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Deloitte Finance Forward Event
Leading with AI



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Welcome

What Finance Leaders Tell Us

We surveyed 1,326 finance leaders globally, CFOs and senior finance professionals from companies with over \$1B in revenue. Here is what they are telling us about AI in finance...

trending_up

48%

Prioritize AI adoption

Tied with managing external challenges as their #1 priority

in-
sights

63% vs **21%**

Deployed AI vs. seeing value

The ROI gap is real and it's significant

groups

64%

Investing in tech talent

Plan to infuse new technical skills in their workforce through 2026

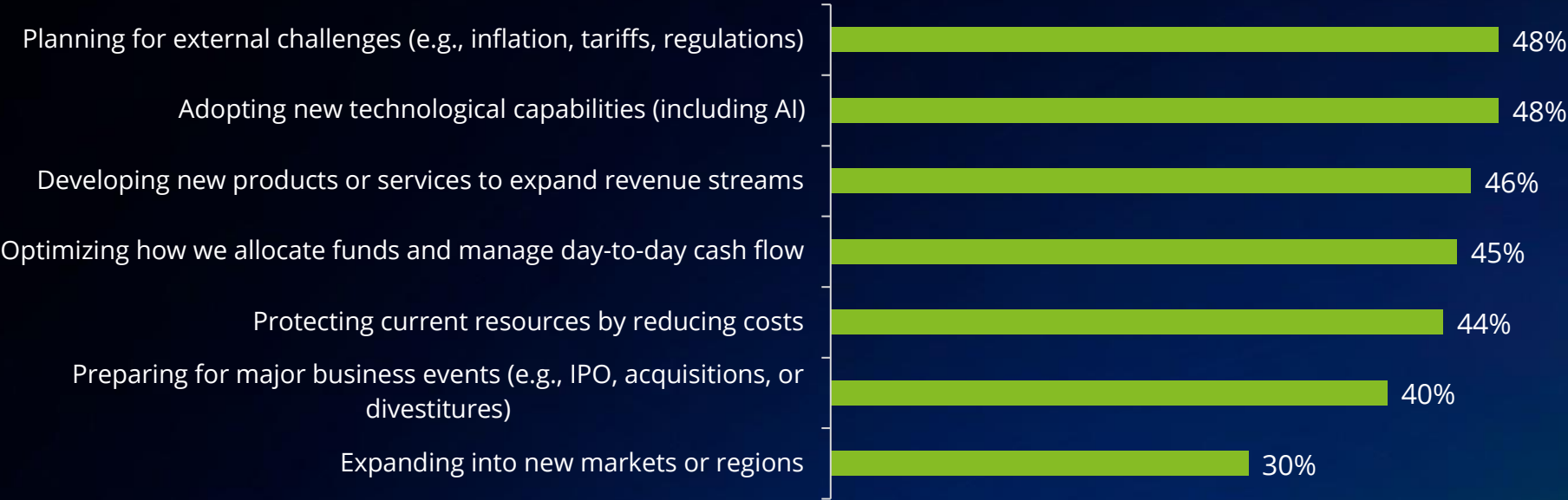
EVERYTHING EVERYWHERE ALL AT ONCE



"Everything Everywhere All at Once" (2022). Poster design by AV Print.
Distributed by A24 Films. Source: impawards.com

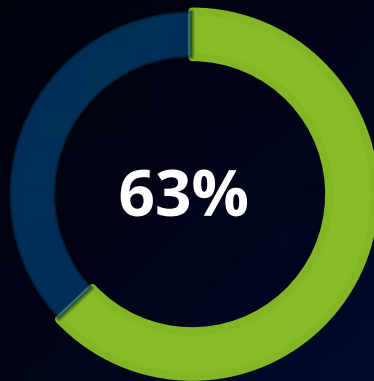
Many Finance leaders are focusing on several priorities simultaneously

Top respondent priorities through FY 26 (Percentage of respondents)

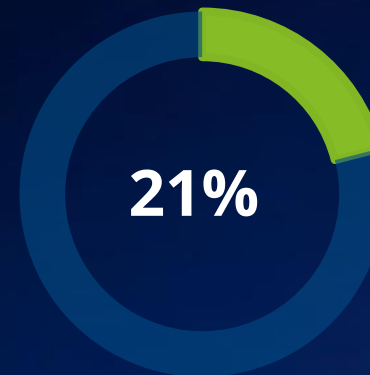


Only a 4 pt. difference between the 1st and the 5th most - cited priorities

Most finance teams use AI tools, but few have figured out their ROI



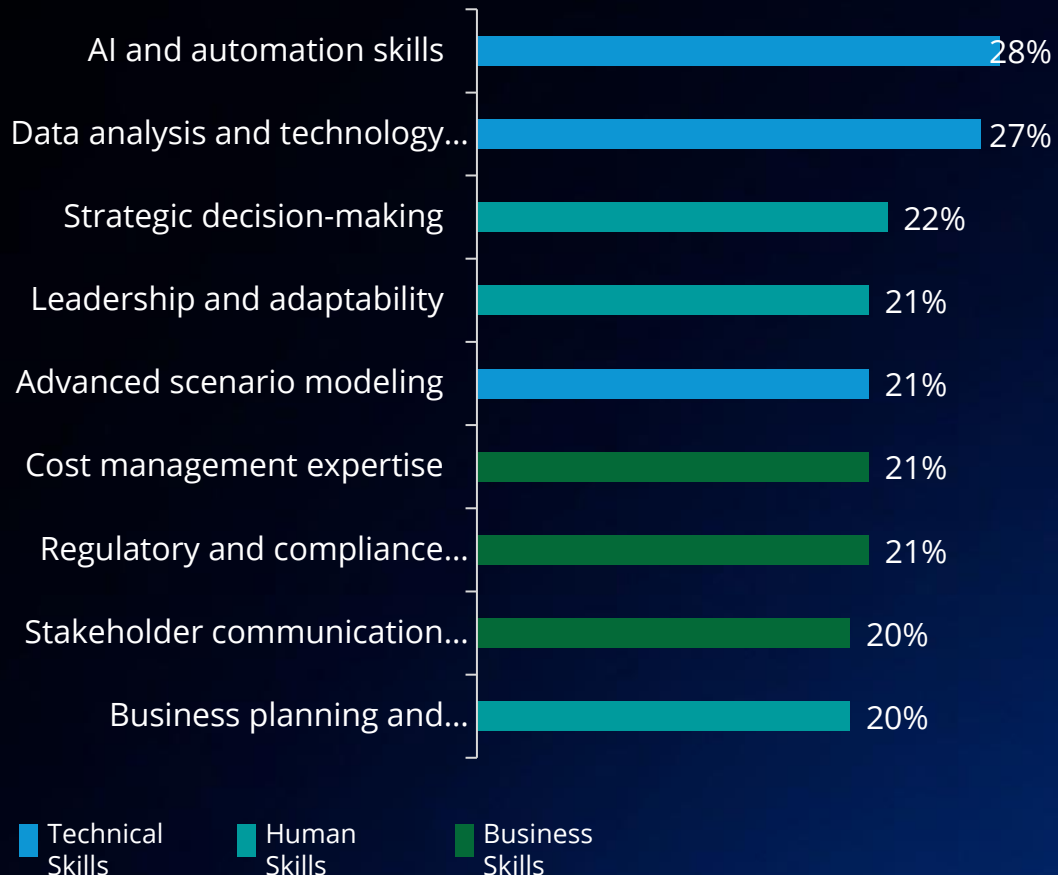
of finance leaders have **fully deployed and actively use AI within their function**



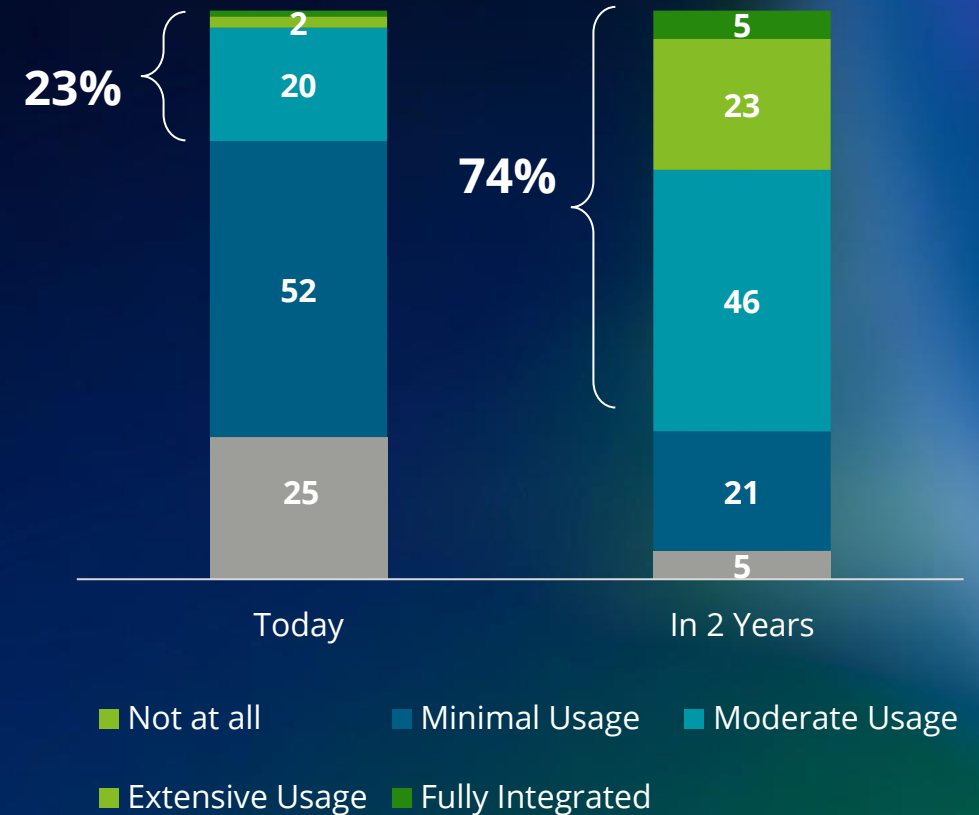
of finance leaders have **fully deployed** and already see those investments **delivering clear, measurable value**

Most wanted Finance team skills

Top skills development priorities



Extent of agentic AI usage



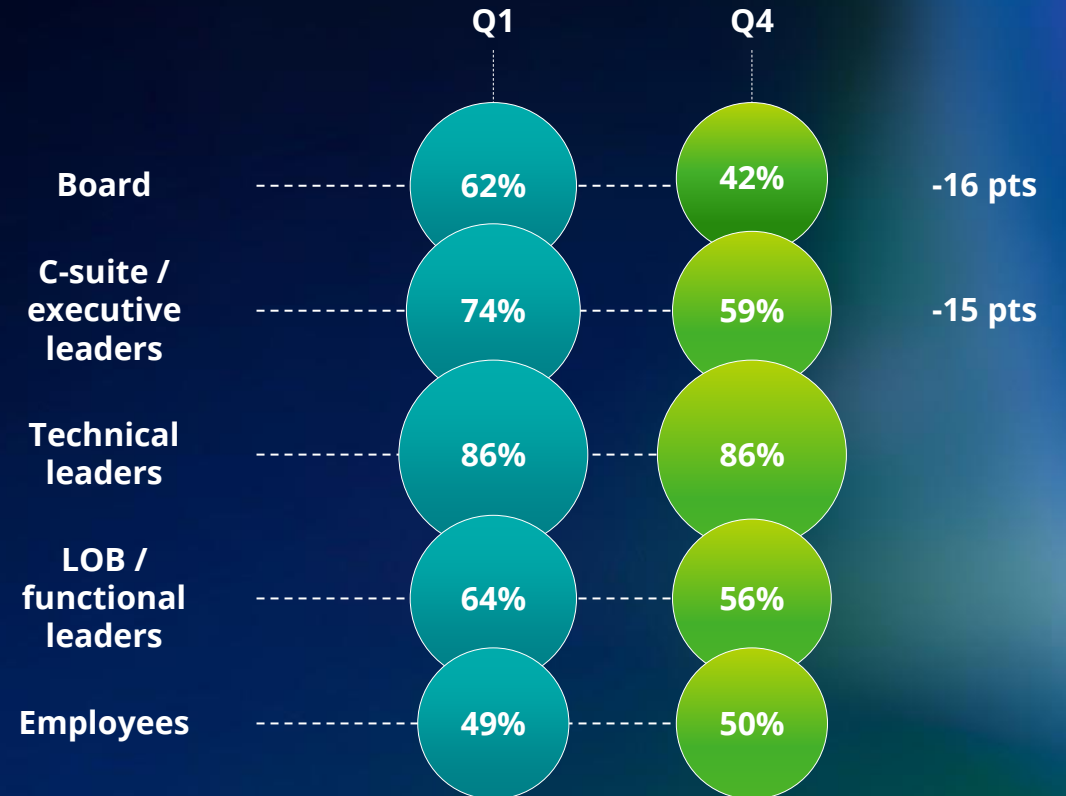
AI IS ALREADY HERE!

**AI agents are already
able to interact with
each other
transforming retail
optimization from
static rules to
collaborative
intelligence**

Turning "AI right Now!" into Measurable Value



Level of interest in Gen AI



"AI Right Now" [Comic]. Creator Unknown. Uncredited variation inspired by Allie Brosh's "Hyperbole & a Half" format. Source; LinkedIn

Our Learnings for AI integration in Finance

#5 LESSONS LEARNED

Integration vs Replacement

- Embedding into existing workflows = faster time-to-value
- Process redesign = greater long-term ROI
- Choose based on urgency vs. optimization priority

Data Quality Evolves WITH AI, Not Before It

- Build smart data infrastructure, not perfect data
- Governance matters more than data perfection
- AI can help with data optimization

Measure Full ROI

- Move beyond cost savings to holistic ROI metrics like speed to insights and trust
- Currently, only 21% of finance teams see measurable value from AI

Champion from the Top

- Active leadership is a key driver; projects with engaged leaders see 48% full integration vs. 18% with passive support
- Executive championship removes barriers and inspires confidence for successful transformations

Readiness Before Tools

- Rushing to technology without a prepared team leads to failed pilots
- Prioritize **strategic readiness** and **upskilling talent** for success

Agenda

Walk-in & lunch

12:00 – 13:00

- Opening and Introduction
Yvonne Daas & Naser Bakshi
- ABN AMRO Head of Controlling
Annemieke Roest on the State of GenAI / Risk, Governance & Strategic Adoption Practices
- Coca-Cola Hellenic Head of SSC
Kata Barariu and Simeon Denchev on Strategic AI Adoption in Finance SSC

13:00 – 14:35

Coffee Break

14:35 – 15:00

Breakout Sessions – Round 1

15:00 – 15:45

Breakout Sessions – Round 2

15:55 – 16:40

Panel discussion and closing

16:50 – 17:30

Networking – End of event

17:30 – 18:30