




**Deloitte.**



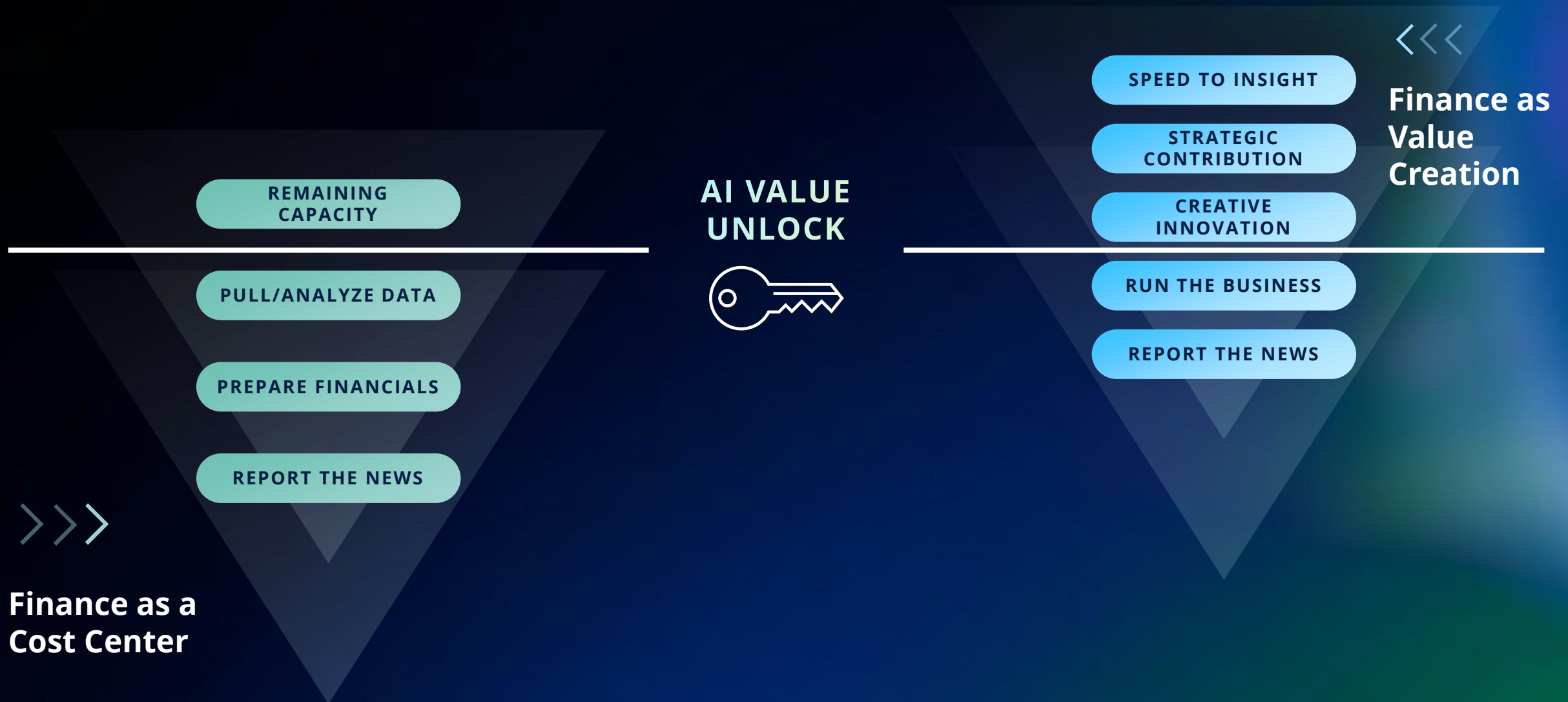
**Deloitte Finance Forward Event – *Spring 2026***  
**From CFO Vision to Value - How to Cascade Your Finance AI Strategy**

# Agenda

Topic	Duration		<b>Joris Zeijlemaker</b>
<b>1. How to cascade your Finance AI strategy</b> <ul style="list-style-type: none"><li>Your strategic intent for AI</li><li>Compelling business case</li><li>Prioritizing use cases</li><li>Adapting your operating model</li></ul>	15 min		<b>Pietro Moradei</b> <i>Senior Manager Finance Transformation Deloitte Netherlands</i>
<b>2. Client example</b> : speeding up GenAI at a leading parcel and mail delivery company	15 min		<b>Silas van Doorn</b> <i>Manager Artificial Intelligence &amp; Data Deloitte Netherlands</i>
<b>3. Q&amp;A</b>	15 min		

# How to cascade your Finance AI strategy

# AI unlocks capacity for Finance to create new value



Finance as a  
Cost Center

Finance as  
Value  
Creation

# Industries are converging

Retail



Consumer Products



Insurance



Healthcare



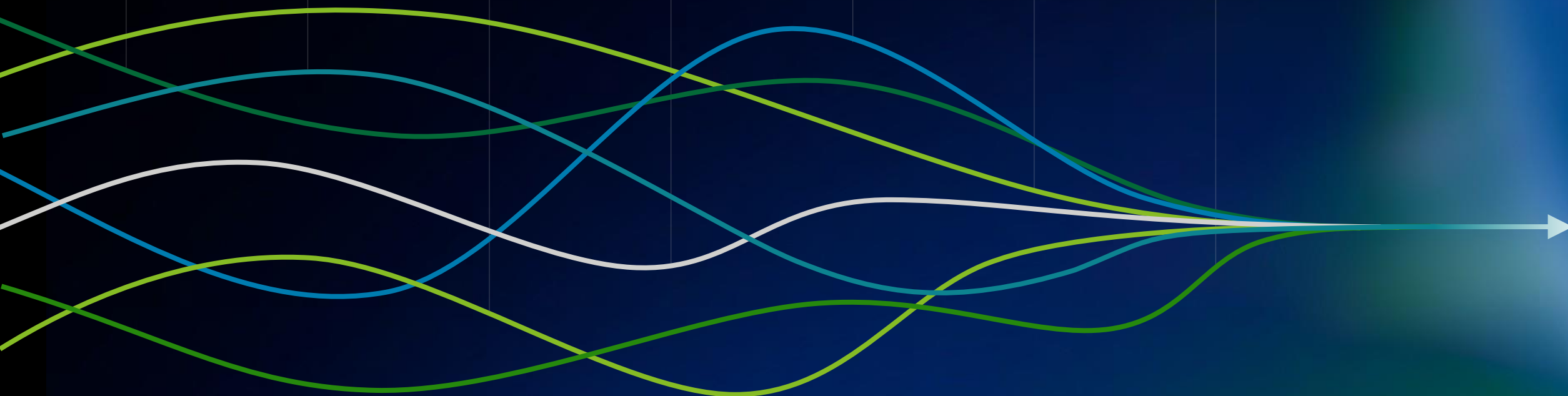
Media & Advertising



Supply Chain & Logistics



Financial Services



**Data and technology are the unifying threads**

# Maximizing AI's full potential demands careful consideration of challenges, opportunities, and key enablers for success

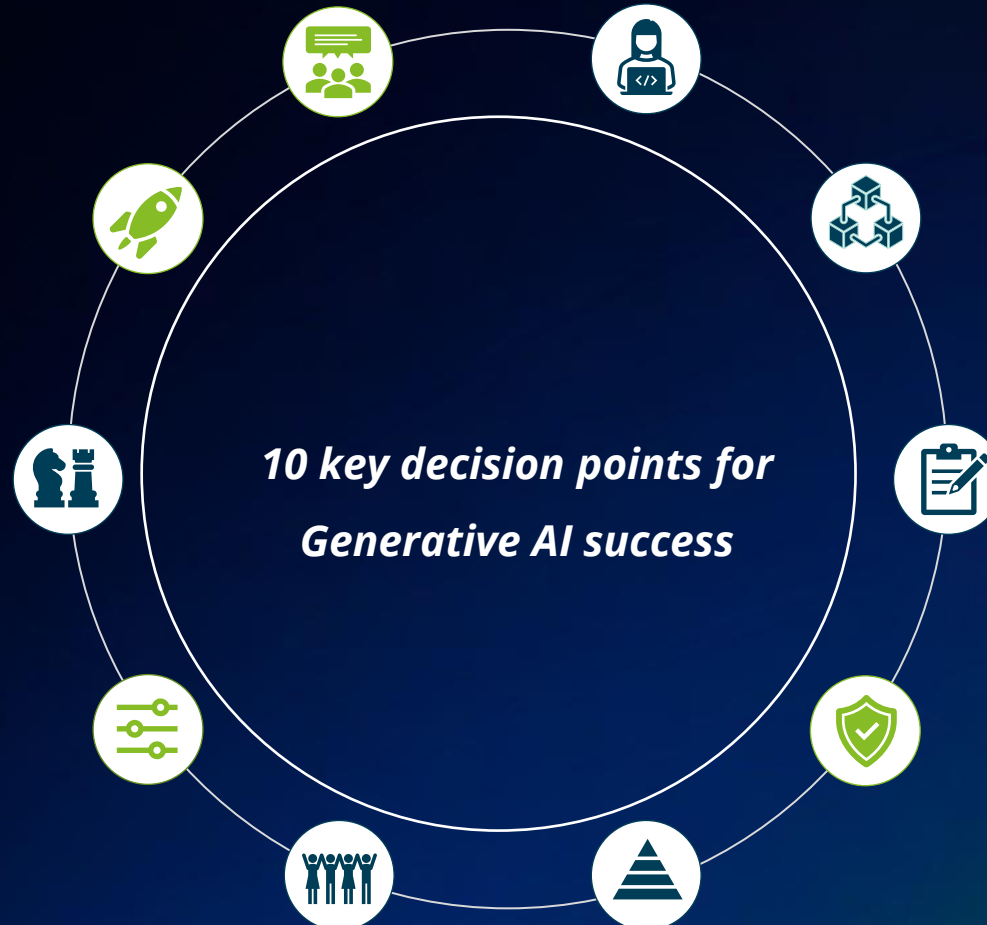
Develop a Strategic Generative AI Vision

Produce a Compelling Business Case

Identify Key Players to Inspire and Drive Transformation

Establish a Purposeful Approach to Prioritizing Use Cases

Evolve your Talent to Keep Pace



Technical Landscape

Develop an Efficient Data Governance Approach

Ensure Robust Controls

Make Risk, Privacy, and Ethics Front and Center

Adapt your Operating Model

# With a compelling Business Case to drive efficiency across Finance

FUNCTION	Operational Finance	Controllership	FP&A	Business Finance	Financial Governance & Control	Treasury	Tax	Investor Relations
PROCESS	Source-to-Pay	Accounting Policy & Governance	Strategic Planning	Sales & Commissions	Controls Framework Management	Cash & Liquidity Management	Tax Compliance	Investor Relationship Management
	Order-to-Cash	GL Management (Journals, Accruals)	Budgeting	Pricing	Corporate Governance	Foreign Exchange Management	Tax Planning & Analysis	
	Payroll Accounting	Consolidation & Close	Forecasting	Supply Chain Management	IT & Data Governance	Corporate Finance	International Tax	
	Travel & Expense	External Financial Reporting	Management Reporting	Deal Desk	Compliance (Regulatory, Financial, Operational)	Bank Relationship Management	Indirect Tax	
		ESG Reporting	Analysis, Insights, and Decision Support	M&A	Internal Audit	Treasury Operations & Technology	Tax Accounting	
					Policy & Compliance			

## Expected Efficiency Gain (%)

Very low 0 - 5%	Low 5-10%	Medium 10-15%	High 15-20%	Very high 20%+
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# Defining your strategic intent for AI



## Transformation Scope

Establish the scope and limitations of AI transformation to align with strategic goals

**How do you see Gen AI being used in your organization in the next 2 to 3 years?**

**Deep:** Focused application on a specific use case / function, driving improvements in a targeted area

**Wide:** Broad integration across multiple functions & processes, aiming for end-to-end enhancements



## Value Drivers

Prioritize key elements to establish guiding principles for transformation

**In the next 12 to 18 months, I feel it is important that AI solutions should focus on:**

- **Efficiency**
- **Control**
- **Insights**



## Readiness for Change

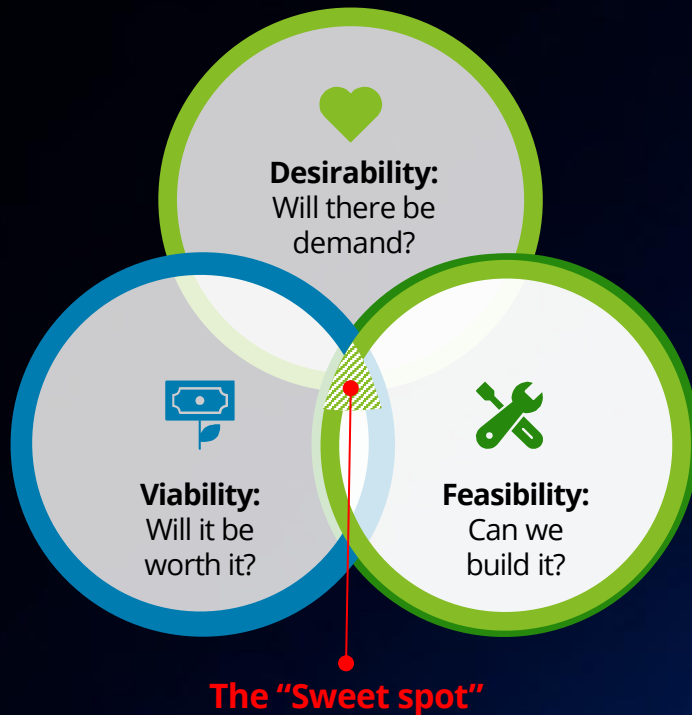
Assess organization readiness and process robustness to ensure effective transition towards the desired level

**How prepared is your organization for FinanceAI-enabled transformation?**




- **Not Ready**
- **Somewhat Ready**
- **Ready**
- **Very Ready to Go!**

# Finding your AI sweet spot(s) through use case prioritization

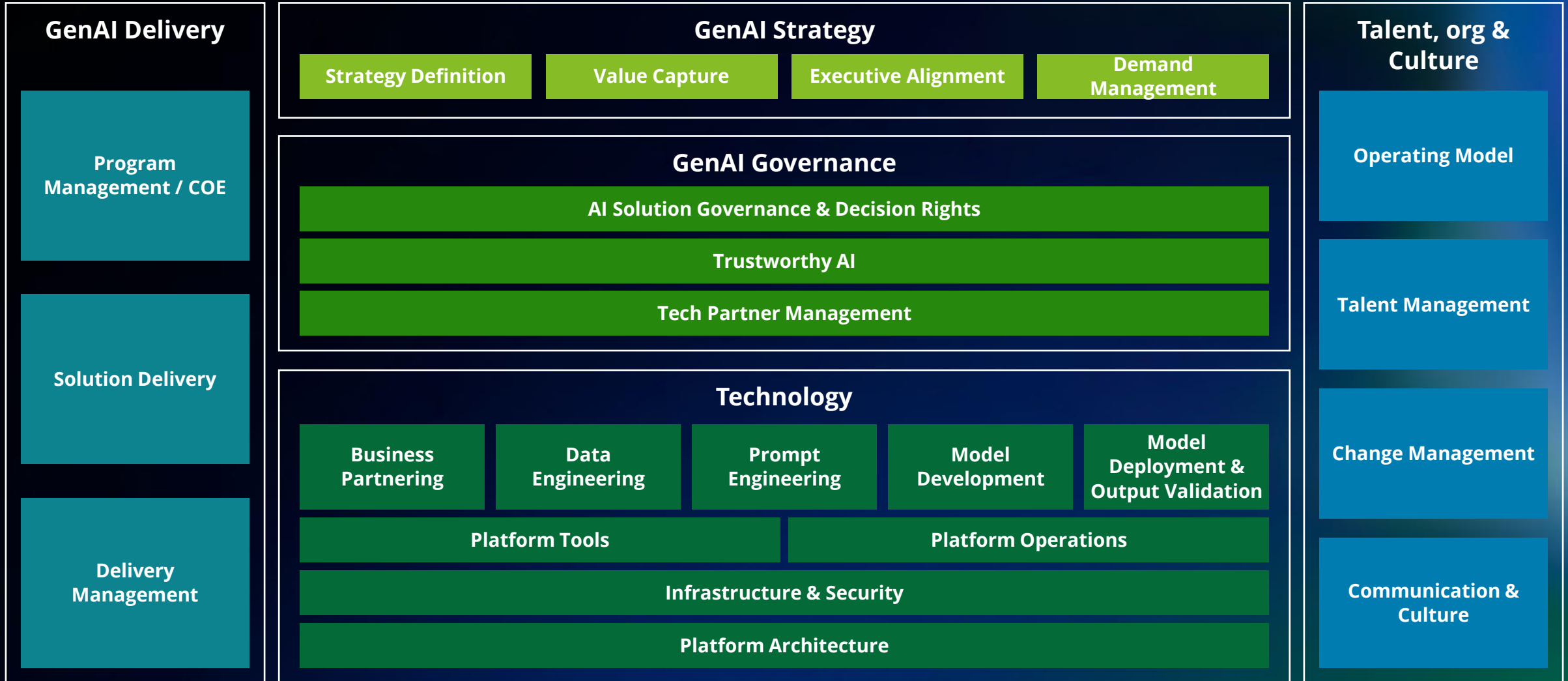
We assess selected use cases along three pillars, being desirability, viability and feasibility



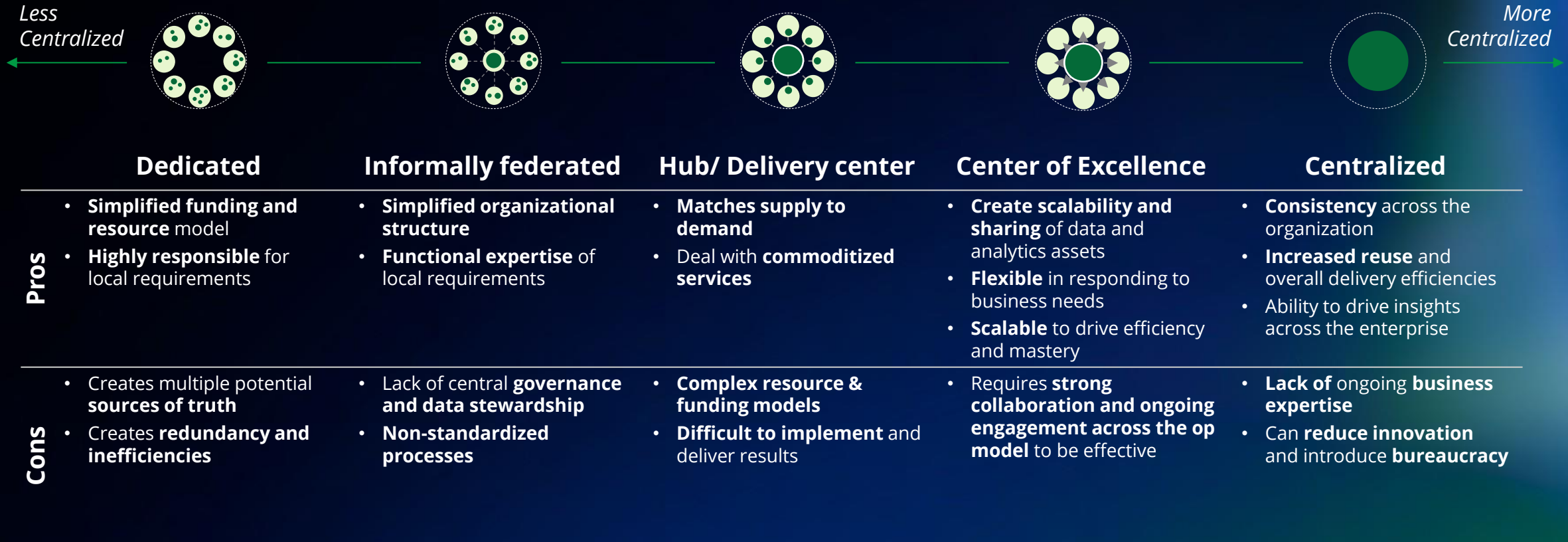
Within each pillar we have defined three criteria to evaluate use cases

PILLAR	CRITERIA	DESCRIPTION
 <b>VIABILITY</b>	• Expected cost savings	Aiming for 15% reduction, while considering absolute value of cost bucket
	• Sustainability of savings	Recurring cost savings or one-off cost savings
	• Scalability	Can we leverage the solution for other applications across
 <b>DESIRABILITY</b>	• Strategic fit	Potential to become an USP or basic application across industry?
	• Internal buy-in from stakeholders	Is there already buy-in from internal stakeholders?
	• Benefits for end-users/customers	Is the benefit wanted by end-users / customers?
 <b>FEASIBILITY</b>	• Need for custom solution	Is there a need for a custom solution or can we buy off-the-shelf (in the future)?
	• Complexity of development	Are we able to build a PoC in 4-6 weeks? Do we have the right capabilities and resources?
	• Scaling and maintenance	Are resources expected to be available for scaling and maintenance?
	• Data availability	Do we have accurate and available (training) data?

# Adapting your Operating Model by building GenAI capabilities...



# ... and select the optimal capability setup for your organization



# Client case study

Speeding up GenAI at a leading parcel and mail delivery company

# Situation: A Leading European Parcel & Mail Operator at a Crossroads



## Who they are

- **Leading parcel and mail carrier** in a mature European market
- Large **market share** with national **logistics** network
- Ambition to lead in **digital, innovative** and **sustainable** logistics



## Business context

- **Highly competitive** market with digital entrants, rising expectations and margin pressure
- **Multi-year cost-reduction program** targeting overheads and indirect costs by 2025
- Must improve **delivery speed and reliability** while controlling costs



## Technology

- Existing **data, analytics and ML capabilities**, but value is fragmented across functions
- Seeking **tangible GenAI** use cases that deliver measurable **cost, productivity and service improvements**
- Must comply with strict **data quality, privacy, security and ethics** requirements

# Our approach: Deliver impact fast, while building the organization and technology for scale

## Short-term Value Delivery



Select **1–3 high-impact GenAI use cases** with clear cost/productivity upside, rapidly pilot them in priority areas (customer service, finance ops, logistics), and use a prioritization funnel to score value, feasibility and risk.

- Delivered working prototypes within weeks, with **quantified savings potential**
- Built a **validated backlog** of GenAI opportunities across functions
- Created simple **benefit tracking** for pilots and roll-outs

## Accelerate Organizational Change



Establish a **cross-functional GenAI CoE** with a clear mandate, **defined roles and operating model** across business, IT, risk and compliance, and implement data, privacy, security and ethics guardrails.

- Defined a **GenAI CoE** aligned with existing analytics and digital functions
- Established an **end-to-end delivery process** from idea intake to scaled deployment
- Implemented **governance and risk controls** for GenAI use cases

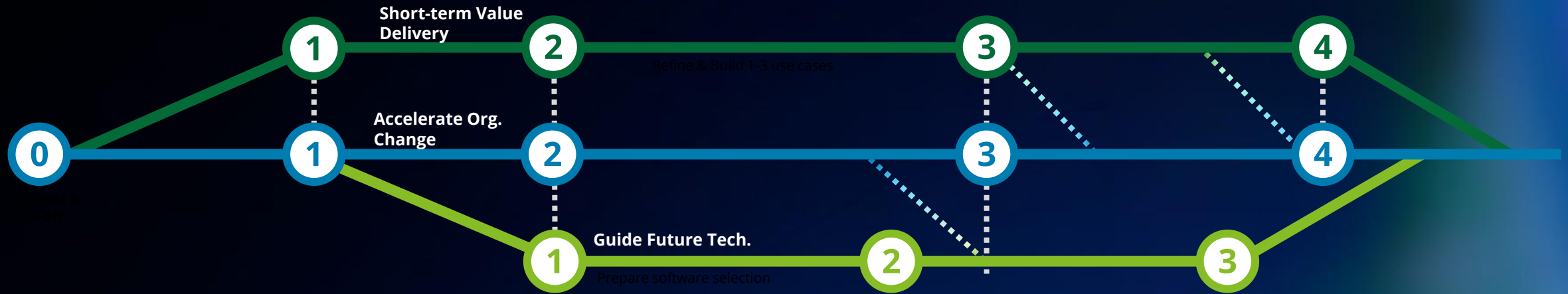
## Guide Future Technology



Design a **modular GenAI reference architecture** using existing data and cloud platforms, **clarify responsibilities between internal teams and external partners**, and define processes for deployment, monitoring and iteration.

- Created a **reusable GenAI reference architecture** for future use cases
- Enabled platform / DevOps teams to **integrate GenAI safely into existing landscape**
- Agreed a **partnership model** with key technology vendors

# Our approach: How the three pillars work together over a 12-week journey



## Short-term Value Delivery

### Key objective

*To ensure cost saving opportunities are identified and delivered through the development of GenAI use cases*

## Accelerate Organizational Change

### Key objective

*To ensure GenAI capabilities are organized, coordinated and concentrated in a taskforce that accelerates GenAI*

## Guide Future Technology

### Key objective

*To ensure long-term control on GenAI capabilities through technology and partnerships*

# Identifying high-impact use cases: A four-step prioritization funnel



1

## Long-list

Create long-list of GenAI use cases

2

## Short-list

Assess use cases using 9 criteria for Desirability (will there be demand?), Feasibility (can we build it?) and Viability (is it worth it?):

### Viability

- Expected cost savings
- Sustainability of savings
- Scalability

### Feasibility

- Strategic fit
- Internal buy-in from stakeholders
- Benefits for end-users/customers

### Desirability

- Need for custom solution
- Complexity of development
- Data availability

3

## Prioritized list

Select short-list of GenAI use cases for PoC development together with project steering committee

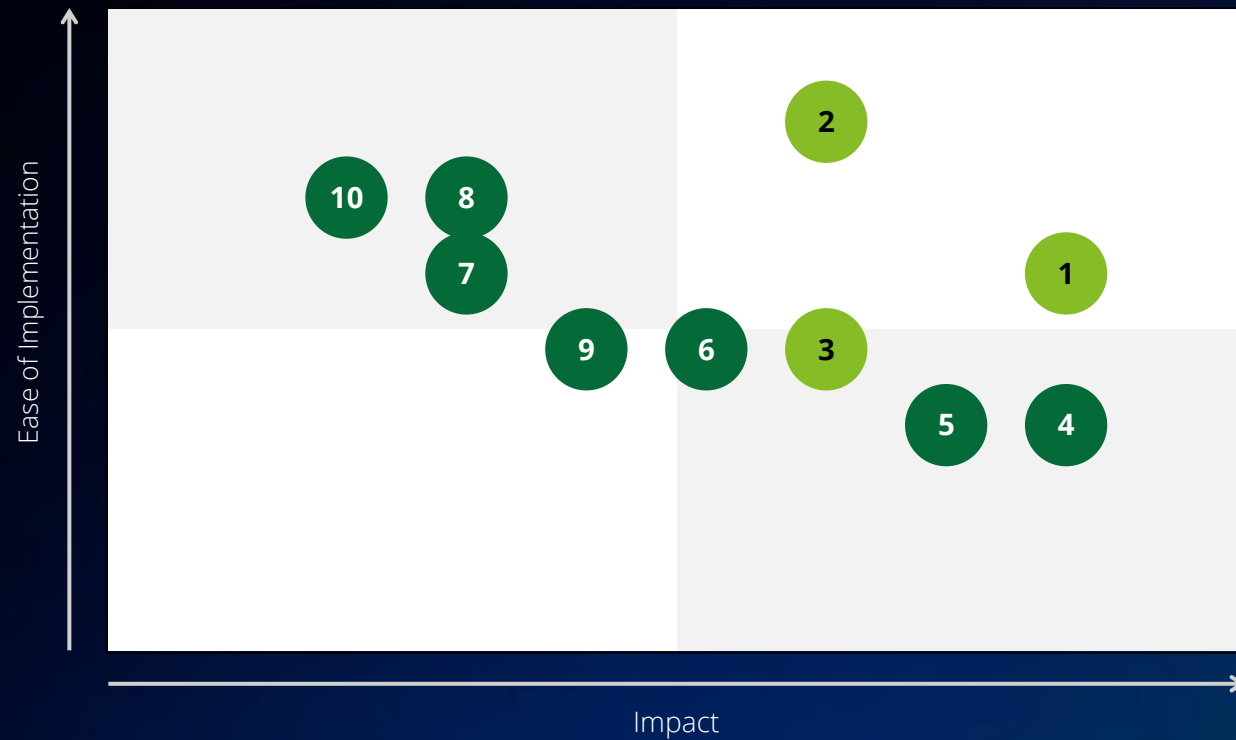
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## Confirmed Proof of Concepts

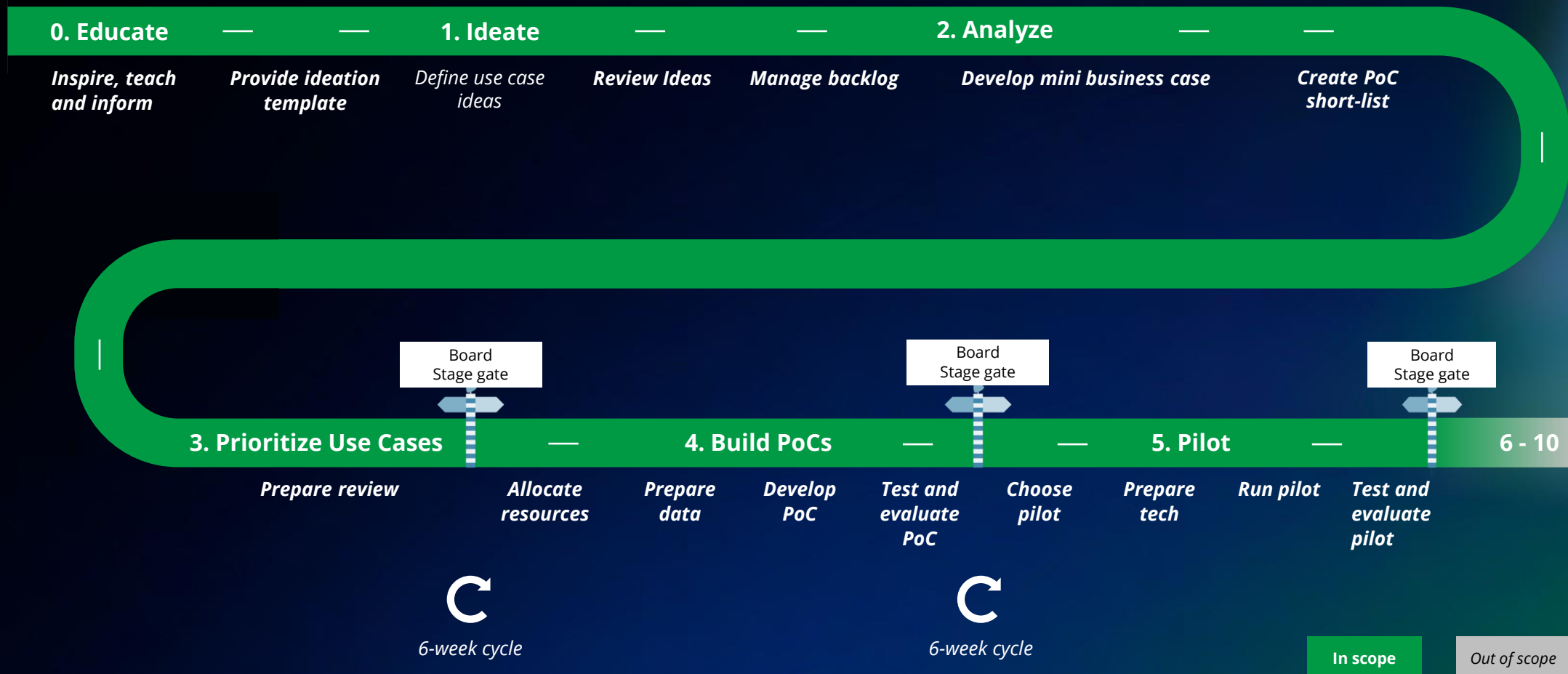
Developed and tested Proof of Concepts for 2 priority usecases

# Impact vs. effort: Prioritizing use cases for rapid value delivery

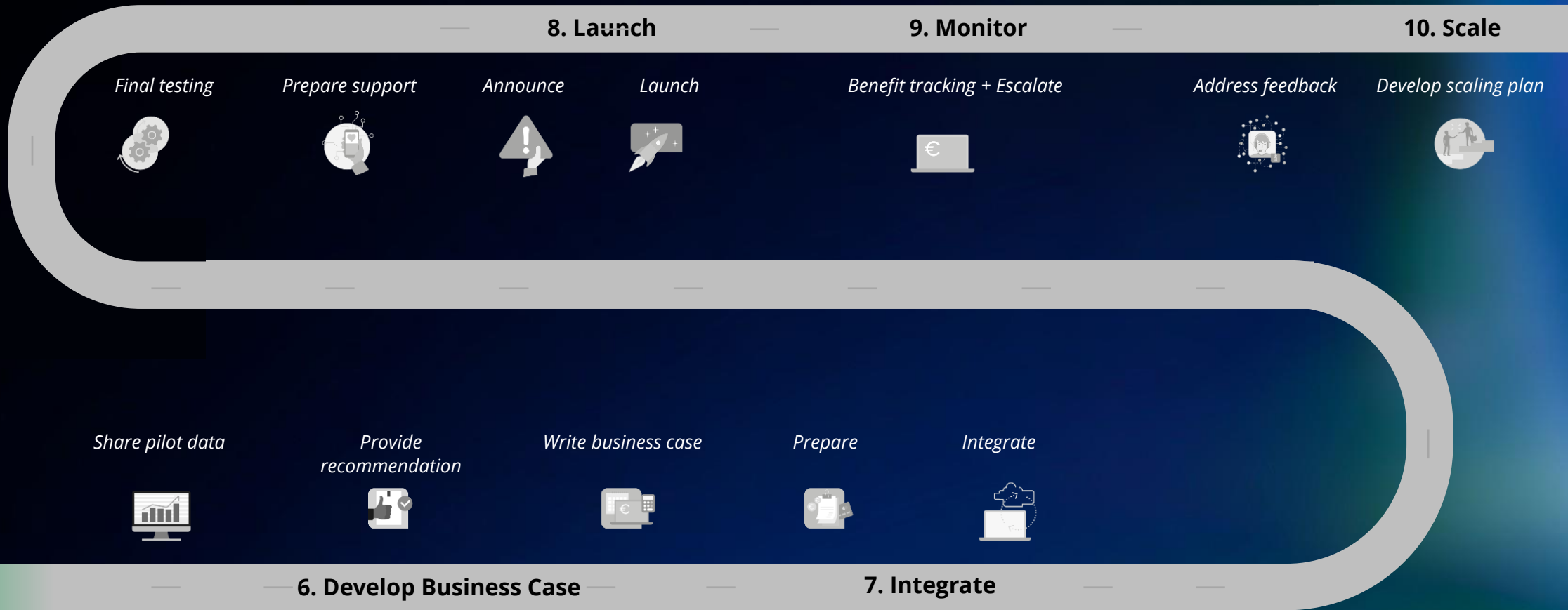
Use case analyses summary



# From ideation to scale: A structured delivery roadmap for GenAI use cases



# From pilot to scale: How business functions drive implementation and value realization



In scope

Out of scope

# Building lasting capability: A tailored GenAI playbook for independent scaling

## GenAI Capabilities & Resourcing

Gen AI capabilities that are required to build use-cases are outlined

## Buy vs. Build Framework

A framework to support the Buy vs Build decision-making in the future

## Foundational Architecture

The GenAI Lifecycle Reference Architecture shows components often needed to develop GenAI solutions

## Model Selection Methodology

To enable GenAI Capability Development, use Foundation models that balance generalizability with effort

# Maximizing AI's full potential demands careful consideration of challenges, opportunities, and key enablers for success

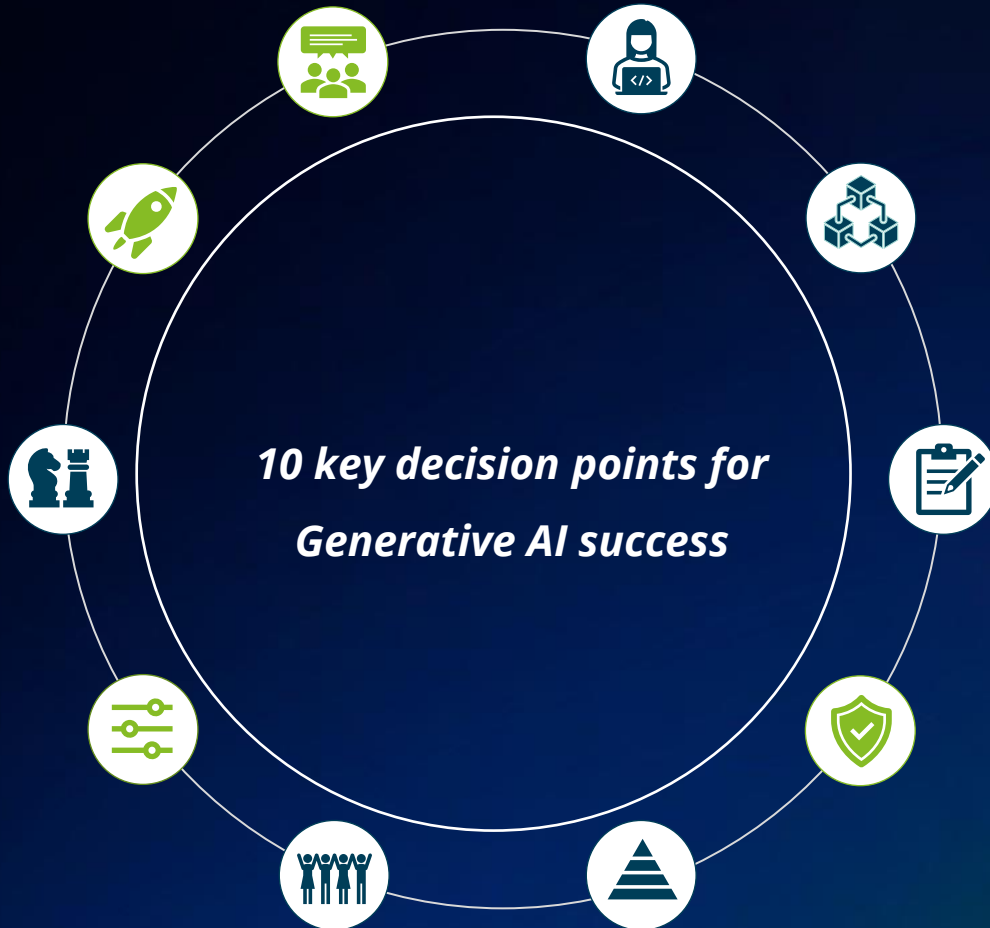
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