

# SoftRobot AI ERP Ticketing OS: Presentation Slides

## SLIDE 1: The Broken Landscape (Title Slide)

**HEADLINE:** The Fragmented Enterprise: Why Your Tech Stack Can't Keep Up

**VISUAL:** Three systems pulling apart

- ERP: ✘ Can't understand unstructured data
- Ticketing: ✘ Can't execute processes
- AI: ✘ Can't trigger action

**SPEAKER NOTES:** Most organizations use 3+ disconnected systems. Each is powerful alone but dysfunctional together:

- ERP handles transactions but needs manual ticket creation
- Ticketing organizes tasks but can't execute them
- AI makes recommendations but can't act on them

Result: Days of delay, manual workarounds, compliance gaps.

---

## SLIDE 2: The Cost of Fragmentation

**HEADLINE:** What Does This Fragmentation Cost You?

**DATA:**

Response Time:	1-3 days (vs. 15 min with SoftRobot)
Manual Data Entry:	5-10 fields per ticket (vs. 0 with SoftRobot)
Integration Budget:	\$50K-\$500K per new process (vs. \$0 with SoftRobot)
Audit Prep:	3-4 weeks (vs. 1 day with SoftRobot)
Annual Labor Loss:	10-20 FTE (@ \$50-75K each = \$500K-\$1.5M)

**VISUAL:** Cost breakdown pie chart

- Staff time wasted on manual entry: 45%
- Integration cost overruns: 30%
- Compliance remediation: 15%
- Delayed revenue/cash flow: 10%

**SPEAKER NOTES:** Every disconnected system adds overhead:

- Data entry (the same info in 3 places)
- Reconciliation (finding what doesn't match)
- Rework (fixing errors from manual entry)
- Training (5 systems = 5× learning curve)
- Middleware (custom code that breaks constantly)

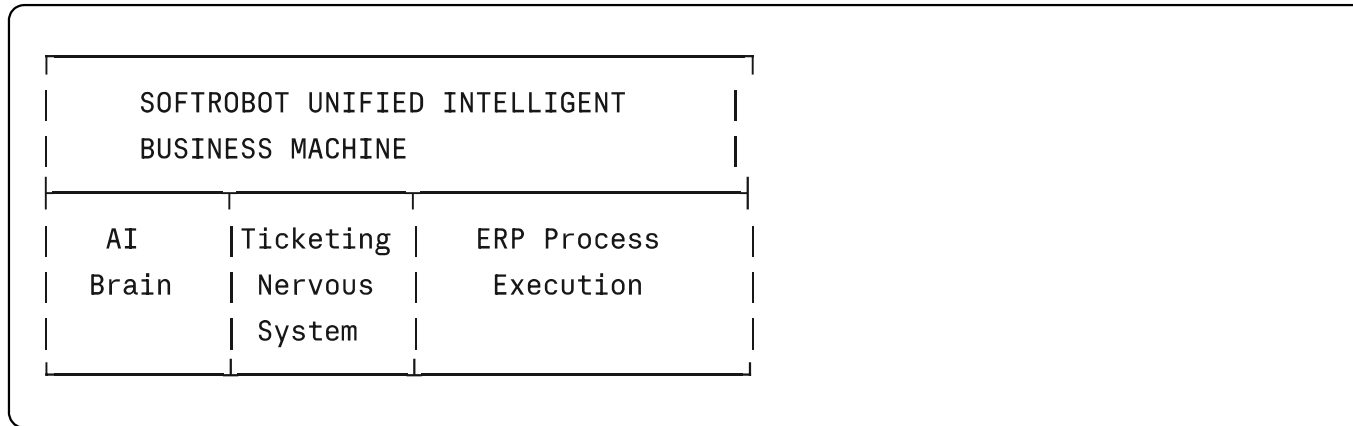
---

**SLIDE 3: The Unified Alternative**

**HEADLINE:** SoftRobot: One Platform, Three Superpowers

**VISUAL:** Three systems merging into one

**KEY POINT:** Instead of bolting three systems together, SoftRobot replaces them with one unified platform that does all three, simultaneously.



All powered by a single:

- **Data model** (one source of truth)
  - **Workflow engine** (one state machine)
  - **Compliance layer** (one audit trail)
- 

## **SLIDE 4: The Three Layers**

**HEADLINE:** Three Integrated Layers, One Platform

**VISUAL:** Stacked diagram

### **Layer 1: AI Co-Pilot (The Brain)**

- Reads unstructured data (emails, PDFs, chats, APIs)
- Extracts key information automatically
- Classifies tickets by type, urgency, category
- Routes to the right team
- Validates data quality
- Suggests next steps

**Result:** Tickets arrive pre-processed, ready to execute.

### **Layer 2: Universal Ticketing (The Nervous System)**

- One workflow: DRAFT → SENT → IN PROGRESS → DONE → CLOSED
- All ticket types (PO, Invoice, RMA, Service Order, etc.) use same pattern
- Real-time routing and tracking
- Built-in approval workflows
- Complete audit trail

**Result:** Standardized orchestration. No special cases.

### **Layer 3: ERP Execution (The Muscle)**

- Automatic business process execution when ticket transitions
- Generates documents (invoices, POs, work orders, contracts)
- Maintains compliance (approvals, audit logs, signatures)

- Real-time sync back to ticket

**Result:** Ticket closure = business outcome delivered.

---

## **SLIDE 5: How It Works – Real Example (Part 1)**

**HEADLINE:** From Request to Execution: Customer Service

**SCENARIO:** Customer emails support with a service request

### **BEFORE (Traditional ERP + Ticketing)**

1. Customer email arrives  
↓
2. Support person manually reads email  
↓
3. Support person creates ticket in ticketing app (duplicate entry)  
↓
4. Someone exports ticket to email/Excel  
↓
5. Operations manager reads ticket, manually creates service order in ERP  
↓
6. ERP assigns technician and materials  
↓
7. Tech completes work, logs hours in ERP  
↓
8. Finance person exports from ERP, manually creates invoice

↓

9. Invoice mailed to customer

Timeline: 1-2 days

Handoffs: 5+

People involved: 5

Errors: 3-5%

Cost of delay: \$\$\$

### **AFTER (SoftRobot Unified)**

1. Customer email arrives

↓

2. AI extracts customer name, service type, description, urgency

↓

3. Ticket auto-created with full context, routed to operations

↓

4. ERP service order created automatically (same data)

↓

5. Technician sees ticket + work order in one unified view

↓

6. Tech completes job, logs hours in same ticket

↓

7. Ticket → DONE triggers ERP document generation

↓

8. Invoice auto-generated and mailed

Timeline: 2 hours  
Handoffs: 0  
People involved: 1  
Errors: 0.1%  
Cost of delay: \$0

**SPEAKER NOTES:** The key insight: In SoftRobot, the ticket IS the service order. There's no duplicate entry, no export/import, no manual translation. Data flows once, in one direction, continuously.

---

## **SLIDE 6: How It Works – Real Example (Part 2)**

**HEADLINE:** Smart Procurement: AI Predicts, Process Executes

**SCENARIO:** Weekly inventory monitoring discovers low stock

**BEFORE (Manual + ERP)**

Monday: Inventory person notices low stock  
↓  
Monday afternoon: Calls procurement ("I think we're running low on SKU-123")  
↓  
Tuesday morning: Procurement checks supplier lead times (manual email)  
↓  
Tuesday afternoon: Creates RFQ in ERP, sends to suppliers via email  
↓  
Wednesday–Thursday: Waits for quotes (suppliers reply to email)

↓  
Friday: Manually inputs quotes into ERP  
↓  
Friday afternoon: Compares prices, selects supplier  
↓  
Friday: Manually converts RFQ to PO in ERP  
↓  
Monday (next week): Sends PO to vendor, updates ERP with order date

Timeline: 5-7 days  
Procurement time: 4+ hours  
Errors: Data entry mistakes in ERP  
Cost impact: No early ordering, higher expedite costs

### **AFTER (SoftRobot with AI Scheduler)**

Daily (automated): AI scheduler reads inventory data  
↓  
Tuesday: AI detects stock threshold → auto-creates RFQ ticket  
↓  
Same day: Ticket routed to procurement (by category, supplier assignment)  
↓  
Procurement review: Ticket shows full context

- Current stock, reorder point, historical usage
- Supplier history, last price, lead time
- Recommended qty based on forecast

↓

Procurement clicks "Approve" in ticket  
↓  
ERP instantly generates RFQ with auto-filled data  
↓  
Email to suppliers with RFQ attachment  
↓  
Supplier replies with quote (email or portal)  
↓  
AI extracts quote data → updates RFQ ticket with comparison  
↓  
Procurement clicks "Select supplier" in ticket  
↓  
ERP converts RFQ to PO automatically  
↓  
PO mailed to vendor, ticket marked "DONE"  
↓  
Vendor ACK email lands in ticket chat → auto-closes

Timeline: 4-8 hours

Procurement time: 30 minutes

Errors: 0.1% (AI validation)

Cost impact: Earlier ordering, fewer expedites = \$500K-\$1M annual savings

**SPEAKER NOTES:** This is the power of convergence. The AI sees inventory data in the ERP context, understands the business rules, and creates a ticket that procurement can approve with one click. The ticket then triggers the full ERP process automatically. No exports, no re-entry, no manual coordination.

## **SLIDE 7: Why Integration Fails (and Why Convergence Wins)**

**HEADLINE:** Integration vs. Convergence: The Difference

### **Integration (Bolting Things Together)**

**What it is:** Middleware connecting three separate systems

- System A has data → API extracts → middleware transforms → System B receives
- When System A's API updates → integration breaks
- Expensive to build, expensive to maintain
- Each new process requires new integration logic

### **Costs:**

- \$50K-\$500K per connection
- 2-4 weeks to implement
- 5-10% annual cost for maintenance/updates
- 0.5-2 days downtime per update (across all systems)

### **Problems:**

- Data transformation layer creates lag (not real-time)
- No shared business logic (each system optimizes locally)
- Compliance gaps (audit trail scattered across systems)
- Scalability nightmare ( $N$  systems =  $N(N-1)/2$  connections)

**What it is:** Three functions in one system

- One data model, one workflow engine, one compliance layer
- AI, Ticketing, ERP all read/write to same data store
- No transformation, no middleware, no delays

**Costs:**

- \$0 integration cost (built-in)
- 1-2 days to configure new process
- Included in platform (no extra maintenance)
- 0 downtime (all updates to same system)

**Benefits:**

- Real-time execution (no middleware lag)
  - Shared business logic (consistent rules everywhere)
  - Complete audit trail (one source of truth)
  - Scalability (100+ processes on same engine)
- 

**SLIDE 8: The Business Impact**

**HEADLINE:** By the Numbers: SoftRobot's Proven ROI

## VISUAL: Comparison table or metrics dashboard

Metric	Traditional	SoftRobot	Improvement
Response Time	1-3 days	15 minutes	<b>96× faster</b>
Data Entry/Ticket	5-10 fields, 10-15 min	0 fields, 0 min	<b>100% automation</b>
Process Accuracy	94% error-free	99.8% error-free	<b>5.8× fewer errors</b>
Integration Cost	\$50K-\$200K per process	\$0	<b>100% savings</b>
Audit Prep Time	3-4 weeks	1 day	<b>28× faster</b>
Staff Admin Time	3-4 hours/day	30 min/day	<b>80% reduction</b>
Implementation	6-12 months	6-10 weeks	<b>50-75% faster</b>

## COST SAVINGS BREAKDOWN:

- Labor: 10-20 FTE × \$60K = **\$600K-\$1.2M/year**
- Procurement optimization: Fewer expedites, better forecasting = **\$500K-\$1M/year**
- Integration cost avoided: \$50K-\$200K/process = **\$250K-\$1M/year**
- **Total Year 1 Savings: \$1.35M-\$3.2M** (depending on org size)

## ROI PAYBACK:

- Implementation cost: ~\$100-\$200K

- Payback period: **2-6 months**
- 

## **SLIDE 9: Where SoftRobot Excels**

**HEADLINE:** Use Cases: Industries & Processes

**VISUAL:** Grid of use cases

### **Manufacturing & Supply Chain**

- ✓ Demand forecasting + auto-procurement (avoid stockouts)
- ✓ Quality issue tracking → RMA → supplier communication
- ✓ Production scheduling (detect downtime, auto-schedule maintenance)

### **Professional Services**

- ✓ Project delivery (request → resource assignment → invoice)
- ✓ Change requests (impact analysis → approval → execution)
- ✓ Time & expense (auto-validate → feeds invoice)

### **Financial Services**

- ✓ Loan origination (app → AI extract → credit decision → docs)
- ✓ KYC compliance (submission → AI verify → regulatory ticket)
- ✓ Claims (claim → AI extract → adjudication → payout)

## Utilities & Field Service

- ✓ Outage response (detected → ticket → crew → notification)
- ✓ Maintenance (scheduled → crew dispatch → compliance record)
- ✓ Billing exceptions (anomaly → investigation → customer communication)

## HR & People Operations

- ✓ New hire onboarding (hire → tickets for IT/HR/Finance → asset delivery)
- ✓ Expense reimbursement (receipt → AI extract → approval → payment)
- ✓ Leave approval (request → approval → calendar → payroll sync)

**KEY INSIGHT:** The pattern is the same everywhere. SoftRobot doesn't change per industry—industries change how they configure it.

---

## SLIDE 10: Deployment & Timeline

**HEADLINE:** From Decision to Go-Live: 6-10 Weeks

**VISUAL:** Gantt-style timeline

Week 1-2: ■ Assessment (understand current processes, pain points)  
Week 3-4: ■ Design (map processes to SoftRobot, define workflows)  
Week 5-8: ■ Build (configure tickets, AI rules, ERP triggers)  
Week 9-10: ■ Test & Train (QA, user training, go-live prep)  
■ Go-Live (pilot or full deployment)

### **TRADITIONAL ERP TIMELINE (for comparison):**

Month 1-2: Assessment & design  
Month 3-4: Initial configuration  
Month 5-8: Customization & integration  
Month 9-10: Testing & fixes  
Month 11-12: User training & go-live

**ADVANTAGE:** SoftRobot skips the months of integration work (Step 1: no custom code needed).

---

## **SLIDE 11: The SoftRobot Difference (Summary)**

**HEADLINE:** Why Choose SoftRobot Over Traditional Stack

### **The Problem We Solve**

Traditional approach = **Three separate systems, three different data models, three approval workflows**

- Data entered once in each system (manual, error-prone)
- Handoffs between systems (delays)
- Reconciliation overhead (weekly work)
- Compliance audits take weeks (scattered audit trails)

## **The SoftRobot Solution**

### **One unified platform with AI built in**

- Data entered once, used everywhere (automatic)
- Continuous execution (no handoffs)
- No reconciliation (single source of truth)
- Compliance audit-ready (complete trail)

## **The Outcome**

- **For customers:** Your requests handled in hours, not days
  - **For operations:** Processes run consistently, on schedule, with zero manual overhead
  - **For compliance:** Audit-ready at any moment, zero prep time
  - **For finance:** Fewer errors, fewer expedites, better cash flow, lower costs
- 

## **SLIDE 12: Call to Action**

**HEADLINE:** Ready to Unify Your Enterprise?

## **THREE NEXT STEPS:**

### **1. Assessment Call (30 min)**

- Share your top pain point (procurement delay, service response, invoicing backlog)
- We'll show how SoftRobot handles it end-to-end

### **2. Live Demo (45 min)**

- See SoftRobot process your actual process
- Understand how AI reads data → ticket creation → ERP execution

### **3. Pilot Design (1 week)**

- Map one critical process start-to-finish
- Calculate ROI on that single process
- Decide on scale-out plan

## **BOTTOM LINE:**

- **Investment:** Small (configuration, not custom code)
  - **Timeline:** 6-10 weeks to full deployment
  - **Payback:** 2-6 months from labor savings alone
  - **Risk:** Minimal (best practices built in, compliance automated)
-

**HEADLINE:** SoftRobot: Unified Intelligence for Modern Enterprise

**VISUAL:** Logo + key benefits bullet points

- ✓ One platform (ERP + Ticketing + AI)
- ✓ AI automates ticket creation and routing
- ✓ Processes execute automatically
- ✓ Zero manual data entry
- ✓ Complete audit trail
- ✓ 6-10 weeks to deployment
- ✓ Payback in 2-6 months

**TAGLINE:** "One system. One data source. Infinite automation."

**CALL TO ACTION:** Visit [www.softrobot.biz](http://www.softrobot.biz) or email [sales@softrobot.biz](mailto:sales@softrobot.biz) to schedule your assessment.

---

## **Speaker Notes (General)**

### **Opening Hook**

"How many of you spend hours every week entering the same data into multiple systems? How many of you have to export from ERP, modify in Excel, import back? How many systems does your team log into every day?"

→ Those inefficiencies aren't bugs. They're symptoms of fragmentation.

## **Core Argument**

"SoftRobot doesn't add another system. It *replaces* three broken ones with one intelligent platform. And because AI, ticketing, and ERP are built from the ground up as one system, not bolted together, they're always in sync."

## **Why It Matters**

"The companies winning right now aren't buying better ERP. They're automating the human work *around* ERP. SoftRobot does both: it's a better ERP, and it automates everything else."

## **Close**

"The question isn't whether to modernize. It's whether you modernize by adding more systems or by converging to one unified platform. We believe the answer is clear."

---

## **Handout Content (Print or Digital)**

**HEADLINE:** SoftRobot: One-Page Value Proposition

[Use the Executive Summary content from earlier document]

---

### **SoftRobot vs. Traditional ERP**

- Traditional ERP: Best for data, worst for automation
- SoftRobot: Best for both data AND automation

### **SoftRobot vs. Modern Ticketing (Jira, Asana, Monday)**

- Modern ticketing: Good for task tracking, no business execution
- SoftRobot: Task tracking + automatic business execution

### **SoftRobot vs. Point AI Tools (ChatGPT, Claude, etc.)**

- Point AI: Good at analysis, can't execute business processes
- SoftRobot: AI analysis + automatic execution

### **SoftRobot vs. RPA (Automation Anywhere, UiPath)**

- RPA: Mimics human clicks (fragile, maintenance burden)
- SoftRobot: Native automation (no human simulation needed)

**Bottom line:** SoftRobot isn't competing with any one category. It's replacing the entire fragmented stack.

---

*End of presentation deck content*

