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Unlocking FP&A Potential: The Transformative Power of Artificial Intelligence

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1 Introduction

Artificial intelligence (AI) is increasingly prevalent in our daily lives. Generative AI applications such as Siri, Gemini, and Alexa use algorithms to understand and respond to our voice commands. AI generates the predictive text, autocorrect, and personalized suggestions on our smartphones and laptops. Social Media sites use AI algorithms to curate content, suggest friends, and show targeted advertisements to users based on their behavior and preferences.

AI is also increasingly used within industry. In medicine it is used for image analysis and diagnostics, in finance for fraud detection and credit scores, in manufacturing to optimize maintenance schedules and material orders, and in the service industry to provide customer support. It appears that in the near future there will be no industry left unaffected by AI.

In alignment with this trend, our latest FP&A Trends Survey shows that while only 8% of organizations currently use AI or Machine Learning (ML) in finance, a massive 61% are planning to adopt these technologies in the near future. This marks a significant shift toward more informed, data-driven decision-making supported by enhanced financial analysis and accurate forecasting.

For the past 6 years, the Artificial Intelligence/Machine Learning FP&A Committee has tracked how the technology is being used within Financial Planning and Analysis. The group has discussed case studies from companies such as Microsoft, Philips, SWAROVSKI, SBB Cargo, PayU, Konica Minolta, and Egencia amongst others. Currently, the AI/ML FP&A Committee consists of over 60 senior finance practitioners and thought leaders from 18 countries representing a mix of companies, including Adobe, Microsoft, Dell, Vodafone, Lego Group, Deutsche Bahn, PepsiCo, and many others.

This paper draws insights from our discussions within the committee, as well as over 240 face-to-face International FP&A Board meetings globally, over 150 FP&A Trends Webinars, 22 AI/ML FP&A Committee meetings, and over 2400 global FP&A Trends Survey respondents. It offers practical guidance on how AI can be used within FP&A and gives details of what is currently being achieved, how obstacles in AI adoption have been overcome, and a glimpse into the future.

Our aim is to encourage FP&A teams in all organizations to investigate and embrace this game-changing technology. This technology will redefine the role of FP&A and shape how AI-driven insights impact organizational decisions.

What is Artificial Intelligence/Machine Learning (AI/ML)?

Artificial Intelligence (AI) refers to the development of computer systems to perform tasks that typically require human intelligence, such as learning through experience, reasoning, problem-solving, understanding natural language, and pattern recognition.

Machine Learning (ML) is a subset of AI, centered around algorithms, effectively a set of instructions for the computer to follow when analyzing data. These rules are not static. They continuously evolve based on previous outcomes, thereby enhancing future performance.

2 The FP&A Toolbox

FP&A has several technology-based tools, which enable the activities of planning, analysis, and reporting.

Firstly, there is a group of traditional tools that have been available for over 20 years, including (Figure 1):

Figure 1.
The Traditional Toolbox

1. **Data Management** to collect, validate, and format data ready for analysis.
2. **Financial Modeling** to build models that mimic how the organization operates and the effect of decisions on key financial statements.
3. **Report Generation** to create and distribute analyses and dashboards that can be appropriately tailored to stakeholders.
4. **Process Control** that determines the order in which plans are created, validated, and approved, and clarifies what each stakeholder can see and do.
5. **Analytics** that provide detailed ad-hoc analyses in response to questions and investigations.

There are a few technologies underpinning these traditional tools. According to the 2023 FP&A Trends Survey, Excel remains the dominant planning tool for 52% of respondents, while 21% of respondents use older systems or accounting system modules.

In recent years, FP&A departments have had access to an **additional range of tools based on AI and ML.** These tools are described as additional since they enhance traditional tools, rather than replace them.

AI/ML-based tools involve algorithms that, unlike the traditional tools, learn and adapt over time to automatically improve performance. For FP&A purposes, AI/ML algorithms consist of the following three types (Figure 2):

Figure 2.
The AI/ML Toolbox

1. **Forecasting.** These algorithms analyze data at a detailed level, looking for patterns and trends that are then used to predict future values of selected variables. Predicted values can be passed into a traditional finance model to produce a consolidated budget and/or forecast.
2. **Driver Identification.** These algorithms look for dependencies within a range of both internal and external data, without human guidance, and identify which measures directly affect performance. The resulting ‘drivers’, as they are known, can then be used within AI/ML forecasting algorithms and traditional finance models to predict outcomes for the organization.
3. **Generative Language.** These algorithmic models, such as those found in ChatGPT and Gemini, can process voice and text queries to provide narratives and guidance. They are becoming common in call-center-type activities and are set to augment finance support staff in handling user requests.

Each algorithm mentioned has inputs, which are then processed, according to a set of rules embedded within the tool, to produce outputs. Within traditional tools that processing is typically defined by FP&A, but within AI/ML tools it tends to be seen as a ‘black box’.

3 Integrating AI/ML and Traditional Tools

FP&A departments oversee an organization's planning to ensure completeness, realism, and efficiency. This includes strategic planning at the corporate level to set the long-term vision and objectives. These are then translated into tactical plans, and resources are allocated to individual departments. Tactical plans, in turn, are linked to operational plans that support day-to-day activities such as scheduling, human resources, and supply and demand planning.

Other plan types affected include CapEx projects and contingency planning which both need to be carefully coordinated if the organization is to achieve its objectives efficiently.

So, where does AI fit into this mix?

To fully appreciate this, let's look at the annual budgeting process using only traditional tools (Figure 3).

The process may start with a **financial model** that is used to set targets for next year based on the current year's forecast. These targets are then communicated to the divisions, and they enter their preferred expenditure **(Data Management)**, which, after approval **(Process Control)**, is sent and consolidated by the group team **(Financial Modeling)**. After review **(Report Generation)**, revised targets may be sent out, and budget alterations agreed **(Data Management and Process Control)**. Once adjusted, the budget is then published **(Financial Modeling)**, and actual performance figures are reported each month in comparison to the budget **(Report Generation)**. Once the financial year starts, revised forecasts are collected **(Data Management and Process Control)** and reports produced **(Financial Modeling and Report Generation)**. Results are analyzed to assess performance and identify areas where improvements can be made **(Analytics)**.

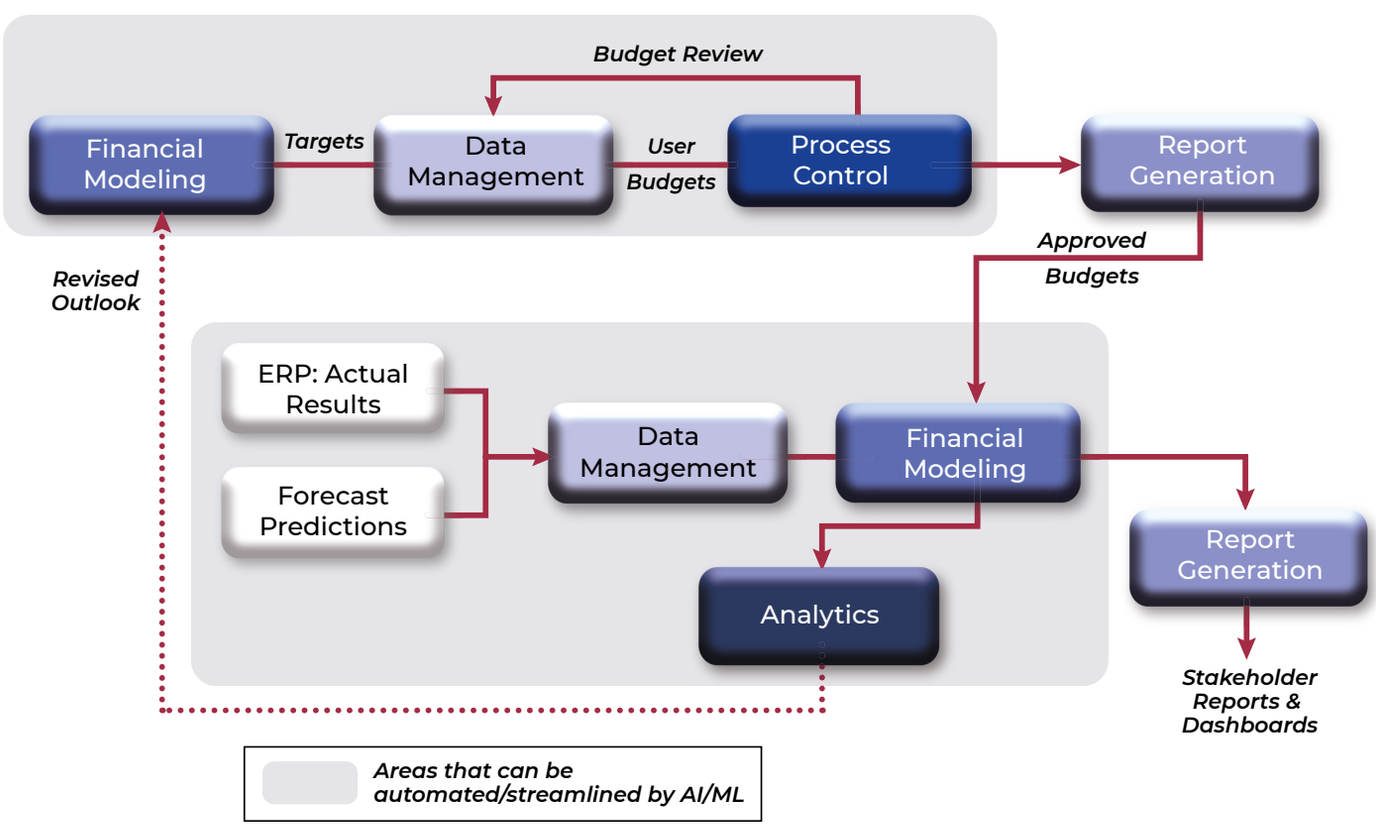

Figure 3. How Budgeting Can Be Enhanced with AI/ML Tools

Our surveys reveal that this 'traditional' process takes time and involves a significant amount of resources.

However, integrating AI/ML tools can revolutionize the entire process. For instance, in the above example, **Forecasting** algorithms can be used with driver-based models to automate tasks such as target setting, budget generation, and forecasting. Algorithms may initially be targeted at one of two areas, such as customer churn or product sales, while still allowing users to make adjustments. This approach not only saves time but leads to establishing more realistic goals.

However, it is not simply the budgeting process that can be improved. AI/ML technologies enable different parts of the planning process to be completed faster and with greater accuracy, whether that be demand planning, supply chain optimization, or CapEx allocations. This includes making use of **Driver Identification** AI/ML algorithms to determine the main factors that affect performance and their evolution over time. These factors can remain hidden when using traditional tools.

Similarly, **Generative Language** AI tools can not only enhance an employee's ability to draft and edit text but also to summarize, simplify, and classify content. They can be used to respond to human requests, to select and analyze data, and to provide commentary on results that may impact future decisions.

The point we are trying to make is that the FP&A tool kit just got larger and more powerful. Adopting AI/ML will transform what FP&A teams do. It is something that cannot be ignored. But before we get carried away, let's take a look at what is being achieved today using AI/ML tools.

4 Use Cases

In recent surveys[1], the main advantage stated of using AI/ML tools for predictive planning over traditional FP&A methods, is its ability to reduce human bias while increasing data-driven insights (49%). Other advantages include increasing the speed of the planning process (27%), making the process more accurate (18%), and automating data entries (6%).

When AI/ML tools are used for forecasting, our 2023 FP&A Trends Survey found that 61% of organizations rate their forecasts as excellent or good. This is a significant jump compared to the 39% forecast satisfaction rate expressed from companies not using AI/ML. The difference - 22% - highlights the added value AI/ML technologies can bring to forecasting accuracy.

We also find that companies with AI and ML tools tend to make more decisions using data - 7 out of 10 of these companies do so. In comparison, only 5 out of 10 non-AI/ML companies use data to the same extent for their decisions. This suggests a strong link between the use of AI/ML technologies and a higher likelihood of data-informed decision-making.

This correlation is almost certainly due to the increased accuracy and speed that comes from using AI/ML. Nonetheless, we would stress that management intuition and business acumen are still required to interpret AI/ML predictions.

Using AI/ML technology has caused a significant improvement in performance across a variety of areas, as witnessed in the following case studies.

> **Revenue forecasting:** A company we spoke to in the payments industry had issues with their traditional bottom-up forecasting process, where predictions typically deviated from actual performance by over 5%. To tackle this, they formed a small team, led by an FP&A Data Scientist, combining AI/ML expertise with financial knowledge. This team centralized data into a single repository, using 18 months of data to train and predict the next 6 months. They experimented with various external drivers to enhance accuracy. After 3 months of development, they built a successful prototype that produced predictions with less than 2% error and reduced the forecasting timeline to only one day.

[1] Combined LinkedIn and the FP&A Trends Webinar survey with 276 responses

Customer retention: By looking at purchase history and online activity, companies within the consumer-packaged goods (CPG) industry have been able to identify the customers who are potentially on the brink of leaving. Coca-Cola reported that with their AI-driven systems they can enact proactive strategies that can cause a 5% decrease in customer attrition.

Enhanced reporting process: A leading manufacturing company within Europe relies on AI to enhance their financial reporting processes. Through the implementation of AI technologies, they have created interactive dashboards that enable FP&A professionals to identify financial trends and make well-informed decisions. The company attributes a notable 10% improvement in their financial forecast accuracy to the use of AI.

Improved Production Capacity: Biobest Group, a leading global company in integrated pest management, faced challenges with long production times (up to 16 weeks) and fluctuating yields due to the biological nature of their products. To streamline the process, they shifted from a decentralized to a centralized approach, where subsidiaries needed to input forecasts into an integrated planning system. An algorithm then allocated production capacity centrally, optimizing output for each production site and planning unit. The company is now developing real-time reporting on market and product prices and setting future budgets.

There are many other examples we could mention, but there is not enough space in this paper. Yet, the case for AI is clear – organizations that use AI are able to significantly improve performance.

5 Levels of AI/ML Adoption

When approaching AI, FP&A departments typically go through several levels of adoption. Each level is more sophisticated and builds on previous experiences (Figure 4).

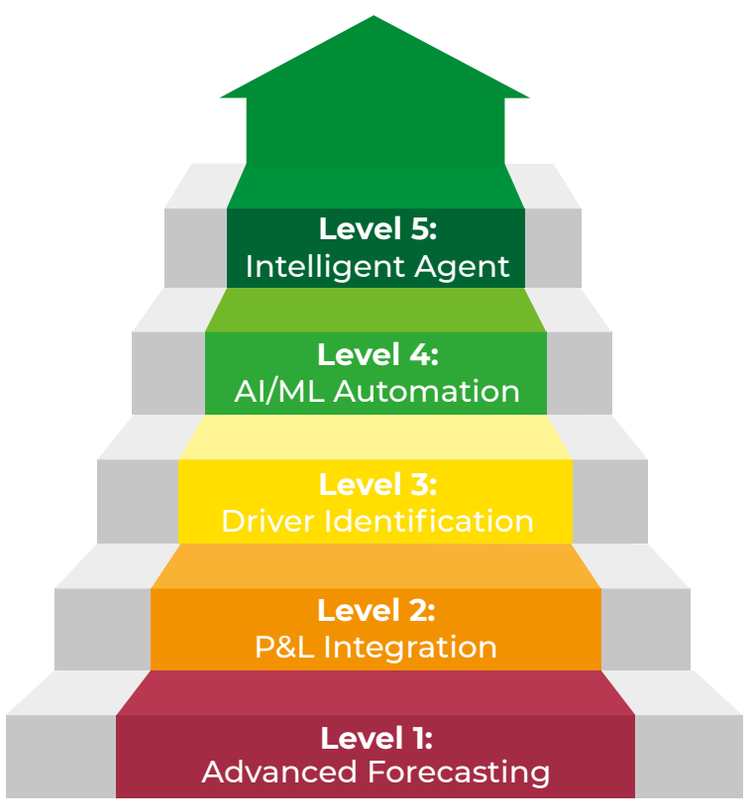

Figure 4. Five Levels of AI Adoption within FP&A

Level 1: Advanced Forecasting

This is where most AI applications within FP&A start. It involves the creation of a pilot project that will act as a 'proof of concept'. This typically looks at one line of the business, for example, the sales revenue for one business area. The project team usually consists of around 3-5 people with a mixture of business and data science expertise. The team may be enhanced by experts outside of the organization. In addition to identifying the value AI can generate, the project also helps pinpoint technology requirements, skill gaps, and any data issues that will need to be dealt with.

Level 2: P&L Integration

Having successfully predicted one or two P&L items for a region, organizations then apply AI/ML to other significant P&L items across the whole company. Results from the AI/ML technology are dynamically linked to driver-based models that are then able to produce a full P&L statement with a connected balance sheet and cash flow statement. At this point, organizations tend to bring AI/ML expertise in-house who provide training to stakeholders to help demystify how the algorithms work.

Level 3: Driver Identification

At this level, AI/ML is used to identify drivers, some of which may be hidden and could never be revealed by the human brain. Internal and external data are combined, and the system, through the use of unsupervised algorithms, reveals potential correlations. To be successful, the organizations that we spoke to said it was important to combine the skills of a data scientist with someone who understands the business completely. That way, the potential drivers and their relationships can be fully corroborated.

Level 4: AI/ML Automation

This next level of AI/ML maturity is where the technology is used to automate processes. We know of one company that monitors production equipment and energy supplies in real-time through attached sensors. From the information these sensors provide, AI/ML is used to automatically optimize energy usage and determine maintenance schedules, which are then fed into the overall company plan. This not only lessens the risk of unexpected equipment failures but also makes the most efficient use of resources.

Level 5: Intelligent Agent

The final stage of maturity, within the FP&A AI/ML evolution, involves the adoption of intelligent agents who can help streamline the numerous manual tasks that take up most of the FP&A team's efforts. Presently, FP&A teams spend approximately 80% of their time on manual activities, such as data cleaning, report generation, manual analysis, and team coordination. The integration of AI systems, equipped with intuitive user interfaces, will bring significant transformation to finance processes. By automating time-consuming tasks, AI enables FP&A professionals to redirect their focus toward more critical functions such as analysis, financial reasoning, and decision-making. All of this combined enhances the overall productivity and strategic impact of the FP&A team.

6 Overcoming the Barriers to AI/ML Adoption

As with any new technology, there are barriers to overcome, and working practices that need to change if benefits are to be realized. Our surveys reveal the five common barriers companies face in AI adoption – skill, data, time, technology, and confidence (Figure 5).

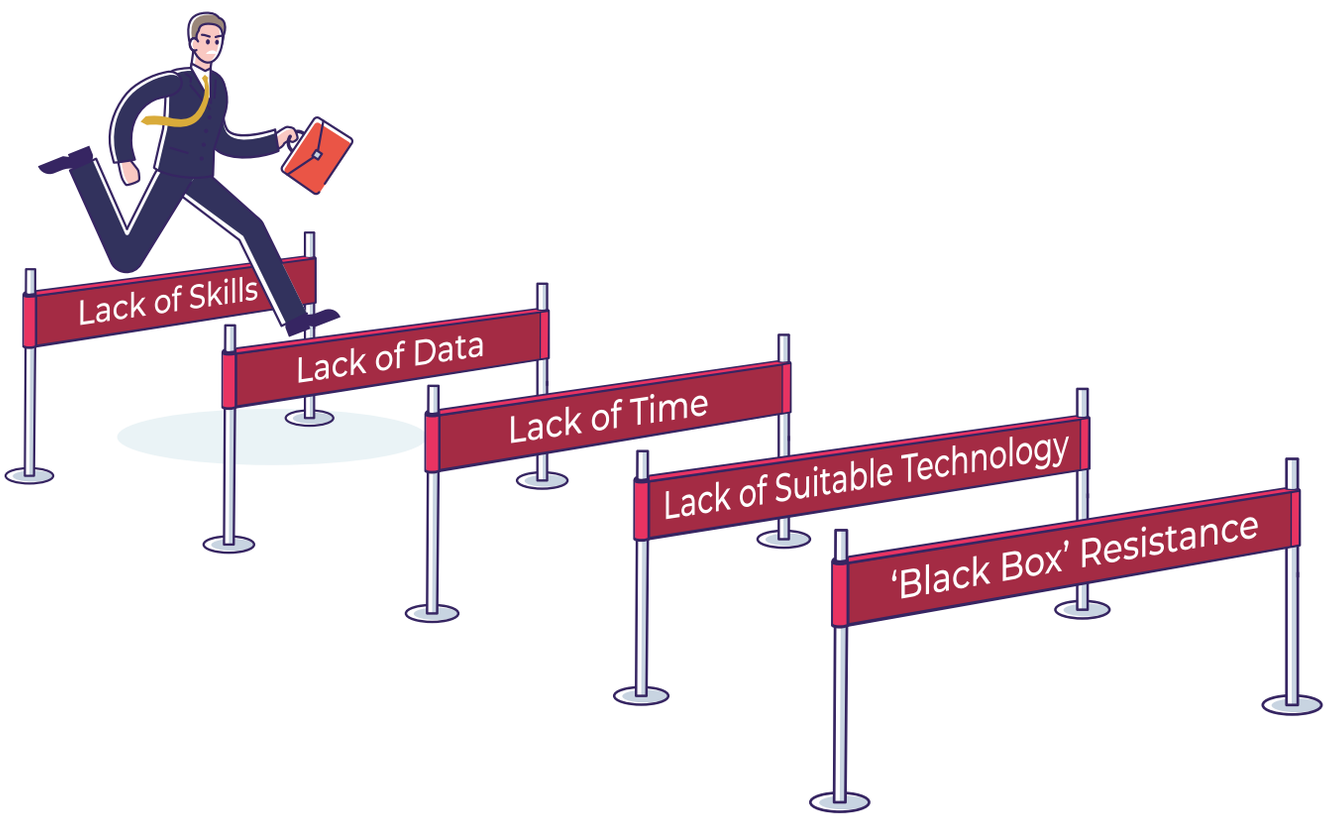

Figure 5. Five Common Barriers to Using AI within FP&A

Lack of Skills

FP&A personnel are typically grounded in financial accounting and are proficient in financial modeling, data analysis, and the use of spreadsheet tools like Microsoft Excel. However, AI has its roots in computer science, linear algebra, differential calculus, statistical probability, and technical programming – areas that are typically outside of FP&A training.

To use and take advantage of AI/ML, FP&A team members need to be multi-skilled. In previous research, we described in detail the important FP&A roles that now exist. The Analyst, Architect, Data Scientist, Storyteller, and Influencer.

For this paper, we would like to stress the role of the FP&A Data Scientist, who acts as a vital bridge between the functions of finance and data science. They are skilled in using predictive technologies, such as AI/ML, to uncover key analytical drivers and trends that can be used in planning models. This role does differ from a traditional Data Scientist role in that they have a finance and FP&A background. They, therefore, understand both functions and can create processes and collaborations that work. The FP&A Data Scientist is also responsible for extracting, cleansing, organizing, combining, analyzing, and presenting data to help executive decision-making.

Lack of Clean, Relevant Data

Without clean, accurate, and timely data, any analysis will be flawed. In our 2023 FP&A Trends Survey, the biggest obstacle facing FP&A was the lack of a single source of data that everyone trusted. Next was the complexity of the data, followed by inconsistencies within the data (Figure 6).

Figure 6. Data Issues that Hamper FP&A

Gizelda Ekonomi, Senior Manager of Vodafone, a specialist in Financial Planning Transformation, stresses the importance of not overlooking the essential prerequisites of data quality and quantity when aiming for pertinent and significant machine learning outcomes. She explains that to make a simple time-series forecast, with next month accuracy of around 97%-99%, their business required a minimum of 24 months of clean data.

To minimize data issues, we recommend that AI is first used in just one area of the business where data is available. This will probably still involve data cleaning and definition clarification for the period chosen. For some of the people we interviewed, this process can take up as much as 70% of the effort expelled.

Lack of Time

Time, or rather the lack of it, is a perennial barrier to innovation. To learn something new or to try out different techniques will cost time, which often means giving something else up. **Gizelda Ekonomi** comments that in using AI/ML, the FP&A team needs to be prepared for failure. "Through a trial-and-error approach", she continues, "teams learn and understand data behaviors and interdependencies. Only by doing so and celebrating this learning can the delivery of valuable and customer-centered outcomes be accelerated."

Evaluating the use of AI is not a part-time project. However, most people we spoke to saw positive results within 3-6 months. Overcoming this obstacle starts with pinpointing a segment of the business that is difficult to predict or one where improved predictions could significantly impact the bottom line. Once identified, it is crucial to assess the availability of relevant data and gather input from stakeholders regarding the potential performance drivers. Subsequently, a project can be outlined, including the necessary resources and the potential benefits if the project proves successful.

Lack of Suitable Technology

Until just a few years ago, the primary avenue for accessing AI capabilities was through technical programming. Many early FP&A adopters turned to languages such as Python, leveraging its extensive ecosystem of libraries and frameworks, and facilitated the implementation of machine and deep learning algorithms.

Fortunately, today AI capabilities are increasingly available as part of modern planning platforms, which eliminate much of the need for programming. However, they still require an understanding of the algorithms and an ability to interpret results.

Our latest FP&A Trends Survey shows that teams using AI are swaying toward modern cloud-based platforms, with 35% (up from 22% in 2021) of teams using them. At the same time, we see the use of spreadsheets diminishing with only 15% of teams using them (compared to 36% in 2021), as spreadsheets typically cannot handle the detail or complexity involved in AI analyses (Figure 7).

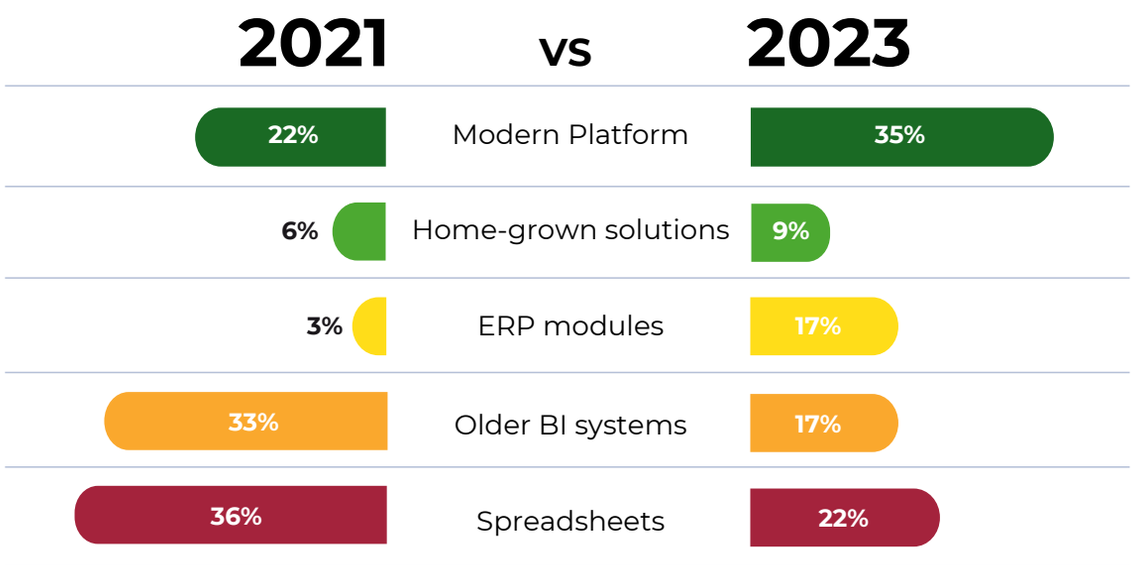

Figure 7. Main Type of Application in Use by AI/ML Users

'Black Box' Resistance

At our different FP&A Board and AI/ML FP&A Committee meetings, we often hear of resistance to using an AI 'Black Box'. This lack of understanding leads to a lack of trust in the results produced.

Interestingly, in a survey on leadership attitude toward the use of AI/ML-based forecasts, 16% of leadership embraced their use, with a further 54% curious about what could be achieved. Only 5% rejected its use completely, leaving 25% skeptical[2]. Overcoming this concern requires more visibility of the models/algorithms used, along with education that will demystify AI.

Christine Fromont, CFO of Hôpital de La Tour, comments that the success of AI-generated forecasts hinges on the trust they inspire within the organization. To achieve this, she recommends displaying AI predictions alongside actual figures and highlighting the deviation. This will demonstrate the reliability of the AI predictions and instill confidence in their accuracy. To further bolster trust, she suggests publishing AI-generated forecasts 12 months prior to their use in a budget cycle. "This allows ample time to fine-tune the models and build confidence in their efficacy." She continues this point by saying,"consider allowing teams to challenge the AI forecast through a bottom-up approach in the first year. Once they witness the sensible results, they will trust the model and become more receptive to the targets they receive."

7 The Future AI-Enabled FP&A

Research by McKinsey[3] found that as much as 89% of FP&A activities could be automated. Automation not only improves reliability and speed but also frees up FP&A time to focus on higher-value activities.

In the future, an AI-enabled Financial Planning & Analysis (FP&A) department will operate with a significantly enhanced competency to analyze data, predict outcomes, and provide actionable insights to support strategic decision-making.

[2] The FP&A Trends Webinar survey on leadership attitude to AI/ML-based forecasts

[3] https://www.mckinsey.com/capabilities/strategy-and-corporate-finance/our-insights/bots-algorithms-and-the-future-of-the-finance-function

Key to this transformation are Generative AI applications that will increase productivity and accelerate decision-making. These applications will maintain a 360-degree view of the business that will allow the planning process to automatically identify and pursue opportunities that lead toward optimal outcomes.

In a future that's already here, AI applications will serve as the interface for:

Automated Data Integration: On a scheduled or continuous basis, AI algorithms will gather, integrate, and clean data from various internal and external sources, including financial systems, CRM platforms, market databases, social media, and economic indicators. This automation will further reduce manual effort and improve data accuracy.

Predictive Modeling and Forecasting: Models will, on demand, forecast key metrics such as sales, revenue, expenses, and cash flow within different scenarios. They will incorporate historical data, market trends, seasonality, and other relevant factors to generate more accurate forecasts.

Scenario Analysis and Sensitivity Testing: Business scenarios will be conducted on-demand to assess their potential impact on financial performance. For example, to evaluate the effect of different pricing strategies, market demand changes, or alternative cost structures on profitability.

Real-Time Reporting and Dashboards: Real-time reporting dashboards, that offer insight into current financial performance and KPIs, will be created. Dashboards will be customized to stakeholder needs, allowing them to focus on the metrics that are most relevant to their roles. Alerts and notifications, that flag any significant deviations from expected outcomes, will automatically be sent to stakeholders.

Optimized Resource Allocation: AI algorithms will help optimize resource allocation by identifying areas where investments are likely to yield the highest returns. For example, identifying which marketing campaigns have been most effective in driving sales and, therefore, recommending the marketing budget allocation accordingly.

Overall, an AI-enabled FP&A department of the future will play a more strategic role in decision-making processes. They will operate with greater agility, accuracy, and provide executives with data-driven recommendations that help leadership teams make more informed decisions and achieve corporate goals more effectively.

> The age of AI has dramatically impacted the role of FP&A leaders. They must adapt to the new realities of data-driven decision-making, embrace new technologies, and develop their leadership skills to drive success. By doing so, they can help their organizations remain competitive and thrive in the ever-changing business landscape.
>
> **Christian Martinez, Finance Analytics Manager (Product Manager) of Kraft Heinz**

8 Conclusions and Next Steps

> AI/ML will fundamentally shift the role of profiles in FP&A.
> **Michael Nudelmann, Director Controlling / Head of Corporate FP&A of SWAROVSKI**

The use of AI/ML within FP&A is here, and it will become even more pervasive over the next few years. In our last annual survey, the CPG and Retail sector emerged as the primary industry for integrating AI into FP&A, with 28% of surveyed companies. The Information and Communication sectors were next at 11%, closely followed by Financial Services, and Admin sector at 10%.

While the overall adoption rate was relatively low, our survey showed that around 60% of the following industries would be investigating the use of AI/ML within FP&A over the next 12-18 months: Utilities, CPG and Retail, Healthcare, and Manufacturing.

We believe that this dramatic rise in planned usage is due to:

- A recognition that traditional tools are inadequate for the detail and complexity of current planning needs.
- The success early adopters are demonstrating with AI.
- The huge investments made by major technology companies, particularly in Generative AI, that will spill over into every organizational activity.
- Recent announcements made by many planning vendors that they will embed AI tools within their platforms.

The latter point will make it easy for FP&A departments to investigate ways they can benefit from AI's predictive power and leverage its generative capabilities to interact with users. Consequently, it is becoming more imperative that FP&A departments start their AI journey now or risk being left behind in their ability to support the organization that they serve.

Dr Stylianos Kampakis, CEO of the Tesseract Academy, refers to this change as not merely a technological evolution but a strategic revolution. However, this revolution within FP&A cannot be achieved without getting the foundations right. The foundations being clean master data, harmonized processes, and the right technology, backed by senior management support and a re-skilled FP&A team.

Our latest FP&A Trends Maturity Model contains key steps and strategies that will lead FP&A transformation in this new AI-invasive world. These steps include:

- A consideration of the levels of adoption outlined in this paper and stock take of where the organization is today. From this a company can start to develop plans that will take them to the next level of adopting AI/ML.
- Obtaining a buy-in or level of support from top management and communicating the benefits nd potential impact of an AI/ML approach on the business.
- Engaging and working closely with other departments, such as sales, marketing, and operations, to investigate which areas may benefit from AI/ML. For most organizations, this will involve setting up a pilot project to investigate the use of AI/ML and determine the levels of training and new skills that will be required.
- A consideration of moving planning activities to a modern planning platform that has embedded AI capabilities and therefore supports integrated planning.

The need for FP&A Transformation is inevitable. The question is whether FP&A is prepared to embark on that journey today.

9 Acknowledgements

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Michael has over 40 years of experience in designing and implementing software solutions that improve the efficiency and effectiveness of planning.

He has conducted senior management workshops with leading organizations around the world and the author of many articles and books. His latest, 'Budgeting, Planning and Forecasting in Uncertain Times' is published by John Wiley & Sons.

Larysa Melnychuk, CEO and Founder at FP&A Trends Group

Larysa is an accomplished FP&A professional and thought leader with over 20 years of experience in senior finance roles at top-tier companies. In 2016, she founded the FP&A Trends Group, a global organization that offers valuable insights, advisory services, and training to finance professionals seeking to stay ahead of the curve.

Larysa founded the International FP&A Board, chairs the Global AI/ML FP&A Committee, and runs a number of high-profile initiatives in the area of modern financial analytics.

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FP&A Trends Research Paper 2023: Maximising Potential: Unleashing the Power of Predictive Planning & Forecasting within xP&A

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