



## CFO Vision

**Peer circle discussion** - Advanced scenario planning and agility to boost resilience

**Nov 2025**

# Peer Circle Discussion: Advanced Scenario Planning and Agility

Finance's AI Evolution: Anchored in Data, Driven by Process, Empowered by People.

To build truly resilient finance functions, [CFOs are prioritising advanced scenario planning and agility](#). They recognise AI's critical role in augmenting talent and reshaping operating models, enabling them to navigate complexity and unlock strategic value.

## Defining advanced scenario planning

- **Strategic Question-Driven:** Centred on answering key business questions to ensure tangible output and avoid getting lost in "noise."
- **Value-Focused Outcomes:** Prioritises the strategic impact and quality of insights, aiming for material P&L improvements and demonstrable value, especially for rapid results.
- **Dynamic & Agile:** Fosters proactive, forward-looking dialogue with the business, enabling flexibility and a willingness to course correct.
- **Interconnected Understanding:** Involves grasping how different business factors and functions are linked to inform holistic planning.
- **People & Process Led:** Recognises that effective planning is primarily driven by human capabilities and operational efficiency, rather than just systems.

**Soundbite:** "What mattered in crisis situations, not volume but value of plans."

## Key obstacles to progress

- **Data Quality & Governance Deficiencies:** Fundamental issues with data quality, fragmentation, and poor processes, coupled with challenges in governance and access to ERP data, hinder effective planning and trust.
- **AI Maturity & Scaling Challenges:** AI tools and strategies are often perceived as emerging, lacking specific, tangible use cases, and organisations struggle to move initiatives from proof-of-concept to scaled, embedded solutions.
- **Investment Imbalance:** There's a tendency to over-invest in ERP tech, but under-invest in the EPM/FP&A space, limiting the ability to extract valuable analysis and insights from existing data.
- **Finance Lag in AI Adoption:** Leaders observe more rapid AI adoption in front-office areas (e.g., sales) than in Finance, highlighting a need for targeted finance-specific initiatives to catch up.
- **Skillset & Cultural Resistance:** Limited finance expertise in AI, self-limiting perceptions of its use beyond which of today's activities can be automated, and a struggle with cultural acceptance impede broader adoption and innovation.

**Soundbite:** "Without clean, well-governed data, scenario planning becomes noise rather than insight."

## Leveraging GenAI in Finance

- **Augmenting Talent:** Gen AI is seen as a tool to enhance the workforce by automating repetitive tasks, freeing finance professionals for higher-value work, rather than replacing them.
- **Decentralised AI Initiatives:** There's a growing conversation around spearheading AI initiatives "locally" without always waiting for top-down group directives.
- **Trust & Explainability:** AI outputs must be explainable and interpretable, with robust governance and human oversight to build confidence.
- **Organisational Readiness:** Requires upskilling finance teams, fostering cultural acceptance, and starting with targeted experiments to prove ROI.

**Soundbite:** "Transformation succeeds when the team can operate effectively within the new process, not when the system goes live."



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