

#### From the

## Editor's desk



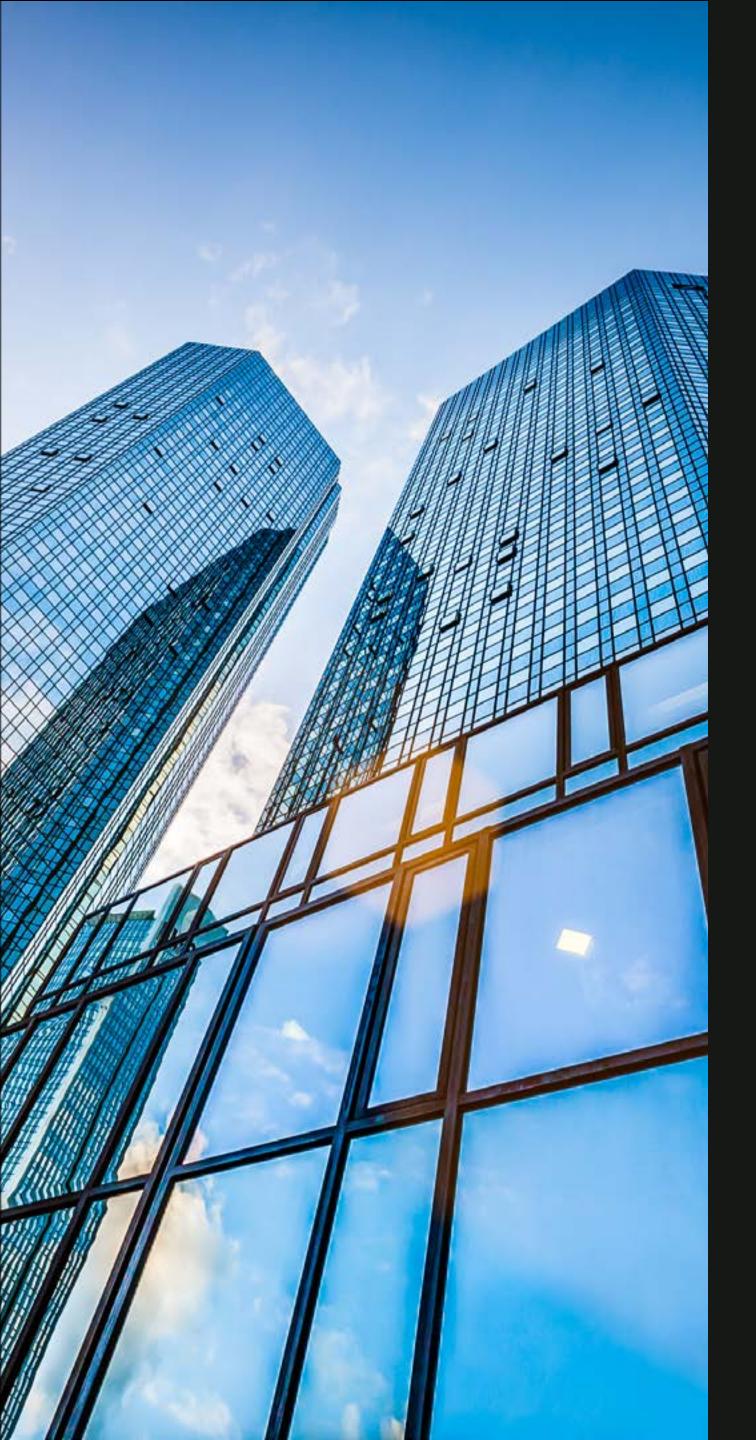
**Alfred Sanders**CFO Forum Program Leader

As the CFO, you're at the center of a profound shift—where data-driven insights, rapid technological advancements, and rising stakeholder expectations come together. The Fourth Industrial Revolution is not just changing the tools at your disposal; it's redefining how finance leaders shape strategy, mitigate risks, and foster sustainable growth in an increasingly complex business environment.

Drawing from Genpact's work with leading organizations, this edition of The CFO Forum Journal explores the challenges and opportunities ahead, with a focus on actionable findings to guide your path. Whether you're starting your artificial intelligence (AI) journey or staying ahead of the curve, these pages are packed with practical strategies to help you succeed in an AI-powered world and accelerate the future of your organization. Each article builds on the last, delving into the critical importance of AI in finance and outlining how it can enhance decision-making, spark innovation, and deliver impactful outcomes.

As you read through, I hope this Journal inspires you to embrace 2025 with confidence and creativity. Thank you for being a valued part of our community.

Dr. Alfred Sanders serves as the CFO Forum program leader and brings a wealth of experience as a business consultant and educator, with a focus on finance strategy, technology, and operational efficiency. As a partner with Genpact's CFO consulting practice, he has adeptly guided organizations through complex shared service center designs, transformations, and technology solutions. Prior to Genpact, Alfred held the roles of CFO (brokerage), partner at consulting firms, and head of global financial operations.



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#### Letter from the

## CFO Forum Leader



Dear finance leaders,

Looking back, 2024 was a remarkable year for CFOs as the transformative power of generative AI (gen AI) became clear. Through our CFO Forum meetings in New York, Chicago, and London, we discussed challenges and opportunities that Al, gen Al, and data management bring to modern finance.

We heard that the most forward-looking CFOs are taking a collaborative approach, working closely with their C-suite peers to identify and prioritize Al projects that will have the greatest impact. CEOs are challenging CFOs to champion initiatives that go beyond back-office efficiencies—projects that improve speed to market, boost revenues, and enhance customer experiences.

Scaling AI responsibly remains a priority. While many CFOs are cautious about adopting these fast-evolving technologies, they're taking proactive steps through proof-of-concept initiatives. These smaller-scale projects allow organizations to test Al's potential and begin using Al-enabling tools, like Microsoft Copilot, Snowflake, and Databricks, to implement AI solutions that deliver real value.

Good data is at the core of every successful AI initiative, but managing it remains a challenge. Instead of waiting for a complete data overhaul, CFOs are validating subsets of data for specific projects, which accelerates timelines and enables faster implementation of critical solutions. Governance continues to remain top of mind, not only with respect to quality of data, but also on monitoring the ongoing accuracy and compliance of Al-generated output.

As we head into 2025, I encourage you to continue pushing boundaries, sharing ideas, building your digitally savvy team, and taking advantage of your networks. Together, we can shape a finance function that is not only future-ready, but also sets the standard for strategic value creation.

Thank you for your continued partnership and for making this year's CFO Forums such a success. I look forward to seeing how we evolve together in the year ahead.

All the best. Ed Fitzpatrick CFO Forum Leader

Ed Fitzpatrick is the CFO Forum lead and host. As a senior client advisor, Ed has worked with CFOs and other C-suite executives to address emerging areas of transformation in finance, using Genpact's deep technology, business, and industry expertise. Prior to his current role, Ed served as CFO at Genpact and CFO at Motorola/Motorola Solutions. Ed is currently a 10+ year board member at Cboe Global Markets (Cboe), currently chairs the Compensation and Risk and Executive Committees and was formerly the chair of the Audit and Finance and Strategy Committees.

### CFOs reflect on 2024

The role of CFOs has always been about steering organizations through change, and the Fourth Industrial Revolution is pushing the boundaries of what's possible. CFOs have shifted their focus from the earlier waves of technology that were once at the forefront of innovation – like enterprise resource planning, ecommerce platforms, and big data solutions—to groundbreaking technologies like AI, cloud computing, financial technology (fintech), and autonomous machines.

As we reflect on the key themes of 2024, we asked leading CFOs to share their perspectives on this transformative year. Here's what they had to say:



"I believe 2024 was a tipping-point year for AI and how it is used by companies. Structures to prioritize use cases for efficiency, cost reduction, and effectiveness are well underway and driving value. I think 2025 will accelerate on this front and move towards AI and technology improving broader end-to-end work processes, making even bigger impacts. We are in the early stages for what AI can do for business."

**Dave Marberger** EVP and CFO, Conagra Brands



"2024 will certainly be remembered as the year when AI started to be a day-to-day reality for most of us. AI has its own challenges but will ultimately do some good to all of us by augmenting our human capabilities."

**Olivier Thirot**EVP and CFO, Kelly Services



"In 2024, Otsuka deepened our commitment to maximizing our use of AI for competitive advantage. We established an AI council to support governance around building the best AI use cases, enabling us to learn more and exploit the power of AI throughout the organization."

**Steve Rosen**SVP and CFO, Otsuka America Pharmaceuticals Inc and
Otsuka Pharmaceutical Development and Commercialization





"2024 was a year of enlightenment and education, as far as Al goes. We've seen creative thinking across our organization on how we can take advantage of it – for our efficiency and to better serve our customers. 2025 will be a time of experimentation to find the value and understand how to become proficient at project identification, staffing, and implementation."

**Tom Janowicz** EVP and CFO, Penske Transportation Solutions



"Al clearly will have a transformative effect on Mitsubishi UFJ Financial Group and the financial services industry over the next several years. Although it is early days, we are beginning to see benefits from the use of Al-embedded applications. Use cases are emerging, and we are excited about the potential to drive efficiency in our business and to enhance complex problem-solving capabilities for our clients."

**Mark Thumser** Chief Financial and Strategy Officer, Mitsubishi UFJ Financial Group Americas



"Al and the advances it can deliver in both enhancing product delivery, and increasing productivity and efficiency is a consistent talking point in many of our market discussions. At Hamilton, we support the development of digital trading solutions and augmented underwriting, particularly opportunities that will assist in making the most of our considerable and valuable data asset. Al certainly has the ability to be a catalyst for change and progress."

**Robert Vetch**CFO, Hamilton Global Specialty

## Inside the CFO Forum

Step into the CFO Forum, a platform where CFOs from various industries come together to share knowledge, insights, and experiences; discuss common challenges and issues; and review solutions to critical business problems.

By offering a collection of best practices and lessons learned from industry peers, the CFO Forum aims to empower finance and accounting professionals to make more informed decisions. Its rich content is invaluable for anyone seeking to enhance their understanding of the finance landscape and improve their organization's performance.

The CFO Forum is built on camaraderie and a shared purpose, showcasing the leaders who are shaping the future of finance together.









## Upcoming 2025 events

The CFO Forum will host five events in 2025. With leading companies having shared their expert perspectives on gen Al, we will again have an exceptional line up this year. Join us to connect and grow within our financial community.

For information on future events, visit our

**CFO Forum website** 





## Al insights and stories

## Six generative Al lessons every CFO should take into 2025

Originally published in CFO.com

The Fourth Industrial Revolution, driven by advancements in AI, is fundamentally changing the way we live, work, and relate to one another at a faster rate than ever.

CFOs are leading the charge, guiding their companies through both the opportunities and challenges that gen Al brings. From overcoming outdated systems to finding new ways to innovate, finance leaders are quickly adapting to stay competitive.

Based on insights from our 2024 CFO Forums, here are six key lessons shaping their approach to gen AI:

## 01. Gen Al is empowering CFOs to lead their organizations into the technological revolution

As CFOs absorb the impact and vel ocity of gen Al on their business models, the technology has become a tool for creating a competitive advantage. The goal is to use gen Al to gain benefits beyond productivity, such as improving products, accelerating time to market, or elevating the customer experience—all of which pave the way for increased sales and growth.

While gen Al is not the only priority for CFOs, no CFO wants to get left behind by not leveraging this technology.

## 02. Companies are at various stages of their gen Al journey, but all see the future

Companies are not at the finish line of their gen Al adoption journeys, as there appears to be no finish line to cross with the ever-changing speed of technology. As gen Al is developing and being used in new ways, CFOs need to maintain a mindset of continuous adaptation and evolution.

However, despite this approach, there are still challenges that prevent CFO potential. The biggest obstacle is dealing with outdated, disconnected systems from decades of "best-in-class" solution implementations and corporate acquisitions, leading to poor quality data management. As a result, it's difficult for CFOs to access and use data effectively across the organization.

The opportunity to leapfrog the competition with technology rests with those best able to consolidate and cleanse relevant data. Gen AI, after all, is only as powerful as the quality of data it is fed.

### 03. CFOs are getting creative with how they select gen Al initiatives

Whether it's using Al-powered chatbots for customer service or applying predictive analytics for financial forecasting, the list of opportunities seems endless—but the resources are limited. The goal is to identify gen Al projects that provide the biggest bang for the buck.

To do this, forward-looking CFOs are experimenting with how to best choose gen Al projects. As we learned at our recent CFO Forum events, CFOs are fostering a sense of excitement by running contests across the organization to come up with fresh ideas on how to best deploy Al solutions to create value.

## 04. An ROI with new technology is not always easy—or the only priority

One issue in achieving a solid ROI and quality operational benefits is how well employees embrace using gen AI. Getting people to change how they do things is challenging, regardless of the technology. Proper change management is essential, much like when implementing legacy systems. To ease the transition, CFOs are focusing on gradual integration by offering ongoing support, clear

communication, and highlighting quick wins that show staff how even small changes can make their daily tasks more manageable.

CFOs also face challenges in quantifying soft benefits, such as being able to process or audit more transactions without reducing headcount. The traditional headcount cost model may be less relevant in the Fourth Industrial Revolution, where the real value comes from improving product quality, customer satisfaction, and employee experience. While the number of staff members may remain the same, the skills required are evolving, with employees needing to adapt to new technologies, rather than be replaced by them.

## 05. CFOs are strengthening their partnerships with chief information officers (CIOs)

CFOs are convinced that collaboration with CIOs and chief technology officers is critical, given the growing amount of data and the need to turn it into actionable insights to support customer and shareholder value. Together with technology teams, CFOs can better tackle key business opportunities where AI can make a significant impact, helping technology investments align closely with strategic business objectives.

In addition, because solid data management is crucial to success with gen AI, many CFOs are partnering with CIOs to use cloud solutions like Snowflake and Databricks to better manage their data. As a result, baseline data analytics and AI training across the enterprise have become more essential.

## 06. Employees are getting upskilled to meet technology needs

Given the global appetite for AI and gen AI skill sets, CFOs realize that attracting and retaining AI talent is difficult and costly. Finance leaders are assessing the best way to develop their existing teams and improve their AI competency levels through training and selective hiring. As more manual processes are



automated, staff trained to apply the latest technology will add the most value.

As the Fourth Industrial Revolution picks up speed, CFOs who push the boundaries of what's possible with gen Al will set the pace for everyone else. Those who embrace change, forge strategic partnerships, and empower their teams to tap into this promising technology will turn today's challenges into tomorrow's competitive edge.

## The Al opportunity in finance is real—here's how leaders are staying ahead of the curve

The buzz around AI in finance is more than just talk it's a game-changing movement reshaping how the sector operates.

In fact, according to our recent survey of 550 business leaders across industries the next two years are critical to gain a competitive edge from gen Al's potential.

To dig deeper into how finance leaders are charting the course, we brought together a group of executives for a roundtable discussion. Joined by a Gartner expert, we gathered lessons on what's working, what's causing headaches, and the strategies they're using to stay ahead.

Now, we're sharing these learnings to keep you at the forefront of the AI revolution.

#### Top use cases

Where are CFOs getting the most use out of Al? The roundtable highlighted that most AI initiatives in finance are focused on intelligent process automation and anomaly detection.

These areas are catching on faster than others, mainly because there are now more off-the-shelf Al solutions available. Such ready-made projects are

designed for widespread use and fit right into existing financial systems without any major tweaks needed.

Finance leaders are seeing the benefits first-hand. For example, they're enhancing business operations by investing in Al-driven chatbots and virtual assistants. These tools provide staff with a greater understanding of data through easy-to-use, everyday language queries, helping them make better decisions and understand customer needs more effectively.

#### Keep reading to explore:

- The biggest hurdles to adopting Al from talent shortages to data quality challenges—and how leaders are overcoming them
- The emerging role of synthetic data and how it's paving the way for even more innovation in finance
- How partnerships with external data providers are unlocking deeper insights and decision-making power

## How to harness the transformative growth of generative Al in F&A

In the first of our two-part series on gen Al in finance and accounting, we explored why CFOs are adopting the technology, how it enhances existing digital ecosystems, and the factors that determine how best to use large language models (LLMs) to enhance business processes.

Here, we dive deeper into three prominent use cases for gen AI in finance. At Genpact, we envision that the future of finance will be defined by 00001:







Zero-touch processing

Zero exceptions

7ero time to close





Zero time to insight

One holistic experience

Gen AI is a key element in helping organizations achieve 00001. Based on our analysis, F&A operations will benefit from a 15%–25% improvement in productivity over the coming two to three years. But the broader impact goes beyond productivity. By pursuing system change and not just point solutions, CFOs will realize digital transformation and much more depending on the processes they select and the company's data maturity.

Let's explore three prominent use cases in detail:

#### Empowering the helpdesk with gen Al

Finance teams have used chatbots for several years with varying degrees of impact. Now, with ChatGPT and its ability to engage in human-like conversations based on the prompts it receives, conversational AI capabilities have improved significantly. Any business process or interaction that primarily involves responding to a query based on a body of knowledge can gain hugely from LLMs.

For finance, that means accounts payable, accounts receivable, payroll, and procurement are at the forefront of benefiting from gen AI to deliver a more efficient, engaging, and empathetic helpdesk experience.

#### Keep reading to explore:

- How gen Al makes managing journal entries easier and faster, reducing the risk of errors and speeding up the month-end close
- How gen Al turns raw data into clear insights and commentary, making financial reporting smarter and more impactful
- What the future of gen AI in finance looks like

## Reimagining finance with an Al-first approach

Originally published in Albusiness.com

Layering AI onto existing operations might boost shortterm efficiencies, but a piecemeal application of the technology delivers only incremental gains.

What if, instead of lopping off inefficiencies at the edges, CFOs could completely redesign finance operations from the ground up—with AI at the core—and boost gains on new levels beyond productivity? Such a tantalizing possibility is well within reach with an AI-first approach to finance.

Consider the example of the financial close cycle time. Instead of waiting for the end of a financial period, switching to continuous close gives finance teams the information they need at their fingertips all the time, which can result in faster decision-making. This reimagination of everyday business operations is precisely what Al-first finance delivers.

In a rapidly evolving digital environment, the very survival of business demands a strategic reboot of the Al mindset. And Al-first finance isn't about blindly using the technology in each and every process. Instead, it's about evaluating finance operations with an Al mindset and using the technology when and where it can deliver radical improvements.

But making this transition isn't without its challenges.

Adoption barriers and talent shortages

CFOs who want to adopt an Al-first approach might contend with a few stumbling blocks:

- The burden of technical debt and outdated infrastructure
- Limited access to quality, accessible, and transparent data
- A lack of Al-trained talent
- The inability to manage the change needed to achieve total alignment
- Uncertainty about regulations, security, and compliance must-dos

#### Keep reading to explore:

- How CFOs are addressing the challenges that slow Al adoption
- The four building blocks of AI-first finance, so you can unlock unparalleled results
- How algorithms are turning finance into foresight—predicting everything from warranty claims to shipment accruals in real-time, resulting in faster and more accurate decisions

### How to get started with Al agents in business

Remember the excitement of watching R2-D2 in Star Wars solve problems while helping the heroes? That's the essence of agentic Al—creating systems that think and act autonomously, much like the robots from our favorite sci-fi films. But unlike the fictional worlds, this technology is becoming a reality, with game-changing applications set to revolutionize how businesses operate.

Consider supply chain management, where data scientists optimize order fulfillment with a dynamic army of AI agents. A master agent handles strategic planning, while specialist agents track inventory and coordinate shipments. Controller agents manage timing, and execution agents integrate seamlessly with databases, shipping systems, and customer platforms. This approach enables smooth, accurate, and efficient order processing under vigilant human oversight.

While machines orchestrating complex business workflows through reasoning, planning, and independent decision-making is a significant advancement, the technology is still evolving and faces several challenges.

Let's explore the three key areas that will bring this innovation to life.

#### Enhance your data and tech foundation

Agentic AI thrives on data. The quality, variety, and timeliness of data determine how well an agent can learn and make effective decisions. As these systems scale and become more advanced, their data demands grow substantially, presenting significant challenges around data infrastructure, integration, and security.



#### Keep reading to explore:

- What to consider when building agentic AI systems—everything from prioritizing data security to designing a modular architecture
- How to prepare your team for successful Al adoption
- How to keep agentic AI safe and ethical

## Three ways Al is transforming data management

What does your enterprise data and a much-loved children's tale have in common? In the story of The Three Little Pigs, the wolf huffs and puffs, easily blowing down the houses made of straw and sticks. But the brick house stands strong, saving the pigs from danger.

Not surprisingly, enterprise leaders are finding their data foundations to be as flimsy as straw or sticks. Such frail structures have very real adverse repercussions on companies' ability to realize the benefits of AI at scale.

Case in point: While executives acknowledge that robust data strategies are essential for unlocking Al's full potential, only 16% of enterprise leaders surveyed in <a href="HFS and Genpact's gen Al report">HFS and Genpact's gen Al report</a> are using proprietary data for gen Al initiatives.

These anemic numbers are symptoms of underlying challenges organizations face, including:

 Disconnected applications from outdated systems, resulting in scattered data sources

- Lack of a single source of truth makes it hard for teams across departments to find trusted data
- Poor data quality hampers decision-making and leads to unreliable insights
- Data silos create friction and inefficiencies among teams and functions

The good news is we can change this narrative. By starting small and using targeted AI solutions that show tangible value, organizations can build confidence and momentum toward broader AI implementation at scale.

#### Keep reading to explore:

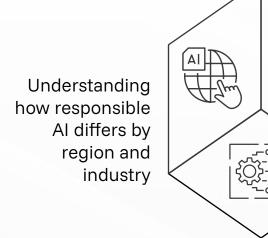
- How AI can enhance data quality to power gen AI
- How AI can improve data lineage and strengthen governance
- How AI can unify business data to improve decision-making



## Creativity and constraints: A framework for responsible generative Al

Gen AI is transforming how companies operate. Like all technologies, though, it is not infallible. For enterprise leaders, demonstrating that AI practices prioritize transparency, fairness, and accountability is critical—especially as the technology becomes mainstream.

But developing a strategy for responsible AI is not straightforward. You must navigate a maze of ethics, copyright, and intellectual property complications. So, by creating a responsible gen AI framework, companies can maintain their reputations by:



Enabling responsible decision-making

Protecting IP, data security, and gen Al models

Already, we're seeing the consequences of getting responsible AI wrong. Whether it's workers at a consumer electronics corporation accidentally leaking sensitive data to ChatGPT or a communications technology company facing public backlash for incorporating user conversations into training data for large language models (LLMs), the stakes have never been higher.

### Why enterprises need a responsible gen Al framework

A recent study by MIT Sloan Management Review and Boston Consulting Group found that 63% of Al practitioners are unprepared to address the risks of new gen Al tools. While the fundamental tenets of Al development still apply, gen Al creates new challenges. With heavy reliance on visual and textual data, mostly scraped from the internet, there are many ethical implications and potential biases to overcome.

#### Keep reading to explore:

- The biggest challenges of gen Al adoption
- A six-element framework for responsible gen Al
- How a leading bank uses responsible Al for accurate, transparent decision-making
- How to embed responsible AI into your company's DNA

## Research report—The CFO's quest in an Al-first world

In today's economic climate, CFOs are facing uncertainties from every direction: volatility, geopolitical tensions, and rising costs. But this instability has also opened doors for innovation.

This is why leading CFOs are pushing beyond the numbers to shape their companies' futures. In this new terrain, they're finding creative ways to grow, make strategic decisions, and leave a lasting impact on society and the environment.

This is how you can lead your business with confidence.

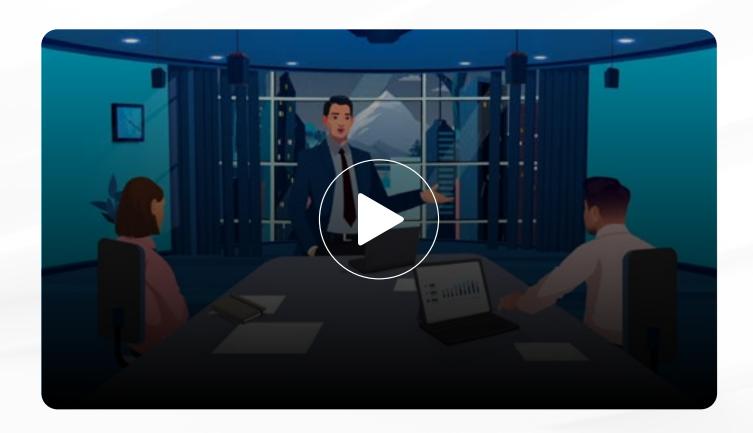
Featured in Forbes.com and in collaboration with HFS Research, our report, The CFO's quest in an Al-first world, offers a wealth of actionable insights and strategies from 21 global finance leaders, interviewed in depth and analyzed at length.

The report explores how they're navigating change and becoming champions of growth by:

- Unlocking agility through digital transformation: Peek into the future of finance operations: streamlined, connected, and automated by digital technologies
- Using the power of gen AI and predictive analytics: Find out how these hot technologies are strengthening forecasts and personalizing data and insights
- Owning the sustainability agenda: Learn how CFOs are incorporating ESG metrics into their goals

Follow in the footsteps of CFOs who are already on their quests. Get started with our report.

**Download the report** 



## Research report—The two-year gen Al countdown

Business leaders worldwide are racing to embrace gen AI to reimagine how we work. But navigating this revolution is not without its perils. To explore how organizations are charting the course, we've partnered with HFS Research, a global business research firm, to gather perspectives and insights from 550 senior leaders across industries.

#### Our study covers these core areas:

Adoption	95% of respondents' companies have not reached gen Al maturity, but those that have share key characteristics and goals
Investments	61% dedicate up to 10% of their tech budgets to gen AI, demonstrating their commitment to the technology
Strategy	52% say a sole focus on productivity is misleading, neglecting the broader benefits and capabilities of Al
Transformation	74% say gen AI is a springboard for value creation, but still see productivity as the top benefit
Urgency	The next two years are critical for realizing gen Al's potential as the technology rapidly reshapes the competitive scene

As you stand at the forefront of this evolution, use this report to craft a robust strategy and fully unlock the benefits of Al.

**Download the report** 

## Case study—Derisking, automating, and transforming expense auditing with Al

#### Who we worked with:

A leading pharmaceutical and healthcare company headquartered in the US

#### What the company needed:

- Centralized and standardized travel and entertainment (T&E) expense auditing and management across
   70 countries
- To maximize the audit coverage of employee expense reports and better track employee expense data and compliance
- To enhance expense risk management by proactively reducing noncompliant spend and fraud

#### How we helped:

- Implemented our holistic compliance-as-a-service solution, powered by AppZen's Al-powered expense auditing platform, enabling full review of all transactions by automating the analysis of spend receipts and standardizing the expense audit methodology
- Implemented continuous monitoring using interactive and intuitive reporting dashboards with drill-down capabilities to identify trends and patterns
- Used an analytics-based expense review system to identify root causes of waste and fraud to take immediate corrective action

#### What the company got:

- Improved coverage of T&E expense data with a complete review of all employee expense transactions prior to payment
- Vastly enhanced regulatory and fraud compliance checks for policy, regulatory, and fraud risks, preventing penalties and avoiding prosecution
- Savings of 0.5% of total T&E expense within a 12-month period and improved employee spend compliance

Read the full case study for detailed insights

## Case study—Powering Al innovation

Get a glimpse into how leading organizations are using Al to enhance decision-making, streamline processes, and foster innovation at scale.

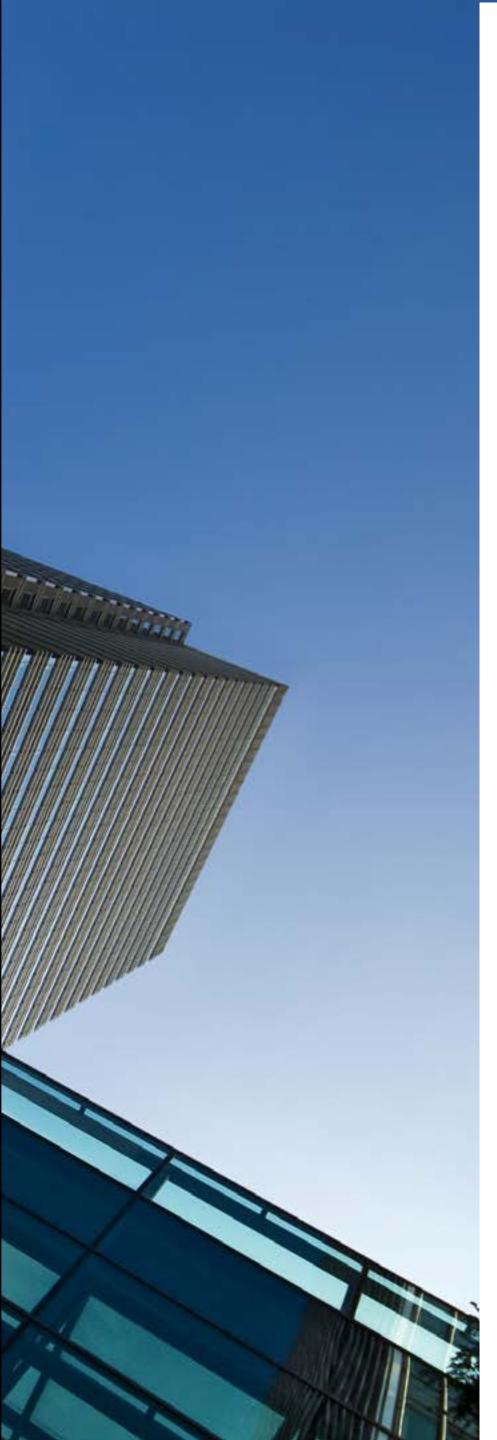
By exploring these use cases, you'll gain practical Al applications, understand its potential to solve business challenges, and identify strategies to unlock value in your organization.

#### Featured stories:

- An Al-powered virtual assistant guides supply chain agents at a leading IT services provider and synchronizes actions across finance, supply chain, and sales
- How Dropbox cuts its procurement cycle by 50% by using ServiceNow's AI capabilities to transform its procurement, sourcing, and case management operations
- How Volkswagen Financial Services is improving employee onboarding with our gen Al-powered chatbot, Cora Knowledge Assist

**Check out the full selection** 





## Closing thoughts

From the learnings that surfaced in 2024, one thing is clear: Al is not merely enhancing finance teams; it's altering their entire strategic framework.

CFOs who use AI effectively are now leading their organizations with greater agility and precision, becoming key drivers of innovation and transformation. This evolution is redefining what it means to be a CFO today—one who is not just a steward of financial information but also a strategic partner in advancing business growth.

Going forward into 2025, finance professionals who embrace emerging technologies will pave the way for more impactful operations, continuing to set new benchmarks for success. We hope that the lessons shared throughout this edition inspire a clear vision and empower you to lead with purpose, creating meaningful progress in your organization.

For more information:

**Visit the CFO Forum website** 

