My Story's New Chapter

Deploying Alteryx at Sunbelt Rentals with Speed & Scale

May 2026

Why Sunbelt, Why Now

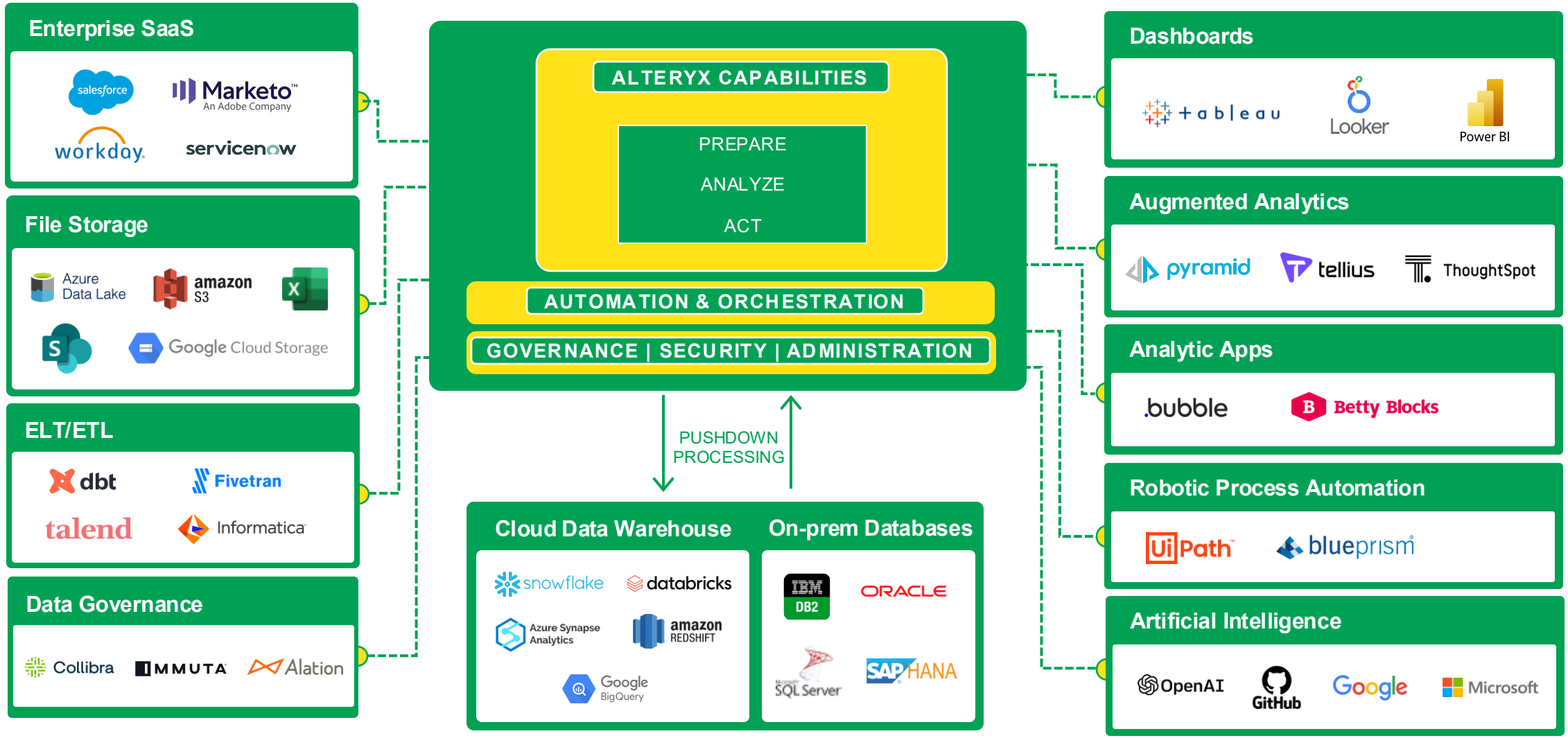
Building a Scalable, AI-enhanced Analytics Foundation

CFO Buy-In: Veteran AYX sponsor with vision for widespread transformation

IT Alignment: Understanding current state + AYX opportunity, connectivity requirements

Data Connectivity & Ingestion

Alteryx Connects to the Enterprise to Streamline Analytics



Strategic Insights & Automation

How SIA Creates Value through Automation

Employees

- **2** full-time employees originally from the business
- Currently, building out internal team to support

Internal Contractors

- **3** self-service tool experts
- **25+** collective years' coding and analytics experience
- Depth of external knowledge from various industries

External Resources

alteryx

Microsoft PowerApps

Aimpoint Digital

Power Automate

Power BI

Horizon Five

Training

Provide quarterly in-depth trainings for self-service automation tools

Internal Consulting

Consult on enterprise automations and organization-wide projects

Build Support

Offer ad hoc internal build support, guidance and automation creation

Community

Create internal user communities for cross-functional collaboration

Change Management

Assist on process changes to promote an automation mindset

SUNBELT RENTALS

Why Sunbelt, Why Now

Building a Scalable Analytics Foundation

325 Users Enabled: Across 7 functional groups to bridge internal knowledge gap.

80 Certifications: Building a self-service community that evolves with user skills.

Automation Sprints Drive Meaningful Impact

Send us your team's availability today!

What do we do:

1. Train Users
2. Identify Opportunities
3. Build Assist
4. Deliver Value

How it works:

- Run 8 to 12-week Automation Sprints by team
- Kaizens for 2 teams per Quarter
- SIA will identify & implement complex & high impact use cases

Align to Sunbelt 4.0 Principles
Relentless Pursuit of Efficiency and Effectiveness
Executional Excellence and Continuous Improvement
A Talent Destination
Deep Business Insights and Foresight
Strategic Business Leadership

Why Sunbelt, Why Now

Building a Scalable Analytics Foundation

50+ Deployments: Active automations in Finance Ops, Accounting, Treasury, FP&A, Fleet, and Others

Q3 & Q4 Automation Wins in FY26

1 Accounting

Manual Invoices

- Dynamically pulls data from 4 connections and emails a compliance report

Asset Impairments Calc

BNE and ENB Calc

- Produces end to end workpaper for Earned Not Billed and Billed Not Earned calculations

P*Q Email Reporting

- Reviews P*Q tracker to send out email requests for audit support documentation

Halt Error Reports

- Identify potential errors by leveraging a workflow to apply a combination of rules

Fixed Assets - LOT and Serialized files

2 Tax

Use Tax Calc

- Asset listing and overall calculation

Invoice downloads (Hyland Onbase)

- Hyland OnBase Unity Client RPA Exports individual PDFs based on a custom list of invoices

Fixed Asset Invoice list

Fixed Asset PO Assignment

- For assets missing POs, automate the identification of POs leveraging WSDATA

3 Finance Ops

Climate Control FOR Report (Daily)

- Automation to Capture daily sales by category/ region and calculate YOY and MOM and DOD

Profit Sharing Automation

- Converting the incoming data into static and creating random samples for each analyst to audit

Daily FOR Activity & Trend Report

- Expand Daily FOR Forecast For All LOBs

Payroll Cost Analysis

- Identifying anomalies and reporting them through intelligent alert system in Alteryx

4 Treasury & Cash

AP Statement Matching

Credit Collections

AP Vendor Specific PDF Parsing

Daily Credit Card Recon (Phase 1)

- Reconciliation of daily credit card transactions between WYNNE and TEMPUS systems

Daily Cash Reporting Automation

- Capturing daily Aps. Payrolls, Inflows, etc and showing the cash flow

5 Fleet | OpEx | Other

Fleet Management

- Daily report pulls

Lease Accounting

- Converting 1,500 .xls files to .xlsx

MLO Transportation (OP Excellence)

- Automate Excel Charts Creates 25 tabs with 20 charts each. 500 Timeline Charts created in 6 seconds instead of 6 days.

HOW TO DRIVE AUTOMATION WITH BUSINESS PARTNERSHIP

Strategic Insights & Automation

1. **Training**
   Nurture the community and raise awareness with training sessions and events
2. **Development Support**
   Provide users with the necessary tools and channels to grow and add value to their processes
3. **Connectivity**
   Identify proper data sources that align with overall enterprise business strategy
4. **Community**
   Build internal user communities for cross functional collaboration

BUSINESS TEAMS

1. **Develop Skillset**
   Learn the tools of the automation & continual education post-deployment
2. **Deploy Automation**
   Launch and utilize automation, while leading adoption of the automation with user group
3. **Monitor, Support, & Maintain**
   Monitor automation, identify enhancements, and establish maintenance for automation
4. **Collaboration**
   Collaborate with team members to share knowledge and connect with other functions to identify standard solutions

Why Sunbelt, Why Now

Building a Scalable Analytics Foundation

Phase 1 Complete: Server readiness and initial automation inventory aligned to SOX scope.

Phase 2 Underway: SOPs, RACI & control environment for SOX; **Audit Readiness** and **Scaling Compliance** through automated monitoring and AI.

Transformation Takes Time

- Create your village
- Be Persistent, Don’t Give Up
- Train and empower the users
- Implement a governance model early
- Create solutions with a mindset for future scalability.

SUNBELT®
RENTALS