

The logo for Deltek ProjectCon 2025 is centered at the top. It consists of the word "Deltek" in a white sans-serif font, followed by a stylized double arrow icon pointing right, and then the words "ProjectCon 2025" in a larger, bold, white sans-serif font. The entire logo is contained within a dark blue rounded rectangle that has a subtle glow effect.

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CPSPON-21

Reports to Recommendations: Embedding AI Dashboards to Transform Data into Actionable Intelligence

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» Agenda

Item	Speaker
Iuvo Systems Introduction	Ed Muldrow
The Evolution of Reports to Recommendations	Louis Delouiser
Why AI Dashboards	Louis Delouiser
Key Features of AI Driven Dashboards	Louis Delouiser
Transforming Data Into Actionable Intelligence	Louis Delouiser
Case Study for Government Contractors	Louis Delouiser
AI Dashboard Implementation Roadmap	Louis Delouiser
Challenges and Best Practices	Louis Delouiser
Next Steps: How Iuvo Systems Can Help Support your AI Driven Dashboards	Louis Delouiser

» Who is Iuvo Systems?



Iuvo Systems is a Premier finance and accounting services firm that provides DCAA compliant outsourced accounting, data analytics & reporting and ERP systems support to government contractors.

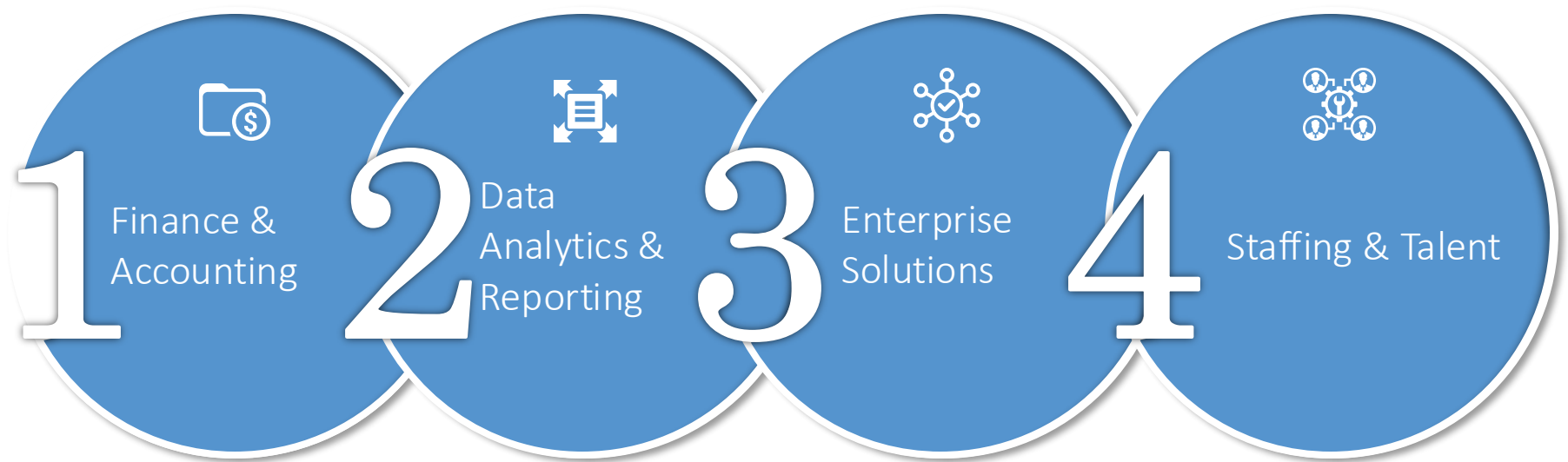
Iuvo means "to help and support" in Latin



Iuvo has worked with over a 1,000 government contractors since 2009.



» What Services does Iuvo offer?



AI Enabled Dashboards

Forecasting the Future



» The Evolution of Reports to Recommendations

Traditional Static Reporting – Looking Back, Not Ahead

DATA
(Raw transactions, timecards, invoices, GL, etc.)



STATIC REPORTS
Excel or PDF tables
Monthly P&L, Job Cost, etc.
Manually refreshed



INSIGHTS
(Retrospective)
'What happena'?
No drill-down or AI

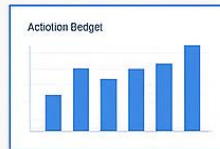
Descriptive
Summarizes what
already happened

Static
Manually generated;
no live data

Retrospective
Backward-looking –
limited decision impact

Static Report

Labor Utilization

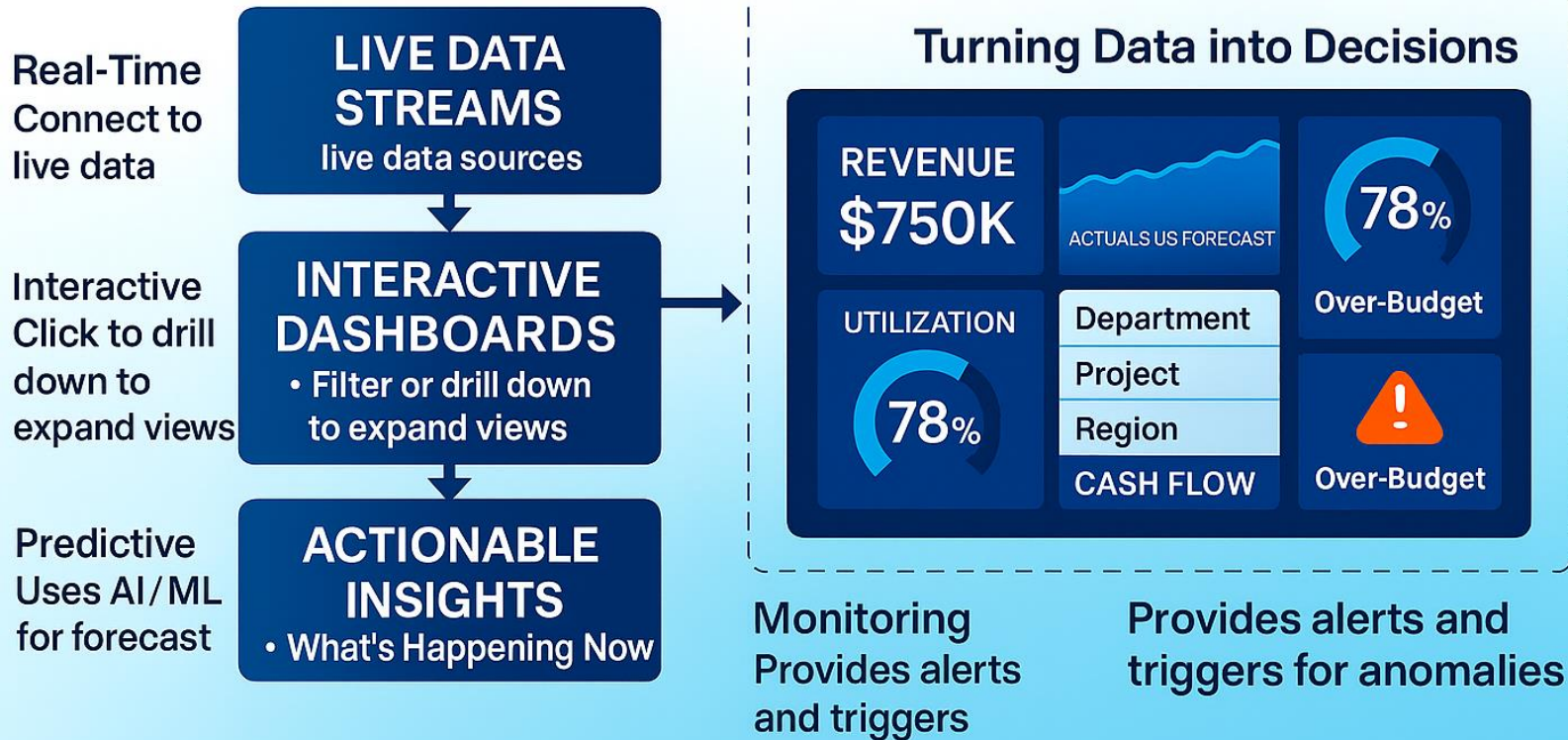


Actual vs Budget

Example Tools: Excel, PDF exports, Cognos/Deltek stanlard reports

» The Evolution of Reports to Recommendations

Intelligent Dashboards – Turning Data into Decisions



» The Evolution of Reports to Recommendations

AI Dashboards – from Insights to Intelligent Action

PREDICTIVE MODELS (AI/ML)

- Forecast revenue, utilization
- Identify risk & anomalies



PRESCRIPTIVE RECOMMENDATIONS

- “What should we do next?”
- Scenario modeling
- Automated what-if analysis



ACTIONABLE INSIGHTS & AUTOMATION

- Smart alerts & workflows
- Decision recommendations
- Continuous optimization



Automate
Report Generation

» Why AI Dashboards?

Real-Time Decision Making



Instant Insight to Action:

AI dashboards analyze live data streams and surface critical metrics, enabling leaders to make immediate, informed decisions as conditions change.



Proactive Intelligence:

Embedded AI models detect anomalies and predict outcomes, providing alerts and recommendations before issues escalate.



Continuous Optimization:

Automated workflows and feedback loops adjust processes in real time, ensuring ongoing performance improvement and agility.

» Why AI Dashboards?

Context-Aware Recommendations



Adaptive Insights: AI dashboards analyze real-time data within its operational context—such as project phase, resource levels, or client type—to deliver tailored recommendations relevant to current conditions.



Personalized Decision Support: The system adjusts guidance based on user roles, priorities, and historical behavior, ensuring each stakeholder receives actionable insights aligned with their specific responsibilities.



Situational Intelligence: By combining contextual factors (e.g., timing, location, performance thresholds), AI dashboards suggest the most effective next steps, optimizing outcomes with precision and relevance.

» Why AI Dashboards?

Improved Forecasting and Trend Analysis



Predictive Accuracy: AI dashboards use machine learning to analyze historical and real-time data, improving the precision of forecasts for revenue, costs, and resource utilization.



Dynamic Trend Detection: Embedded analytics automatically identify emerging patterns and shifts—allowing leaders to anticipate opportunities or risks before they materialize.



Continuous Learning Models: AI continuously refines forecasting algorithms based on new data inputs, ensuring projections remain current, and aligned with changing business conditions.

» Why AI Dashboards?

Enhanced User Experience



Intuitive Visualization: AI dashboards transform complex data into clear, interactive visuals that make insights easier to understand and act upon.



Personalized Interface: Adaptive layouts and content adjust to user preferences, roles, and frequently accessed metrics for a more relevant experience



Conversational Interaction: Integrated AI assistants and natural language queries allow users to ask questions, explore data, and generate insights effortlessly

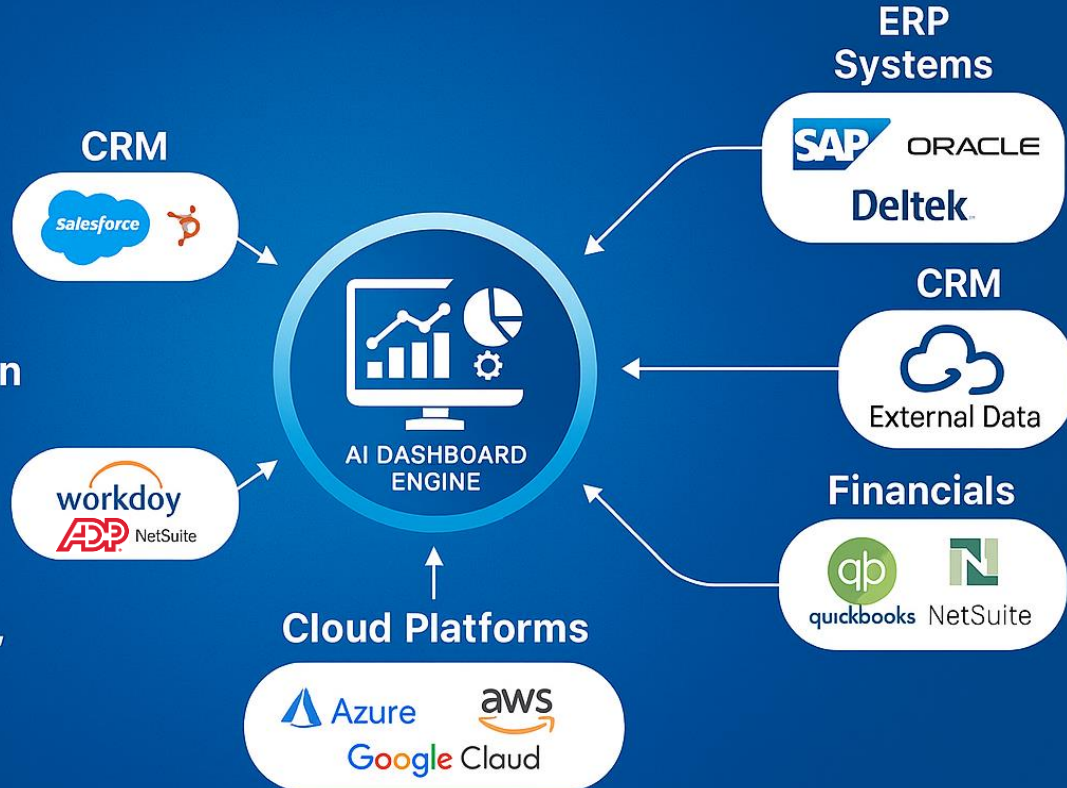
» Key Features of AI Driven Dashboards

Incorporates Multiple Data Sources

- **Unified View**
Aggregates structured and unstructured data for comprehensive analysis

- **Seamless Integration**
Connects disparate systems through APIs and data pipelines

- **Data Enrichment**
AI harmonizes, cleanses, and contextualizes data for smarter insights



» Key Features of AI Driven Dashboards

Predictive Analysis- Anticipating What Comes Next

Leveraging AI and machine learning to forecast trends, performance, and outcomes

Demand Forecasting

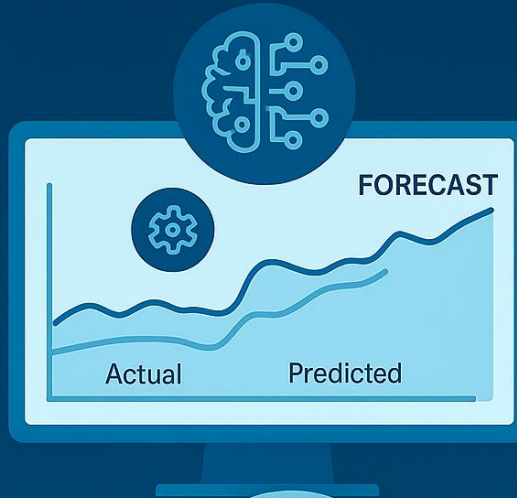
Predict future sales, utilization, or workload based on historical data

Outcome Simulation

Run "What If" scenarios to evaluate decisions

Risk Prediction

Identify potential cost overruns or performance bottlenecks



Predictive Insights

AI models forecast trends across time, cost, and performance metrics

Early Warning System

Provides alerts for anomalies or deviations from projected goals

Smarter Planning

Informs proactive decisions and resource allocation

Key Features of AI Driven Dashboards

Highlighting Areas of Concern in Real Time

Proactive detection of anomalies, data errors, and emerging patterns

DETECTION CAPABILITIES



Anomaly Detection

Identifies outliers in cost, time, or utilization metrics using ML models



Error Identification

Detects data entry issues, missing values, or inconsistent reporting



BUSINESS IMPACT



Early Intervention

Alerts stakeholders before issues escalate



Improved Data Integrity

Reduces errors and enhances trust in analytics

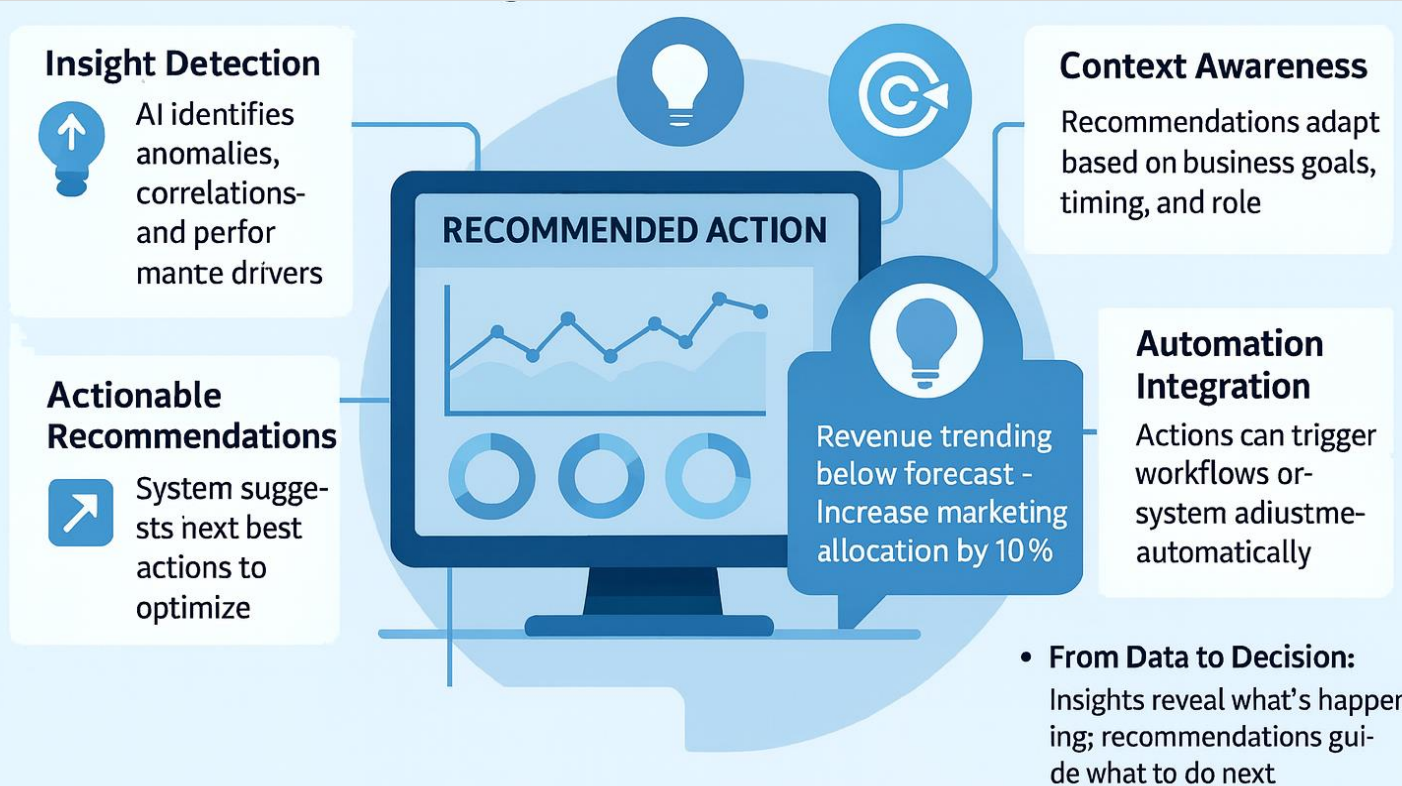


Proactive Decision-Making

Enables timely responses to prevent cost or schedule overruns

Transforming Data into Actionable Intelligence

Insights & Recommendations – Turning Analytics into Action



» Transforming Data into Actionable Intelligence

Steps to Success

Data Collection



- Determine objectives and KPIs
- Aggregate structured & unstructured data

Data Analysis



- Analyze data
- Correct invalid datasets if found
- Apply AI/ML for insights

Recommendations



- Generate tailored recommendations
- Enable informed decisions
- Build automations

» Case Study for Government Contractors

AI-Enabled Reporting for Government Contractors

From Compliance Reports to Predictive Performance Insights

Traditional Reporting Challenges



Siloed data across accounting, projects, and compliance systems



Manual Excel-based reporting



Lagging indicators; reactive insights

AI Dashboard

Project Performance



Compliance Monit.

- ✓ DCAA
- ✓ FAR
- ✓ DPARS
- ✓ NIST

Financial Summary

Labor Utilization

Indirect Rates

Cash Flow



\$12M

0.3%

Forecast



Predictive cost at completion

100% ± 5%
No claims taken the future

AI Dashboard Outcomes



Automated integration of Costpoint, Linanet, and financial data



Real-time project and compliance visibility



Predictive-analytics highlight risk of overruns or noncompliance

Case Study Metrics



30% reduction in monthly close reporting time



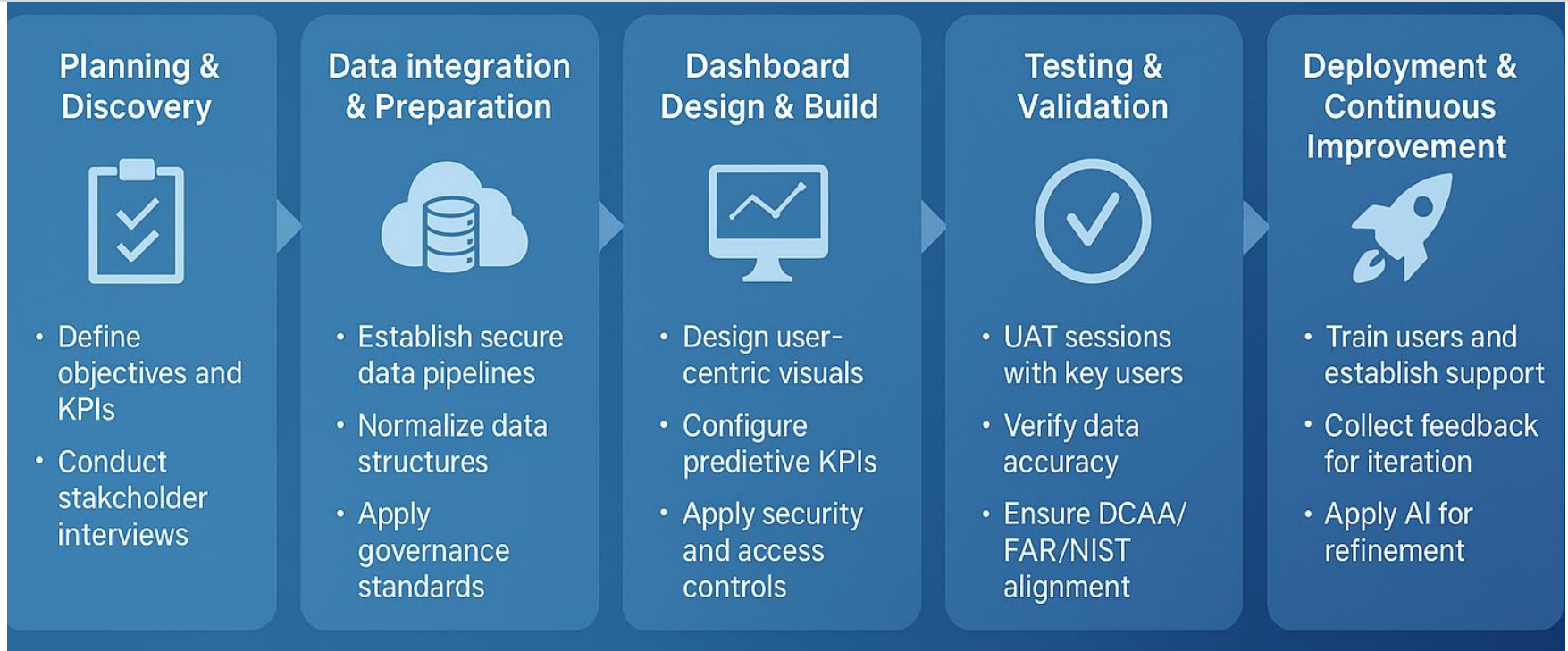
20% improvement in forecasting accuracy



Enhanced DCAA audit readiness through automated controls

» AI Dashboard Implementation Roadmap

Build the Best Fit Solution for Your Business and Industry



Success builds stage by stage – from structured data to actionable intelligence

» Challenges & Best Practices for AI Modernization

Steps to Success

Challenges



- Data Silos (segregated by solution)
- Data Quality
 - Inconsistent data
 - Data that does not reconcile
- Managing Ethical and Compliance Considerations



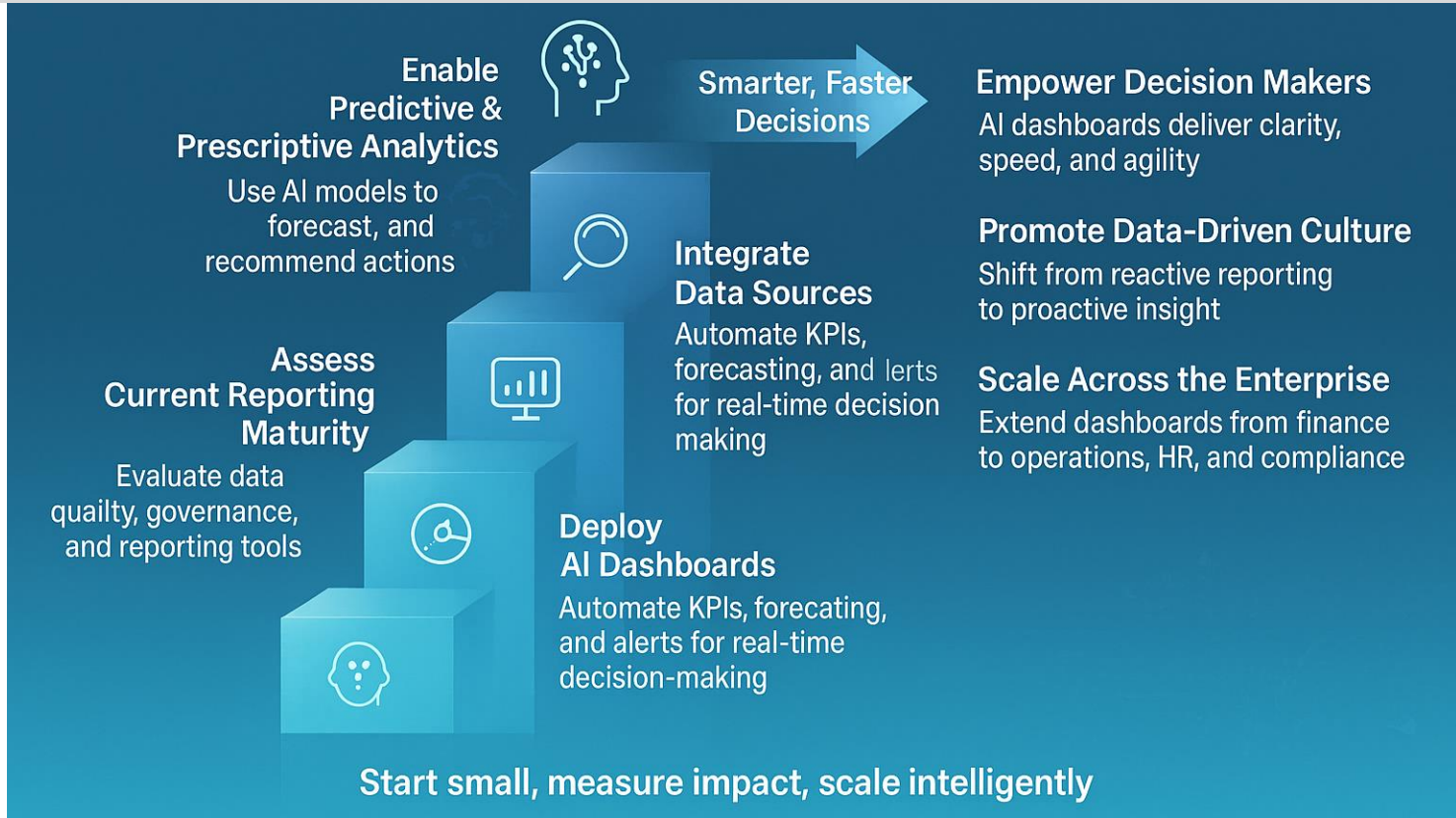
Best Practices



- Begin with high-value use cases
- Ensure strong Data Governance
- Provide User Training & Support

» Conclusions & Next Steps

Advancing with Dashboards



Question	Answer
What is the best method for adopting an AI Dashboard and reporting to executive Leadership?	Best practice for adoption of AI dashboards, is to start with the teams that are the closest to the data. They can ensure that the information that is being provided is expected and accurate before presentation or usage by upstream team members, stakeholders, and execute leadership.
What are the key considerations for government contractors using AI and LLM models?	Compliance: Ensure that your model is compliant with regulations such as FAR, DFAR and others, and understands legal and contractual language. Security: Ensure that the selected model has strong data security and privacy policies, whether using in a private cloud or an on-premise solution. Long-Context Processing: Ability to process long documents, analysis, and completing complex related tasks. Fine-tuning: Open-source models like Llama 2 allow fine-tuning based on proprietary government datasets.

Question	Answer
Do we have any recommendations on the best LLM models for government contractors? Top Open Source LLMs (specific for Government and Policy Analysis) DeepSeek-R1: Reasoning Model 1. Provides reinforced learning (RL), highest performance for analysis across math, code, and reasoning tasks. Qwen3 1. Mixed of Experts model 2. Designed to support switches between operational modes 3. Complete logical reasoning tasks	There are many LLM models that can provide benefits to your organization. Whether you're using an off-shelf model or a proprietary model, you'll want to define what capabilities does the model need to support, whether it's legal or policy analysis, long-contextual processing, or compliance checks, these are all important in the decision. Decisions such as Proprietary models like Gemini or GPT, offer strong performance and a wide range of capabilities. However, use of open-source options like Llama 3 and Deepseek-R1, may be of more value. Other considerations when selecting a model is the interoperability between the LLM and other platforms in use – example: Microsoft 365 (integration).

» Conclusions & Next Steps

Advancing with Dashboards

Conclusions



AI Dashboards transform static reports into actionable recommendations



AI Dashboards drive efficiencies, compliance, and provides for strategic advantages based on recommendations and insights

Next Steps



Identify business areas, operations, or programs that would benefit from AI enabled dashboards



Measure impact and refine & augment

Learn how Iuvo Systems can assist your organization with deploying AI Dashboards to drive efficiencies, compliance and other strategic objectives.

» How Iuvo Systems Can Help

AI Dashboard Implementation Services

GovCon Implementation Services for AI Dashboard Enablement

AI Data Modernization & Integration Services

Building A Single Source of Truth

Includes:

- Data Quality Assessment
- Data Warehouse / Lakehouse Architecture
- Integration with ERP, Payroll, CERM, other data
- Data governance aligned with DCAA, CMMC, and DFARS

AI-Enabled Dashboards & Analytics Development

Decision Intelligence

Includes:

- Power BI, Tableau / Looker AI dashboard design
- Predictive analytics models (cost overruns, revenue forecasting, Indirect rates, resourcing, backlog, forecasts)
- Intelligent alerts, monitoring
- Insights & Recommendations
- Executive KPI scorecards

AI Adoption, Change Management & Program Enablement

Includes:

- AI readiness assessments
- Change Management for PMs, Finance, FP&A and Executives
- Training on use of AI Dashboards
- Governance Framework
- AI Centers of Excellence, workflow redesign
- PMO analytics and processes

Session Resources and Next Steps

ATTENDEE PORTAL RESOURCES:

- » Session PDF Materials
- » Feedback Survey
- » CPE Letter (post-conference)

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