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Modern Finance:

A Vision & Practical Use
Cases to Lead the Finance
Revolution

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Table of Contents



02/

Executive Summary

03/

Shifting Your Vision to the Future

04/

Traditional Finance Challenges

05/

Modern Finance Opportunities

06/

Envisioning Proactive Finance Function

08/

Four Use Cases for Finance Bottlenecks

12/

Microsoft Technologies

15/

HSO's Approach to Modern Finance

20/

Client Case Study: Financial Advisory Firm

21/

The Future of Finance

22/

The Evolution of Modern Finance

23/

A Collaborative Vision for the Path Forward

Executive Summary

Imagine a finance department not bogged down by spreadsheets, manual reconciliations, or outdated software. It becomes the looking glass of the executive team, providing strategic insights and leveraging data to shape the future of business. This transformation is already underway, driven by game-changing platforms like Microsoft Dynamics 365 Finance & Operations. And yet, many organisations are unsure of how they can break free from the inefficiencies of the past.

This whitepaper is a guide where we explore the evolving role of finance departments,

technological advancements enabling change, and practical use cases that businesses can take to modernise their financial operations. With insights from industry research and real-world case studies, we outline a roadmap to modern finance—a future that turns challenges into opportunities and inefficiencies into competitive advantages.

We know concrete examples are the key to deciding whether a solution is right for you. That's why the centerpiece of this whitepaper is a look at four transformative use cases that bring modern finance to life:



1. Profit and Loss Reports:

See how advanced analytics tools like Fabric integrate near real-time data for better cash flow management, operational foresight, and more informed decision-making.



2. Faster, Smarter Closing:

Discover how AI copilots and automated workflows reduce the stress and time required for financial closings, transforming them into streamlined, proactive processes.



3. GAAP Recalculation and Compliance:

Learn how AI ensures compliance across multiple jurisdictions by adapting financial data to both local and general GAAP standards, eliminating errors and manual effort.



4. Autonomous Finance Agents:

Explore the role of AI-driven assistants that fetch data, provide recommendations, and facilitate seamless collaboration across departments.

With these transformative examples, we showcase how modern finance isn't just an operational upgrade—it's a strategic necessity for long term growth. Let this be your guide to unlocking a smarter and more agile finance department.

Shifting your Vision to the Future

The finance department has always been the organisation's fiscal lifeblood, ensuring every investment is accounted for and every decision is risk conscious. But today, CFOs and finance leaders are expected to go beyond balance sheets. They're now strategic advisors, pivotal to navigating the volatile global market and turning it into opportunities to gain a competitive edge.

A Tale of Two Finance Departments

In one company, finance teams scramble to consolidate data for quarterly closings, working late into the night with manual processes and outdated software. In another, teams use AI Copilots to access near real-time insights, run predictive analytics, and close books in record time. The difference? A commitment to modern finance tools.

This contrast underscores the critical need for modernisation. For businesses stuck in the past, inefficiencies compound, leading to missed opportunities. For those embracing the future, innovation and agility become core strengths. It's a story of transformation—one that begins with reimagining what finance can achieve.



The Changing Role of CFOs

According to Gartner, "Data, metrics, and analytics emerged as the top CFO priority for 2025."¹ CFOs are no longer just risk managers; they're innovators who:



Leverage data:

Modern CFOs use analytics to drive decisions, predict trends, and uncover opportunities.



Collaborate across functions:

Finance leaders are now integral to guiding marketing, operations, and IT strategies.



Drive agility

With the right tools, CFOs pivot quickly in response to changing market conditions.

This evolution is no longer a luxury—it's become an essential step in company growth. Organisations are facing unprecedented challenges, and finance teams must adapt to support dynamic business needs.

The Challenges Facing Traditional Finance

Despite their critical role, many finance departments struggle under the weight of outdated practices and tools. Key challenges include:



Data Overload

The explosion of information means finance teams must sift through massive datasets. Yet, 44% of executives cite poor data quality as the top obstacle to strategic decision-making.²



Manual Processes

Inefficiency reigns in traditional setups. Insightsoftware reports that 75% of finance teams spend six hours weekly recreating reports, amounting to 300 hours lost annually.³



Global Complexity

Multi-GAAP compliance, varying tax regulations, and economic volatility make financial management increasingly difficult.



Limited Technology Integration

Many organisations rely on fragmented systems, leading to duplication, errors, and a lack of actionable insights.

Why it Matters?

These obstacles hinder not only operational efficiency but also the ability of finance teams to act as strategic partners. And the stakes are high: businesses that fail to modernise are falling behind in an era defined by speed and adaptability.

The Opportunities of Modern Finance

By embracing modern finance solutions, organisations can turn these challenges into opportunities. Automation, AI, and advanced analytics offer a path forward, enabling finance departments to:



Streamline Operations

Automated workflows eliminate manual tasks, freeing up time for higher-value activities.



Enhance Data Quality

Unified ERP platforms like Dynamics 365 Finance consolidate information, reducing errors and improving decision-making.



Accelerate Insights

With tools like Copilot for Finance, teams gain real-time access to actionable data, driving faster and more informed decisions.



Improve Compliance

AI-powered solutions ensure seamless adherence to global and local regulatory standards.

Why it Matters?

These benefits aren't theoretical. Companies leveraging modern finance tools report significant gains, from cost savings to enhanced agility. For example, organisations using unified ERP systems see a 70% reduction in accounting rules and up to 50% cost savings on closings.⁴



Envisioning Proactive Finance Function

Modern finance isn't just about adopting new technologies; it's about rethinking the role of finance itself. Consider this shift:



From Reactive to Proactive

Traditional finance focuses on hindsight—analysing past performance. Modern finance emphasises foresight, using predictive analytics to anticipate future trends & guide strategy.



From Back Office to the Strategy Frontline

Once confined to number-crunching, finance teams are now critical players in shaping business direction.



From Isolated Silos to Integrated Systems

Unified platforms enable seamless collaboration between finance and other departments, fostering a holistic approach to decision-making.

These changes redefine what it means to succeed in finance. It's not enough to balance books; today's finance teams must drive value, innovation, and growth.

Building the Vision

To realise the potential of modern finance, organisations must:



Invest in Technology

Prioritise tools that unify data, automate processes, and deliver insights.



Empower Teams

Provide training and support to help finance professionals adapt to new roles and responsibilities.



Foster Collaboration

Break down silos and encourage cross-functional partnerships.

It's not just about technology. It matters how and why you implement it. This is a gargantuan effort that requires tapping into industry and change management expertise.

In the sections that follow, we'll explore the practical applications of this vision, the technologies driving change, and the strategies that make transformation achievable.

Practicum

Four Use Cases that Tackle Major Finance Bottlenecks

A vision is nice: but what can Modern Finance actually do for you? Below we lay out how our technology stack addresses common finance challenges and puts growth-driving insights at your fingertips.



Profit and Loss

The Bedrock of Financial Insight

The Challenge:

Traditional profit-and-loss (P&L) management often relies on disparate systems and manual processes to compile data. Accountants waste hours reconciling figures, which delays reporting and increases the risk of errors. This inefficiency is compounded when organisations operate across multiple entities and geographies.

The Modern Finance Solution:

Imagine a finance department equipped with Dynamics 365 Finance, where P&L data is consolidated automatically in real time. With Fabric Analytics and AI-powered copilots, teams can access comprehensive, up-to-date P&L reports instantly. These tools identify anomalies, highlight trends, and provide actionable recommendations.

Why It Matters

Improved Accuracy

Unified data reduces errors caused by manual consolidation.

Timely Insights

Real-time reporting enables faster decision-making, crucial in volatile markets.

Resource Optimisation

Automation frees up finance teams to focus on strategy rather than data collection.



According to Insightsoftware, organisations using automated systems achieve a 70% reduction in accounting rules and a 100x reduction in manual entries.⁴ These efficiencies empower CFOs to act as strategic leaders, leveraging data to guide organisational growth.

Month and Year End Closing

From Stressful to Seamless

The Challenge:

Closing the books is one of the most time-consuming tasks for finance teams. Traditionally, this involves labor-intensive reconciliations, manual adjustments, and late nights spent identifying discrepancies. In fact, finance departments spend an average of 6.4 days on month-end closings.⁵

The Modern Finance Solution:

With tools like Dynamics 365 Finance and AI Copilot, month- and year-end closings become faster and less stressful. Automated workflows reconcile accounts, flag discrepancies, and generate consolidated reports in hours instead of days. Copilot Agents provide real-time support, fetching data and suggesting corrective actions directly within Microsoft Teams.

Why It Matters

Efficiency Gains

Automation reduces the time needed for closing processes by up to 50%.⁴

Stress Reduction

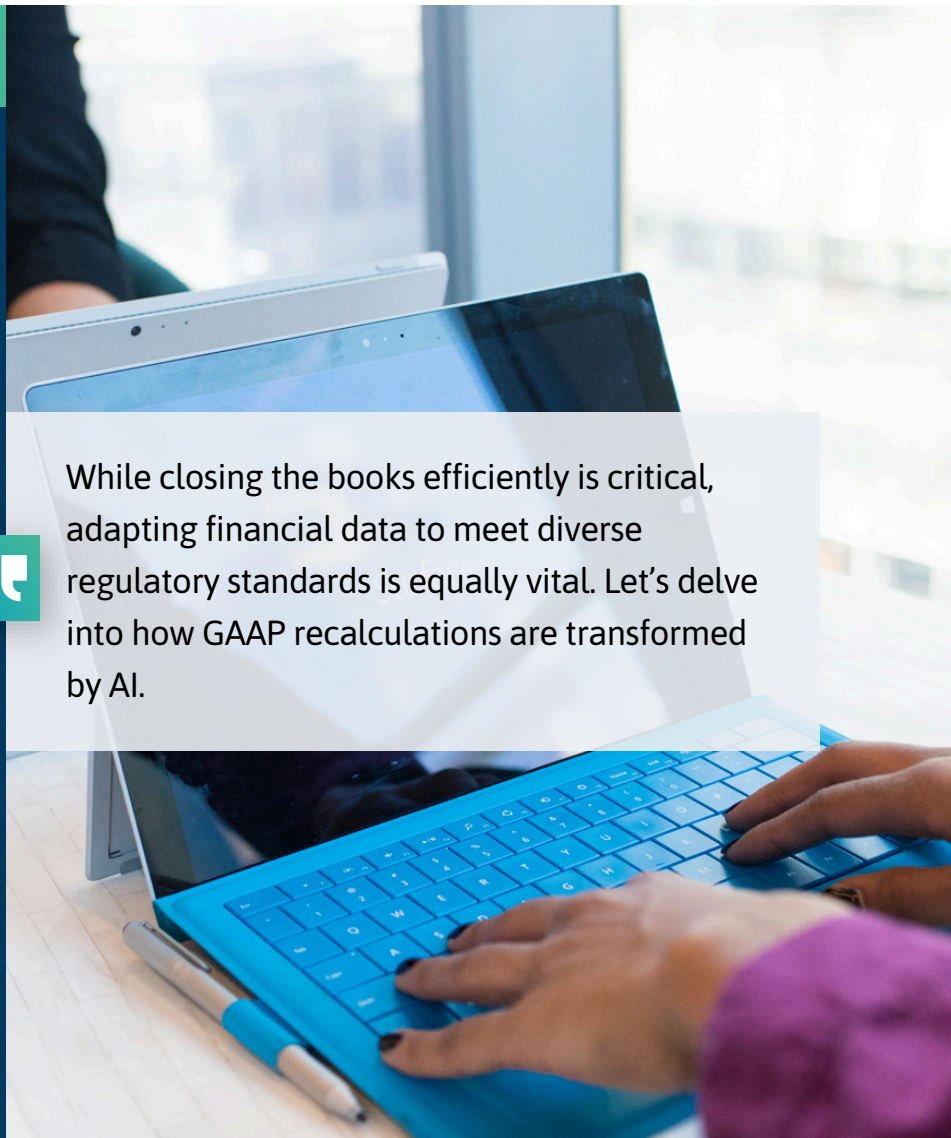
Teams experience less burnout, improving morale and productivity.

Data Integrity

AI ensures consistency and accuracy across financial statements.



While closing the books efficiently is critical, adapting financial data to meet diverse regulatory standards is equally vital. Let's delve into how GAAP recalculations are transformed by AI.



GAAP Recalculations

A Unified Approach to Compliance

The Challenge:

Managing multiple GAAP standards—local, national, and international—can be a logistical nightmare. Finance teams often struggle with manual recalculations to ensure compliance, leading to delays and potential fines for inaccuracies.

The Modern Finance Solution:

AI-powered tools within Dynamics 365 Finance simplify GAAP recalculations by automating adjustments and synchronising data across standards. Aptitude Fynapse ensures that financial statements comply with both general and local GAAPs, while providing audit-ready documentation.

Why It Matters

Regulatory Compliance

Accurate recalculations reduce the risk of non-compliance penalties.

Time Savings

Automated processes cut recalculation time by up to 40%.⁶

Global Integration

Organisations can manage compliance seamlessly across geographies.



For global enterprises, the ability to adapt to multiple standards with minimal manual intervention is a game-changer. Trustworthy AI ensures that recalculations are accurate and auditable, instilling confidence in stakeholders.

The ability to comply with complex regulations is enhanced by intelligent tools. Next, we'll explore how Copilot Agents drive further innovation in finance.

Copilot Agents

Your AI Finance Assistance

The Challenge:

In traditional setups, accessing data from ERP systems often requires lengthy email chains or manual database queries. These delays hinder decision-making and create bottlenecks in workflows.

The Modern Finance Solution:

Copilot Agents completely redefine ERP interactions. Embedded within Dynamics 365 Finance, these AI assistants fetch data, generate reports, and even suggest strategic actions—all through simple queries in Microsoft Teams. Customisable via Copilot Studio, these agents adapt to the unique needs of each organisation.

Why It Matters

Faster Access to Insights

Instant responses to data queries enable real-time decision-making.

Customisable Support

Tailored agents address specific business needs, enhancing usability.

Increased Productivity

Automation eliminates time wasted on repetitive tasks.



A [survey by McKinsey](#) and reporting by [Harvard Business Review](#) highlight that companies leveraging AI assistants see a 40% improvement in business efficiency, a 30% reduction in operational costs,⁷ and accelerated decision-making.⁸ By streamlining workflows and enhancing accessibility, Copilot Agents empower finance teams to focus on high-value activities.

Transition: From profit and loss to AI copilots, these use cases demonstrate the transformative potential of modern finance tools. Next, we'll dive into the technologies that make this transformation possible.

Microsoft Technologies

The Cornerstone of Modern Finance

Modern finance is powered by a sophisticated stack of technologies designed to streamline operations, enhance accuracy, and deliver actionable insights. At the forefront of this transformation are Microsoft technologies, Aptitude Fynapse, and HSO's unique DnA Accelerator.



Dynamics 365 Finance & Operations

Dynamics 365 Finance & Operations (F&O) provides a unified platform for managing financial processes. Unlike traditional ERPs, Dynamics 365 integrates seamlessly with other Microsoft solutions, offering near real-time data visibility and breaking down silos. Its flexibility and scalability make it the platform of choice for growing enterprises.

Key Differentiators

- Comprehensive automation capabilities
- All-in-one analytics that unite data & services, powered by Microsoft Fabric.
- Seamless integration with Office 365 for enhance productivity.



Fabric Data Analytics

Microsoft Fabric is the backbone of data analytics within Dynamics 365. It aggregates data across systems, providing a single source of truth. Fabric's predictive analytics capabilities enable organisations to foresee challenges and seize opportunities.

Key Benefits:

- Unified data visualisation.
- Advanced forecasting tools.
- Reduced dependency on manual data manipulation.

Microsoft Technologies

The Cornerstone of Modern Finance



Copilots for Finance

The Copilot suite—comprising Copilot for Finance, Copilot Agents, and Copilot Studio—represents the next generation of AI-driven tools. While Copilot for Finance handles day-to-day financial tasks, Copilot Agents act as virtual assistants, fetching data and providing insights on demand. Copilot Studio allows for customisation, enabling organisations to tailor AI capabilities to their unique needs.

Why it Stands Out:

- Personalisation and adaptability.
- Natural language interaction for non-technical users.
- Accelerated decision-making through instant insights.



Aptitude Fynapse

Enabling Autonomous Finance

Fynapse is a finance data management platform with advanced accounting and subledger capabilities that transforms Finance into an AI-powered, strategic and trusted value creator.

Fynapse provides a singular and trusted view of all granular business and finance data from any system or source, automation of manual and complex processes, and industry-specific IP to reduce implementation time and costs. This frees finance to deliver results with agility and operate at the speed of business.

Highlights

- Unified, transparent view of granular finance and business data
- Real-time data foundation to power AI
- Integration with existing systems, including ERP, for seamless transition

Microsoft Technologies

The Cornerstone of Modern Finance



HSO's Data, AI & Analytics Suite

Transforming Insights into Action

HSO's Data, AI & Analytics Suite powered by HSO's DnA Accelerator, empowers organisations to harness their data strategically.

By combining technical expertise with deep industry knowledge, HSO's Data, AI & Analytics Suite ensures:

- Rapid deployment of analytics solutions.
- Tailored strategies for data consolidation and reporting.
- Scalable designs to future-proof financial systems.



Why HSO's Approach Matters

With HSO's Data, AI & Analytics Suite, companies don't just adopt technology—they transform their operations. The framework bridges the gap between raw data and actionable insights, delivering tangible ROI and setting the stage for continuous innovation.

HSO's Approach to Modern Finance

A Battle-Tested Roadmap

Transforming finance from a reactive, back-office function into a strategic driver of business success requires more than technology—it demands a clear, methodical approach rooted in expertise and industry knowledge. HSO's proven methodology stands apart by combining deep business analysis, extensive industry experience, and a structured three-step process: **Unlocking Data, Unlocking Digital, and Unlocking AI.** Together, these steps form the backbone of HSO's strategy to empower finance teams, streamline operations, and enable a truly modern finance organisation.



Business Analysis and Industry Experience

Laying the Groundwork

HSO's unique value lies in its ability to tailor solutions to the specific needs of each organisation. With decades of experience across various industries, HSO's consultants understand the nuances of diverse sectors—from manufacturing to retail and beyond. This expertise informs every step of the transformation process, ensuring that the solutions are not just functional but also deeply aligned with the organisation's goals.

Before diving into implementation, HSO conducts an in-depth business analysis. This involves:

- Identifying inefficiencies in existing financial workflows.
- Understanding industry-specific compliance requirements.
- Evaluating the scalability of current systems.
- Benchmarking against industry best practices.

This thorough assessment ensures that every aspect of the transformation is grounded in real-world needs and designed for maximum impact.

Unlocking Data

Building the Foundation for Insight

Data is the lifeblood of modern finance, yet many organisations struggle to harness its full potential. Siloed systems, inconsistent formats, and poor-quality data are common barriers that impede strategic decision-making. The first step in HSO's approach is Unlocking Data, which focuses on breaking down these barriers and creating a unified, reliable source of truth.

The Challenges of Siloed Data

Traditional finance systems often operate in isolation, with ERP systems disconnected from reporting tools, CRM platforms, and other business-critical applications. This fragmentation leads to:



Redundant Data Entry.



Inaccurate or outdated reports.



Lengthy delays in accessing critical insights.

The HSO Solution: Unified Data Platforms

HSO leverages technologies like Microsoft Fabric to integrate disparate data sources into a single, cohesive platform. This ensures that all financial data—whether from sales, operations, or supply chain—is accessible in real-time. The benefits are profound.

Benefits

Enhanced Accuracy

Unified data eliminates inconsistencies and reduces errors.

Faster Reporting

Real-time access accelerates month-end closings and other time-sensitive processes.

Better Decision Making

Reliable data empowers finance teams to identify trends, assess risks, and seize opportunities.

By unlocking data, organisations lay the foundation for digital transformation and open the door to more advanced technologies.

Unlocking Digital

Streamlining Processes and Enhancing Efficiency

The second step, **Unlocking Digital**, focuses on modernising financial workflows through digital tools and automation. While unlocking data provides the raw material, digital transformation refines and applies it, turning information into actionable insights.

Key Capabilities

Automated Reconciliations:

Dynamics 365 handles complex reconciliations with ease, flagging discrepancies and suggesting corrective actions.

AI-Driven Compliance

Tools like Aptitude Fynapse ensure that financial reports meet regulatory standards without manual intervention.

Streamlined Reporting

Pre-built templates and customisable dashboards reduce the time required to generate accurate reports.

By digitising and automating financial workflows, organisations achieve unprecedented levels of efficiency, accuracy, and agility.

Automating Repetitive Tasks

Traditional finance teams spend countless hours on manual processes like reconciliations, report generation, and compliance checks. These tasks, while essential, consume valuable time and resources that could be better spent on strategic initiatives.

HSO addresses this inefficiency with automation tools like Dynamics 365 Finance & Operations. Key capabilities include:

Enhancing Collaboration

Modern finance isn't confined to the accounting department—it intersects with sales, operations, and other business units. Unlocking digital capabilities improves cross-departmental collaboration, enabling:



Real-time sharing of financial insights via Microsoft Teams.



Seamless integration with CRM systems for a holistic view of customer profitability.



Dynamic forecasting that incorporates inputs from multiple stakeholders.




Unlocking AI

Transforming Insight into Foresight

The final step in HSO's approach is Unlocking AI, where organisations move beyond efficiency and begin to leverage artificial intelligence for strategic advantage. AI transforms data from a historical record into a predictive tool, enabling finance teams to anticipate trends, mitigate risks, and drive growth.




Customisations with Copilot Studio

HSO recognises that no two organisations are alike. That's why it emphasises the customisation capabilities of Microsoft's Copilot Studio. By tailoring AI functionalities to specific business needs, organisations can:

-  Automate unique workflows.
-  Develop industry-specific analytics tools.
-  Create personalised dashboards for different user roles.

Scaling AI Adoption

Unlocking AI is not a one-time initiative—it's a journey. HSO helps organisations scale their AI capabilities over time, ensuring that systems remain adaptable as business needs evolve. This includes:

-  Training teams to leverage AI tools effectively.
-  Continuously refining AI models based on new data.
-  Integrating AI into broader enterprise strategies.

AI-Powered Decision Making

AI copilots like those in Microsoft Dynamics 365 revolutionise decision-making by providing instant access to complex insights.

Predictive Analytics

AI identifies patterns in historical data to forecast revenue, expenses, and cash flow with remarkable accuracy.

Scenario Modeling

Finance teams can simulate the impact of different business strategies, from pricing adjustments to market expansions.

Risk Assessment

Machine learning algorithms evaluate financial risks, providing actionable recommendations to mitigate them.

A Holistic Approach to Modern Finance

HSO's three-step process—Unlocking Data, Unlocking Digital, and Unlocking AI—provides a comprehensive roadmap for modern finance transformation. By addressing foundational challenges, streamlining operations, and empowering strategic decision-making, HSO delivers results that go beyond technology.

This approach is not just theoretical; it's backed by real-world success stories. Organisations that partner with HSO experience measurable benefits, including:

50%

reduction in closing times⁴

3x

faster performance compared to legacy systems⁴

100x

reduction in manual data entry⁴

Moreover, HSO's commitment to industry-specific solutions ensures that every transformation is tailored to the unique demands of the business. Whether it's navigating multi-GAAP compliance, optimising P&L management, or leveraging AI for competitive advantage, HSO provides the expertise and tools to make it happen.

As the journey continues, the next section will delve into a real-world example of modern finance transformation, showcasing how these principles come to life in practice.



"Executing international finance implementations is not just a job for HSO—it's who we are."

Georgiana Stuparu
Dynamics 365 Team Lead

Client Case

When a leading provider of employee benefits and HR solutions, set out to modernize its financial operations, it faced a familiar challenge: a rapidly expanding business coupled with legacy systems that struggled to scale. They were looking for more than just incremental improvements, and required a comprehensive solution to unify data, streamline processes, and enable near real-time insights.

With HSO as a partner, this strategic advisory firm adopted Microsoft Dynamics 365 Finance & Operations alongside Power Platform and Aptitude Fynapse. This powerful combination enabled the firm to consolidate data across its growing enterprise, automate routine processes, and empower its finance team with advanced AI-driven analytics.

The transformation journey included:

1. Deploying Dynamics 365 Finance for centralised financial management.
2. Integrating Aptitude Fynapse for multi-GAAP compliance and revenue recognition.
3. Leveraging Power Platform for custom automation and enhanced collaboration.



Time Saved

Streamlined financial reporting reduced closing times, enabling the finance team to focus on strategic initiatives.

Enhanced Scalability

The new system was designed to scale with the firm's rapid growth, ensuring sustainable operations as the business expanded.

Increased Accuracy

Unified data and automated workflows eliminated redundancies and errors, leading to a reduction in manual data entry.

Strategic Insights

Advanced analytics & AI copilots provided real-time insights into financial performance, empowering leaders to make informed decisions quickly.

Cost Savings

Automated processes and optimised resource allocation drove significant operational cost reductions.

The strategic financial advisory firm's transformation highlights the power of combining cutting-edge technology with expert guidance. By aligning tools, processes, and people, HSO helped the organisation achieve a modern finance function that is faster, smarter, and ready for the future.



A Look at the Future of Finance

The journey toward modern finance doesn't end with the implementation of cutting-edge technologies. It's a continuous evolution, driven by the rapid pace of innovation, the increasing availability of data, and the growing complexity of global markets. Organisations that embrace a forward-thinking mindset will find themselves not just adapting to change but leading the charge into a new era of financial excellence.

The Continuous Evolution of Modern Finance

Once the foundational technologies—Dynamics 365, Fabric, Aptitude Fynapse, and AI copilots—are in place, the opportunities for transformation multiply. Businesses will move beyond operational efficiencies to achieve strategic dominance. Predictive analytics, real-time insights, and autonomous financial processes are just the beginning. The next phase involves leveraging these capabilities to gain competitive intelligence and refine decision-making at an unprecedented scale.

Benchmarking Performance in Real-Time

Imagine a CFO comparing their organisation's financial performance not just against internal benchmarks but also against competitors in real-time. This scenario is within reach, thanks to the power of AI copilots. By tapping into publicly available standard reports—such as SEC filings, annual reports, or other regulatory disclosures—Copilot can analyse and compare key performance metrics of competitors.

For example, Copilot might provide insights like:

- "Your revenue growth this quarter is 5% higher than the average of your top three competitors."
- "Operating margins are on par with the industry leader but can improve by 2% with better cost management in these specific areas."
- "Competitor X is increasing investment in R&D by 20%, which may signal a shift in market dynamics."

The Role of AI in Shaping Tomorrow

AI's capabilities will only grow stronger, enabling finance teams to:

- Predict market shifts with even greater precision.
- Build resilient strategies that account for a wider range of economic scenarios.
- Provide hyper-personalised insights to stakeholders at all levels of the organisation.

Why This Matters

This kind of benchmarking goes beyond traditional internal KPIs. It equips leaders with a comprehensive understanding of their standing within the market, enabling them to:

Identify Gaps in performance and address them proactively

Validate strategic initiatives by aligning them with industry trends

Discover new opportunities for innovation and differentiation

A Finance Department that Anticipates, Not Reacts

The finance department of the future won't just respond to changes in the market—it will anticipate them, and ultimately, even prescribe them. Technologies like Copilot Studio will allow organisations to design custom AI solutions tailored to their unique needs, while advanced integrations with platforms like Microsoft Fabric ensure that data remains a single source of truth.

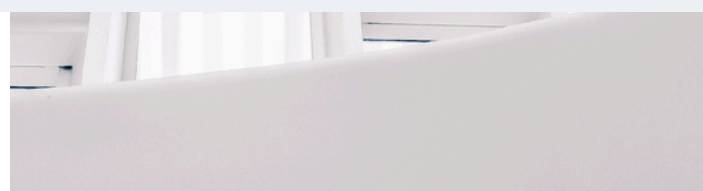
A Collaborative Vision

As companies implement these forward-thinking solutions, the role of finance will continue to expand. Cross-functional collaboration, driven by unified data and intelligent tools, will break down silos between departments. Finance will become the central nervous system of the organisation, connecting insights across sales, operations, and HR to drive unified, strategic action.



The Path Forward

By embracing the tools and strategies outlined in this whitepaper, organisations can position themselves to lead the financial revolution. With HSO, Microsoft, and Aptitude by their side, the journey toward modern finance is not just achievable—it's inevitable. The time to act is now, and the future of finance has never been brighter.



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Next steps



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