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**Deloitte Finance Forward Event**  
**Leading with AI** - *Spring 2026 edition*

# AI in Business Finance — Where Are We Today

*A quick scan of what we're seeing across the market*

## Mounting Pressure

Across our client base, we consistently see the same pattern — more planning cycles, tighter close deadlines, growing reporting demands, and teams that aren't growing at the same pace.

## Low Value-Add Ratio

Research suggests only about 25% of FP&A time is spent on actual analysis and business partnering. The rest goes to data gathering, reconciliation, and manual reporting\* — exactly the areas where AI can help.

## AI Is Production-Ready

AI capabilities in EPM have moved beyond experimentation. They are now embedded natively in the platforms Finance already uses.







## The Conversation Has Shifted

Among our clients, the question is moving from "what can AI do for Finance?" to "where do we start, and how do we scale?" — which is exactly why we wanted to set the scene before diving into the breakout.

*Source: Bain & Company, "When Financial Planning and Analysis Needs an Overhaul"*

# AI Across the Finance Value Chain

*Leading EPM platforms now offer embedded AI capabilities spanning the full cycle — from data to decision*

<b>Data Preparation &amp; Quality</b>	     	Automapping of source data, AI-driven anomaly detection, automated cleansing and validation — reducing the manual effort that typically dominates the early stages of every finance cycle
<b>Planning &amp; Forecasting</b>		Data science, multivariable predictions, ML-driven predictive models, scenario simulation, external driver integration — giving planning teams a machine-generated starting point to challenge and refine, rather than building from scratch
<b>Close &amp; Reconciliation</b>		Intelligent matching, automated exception detection, risk-based prioritization of reconciliation items — helping teams focus attention where it matters most during the close
<b>Reporting &amp; Analytics</b>		Narrative generation, natural language queries over financial data, automated variance commentary — shifting the reporting bottleneck from "producing the numbers" to "interpreting them"
<b>Agentic AI — The Next Frontier</b>		The newest development: autonomous agents that can retrieve data, run analyses, and generate reports on demand — essentially a digital team member that handles the repetitive analytical tasks
<b>Extensible AI / Build Your Own</b>		Pre-built AI routines and no-code toolkits that allow finance teams and developers to create custom AI-powered workflows — from anomaly detection to classification models

# Our Perspective

*What to think about as AI enter your finance function*

## **It's a landscape, not a single answer**

Every major EPM platform is investing in AI, but in different areas and at different levels of maturity. The right starting point depends on your current platform, your processes, and where AI can make the most meaningful impact for your team — not on what demos best.

## **Start with the process, not the technology**

The most successful AI adoption starts with a clear process pain point — a forecast that takes too long, a close that's too manual, reconciliations that consume a full team. The AI capability is the enabler, not the starting point.

## **Governance and trust are non-negotiable**

Every platform emphasizes responsible AI, transparency, and human-in-the-loop design. That matters. Finance teams need to trust the output before they'll change their way of working — and building that trust takes deliberate effort around explainability, data quality, and change management.

Deloitte works across SAP, Oracle, Anaplan, OneStream, CCH Tagetik, Pigment and others