperman.com



Patrick Fallon
pfallon@citrincooperman.com



Christopher Hunter
chunter@citrincooperman.com