



CFO • FINANCE CONTROLLER • CIO ROUNDTABLE

AI Roundtable

CFO imperatives - Driving AI adoption for finance organization



AI and the Future of Finance: An Executive Roundtable

Why This Room

CFOs, CIOs, and Finance Controllers have gathered to explore how AI can reshape Finance, strengthen decision-making, and support the broader business agenda.

Why Now

AI is moving from experimentation to enterprise adoption. The priority for Finance is to identify where AI can create meaningful value, what capabilities are required, and how adoption can be scaled responsibly.

What You Leave With

- A clear perspective on the evolving AI agenda for Finance
- Practical examples of AI-enabled finance use cases, through Live Demo
- Peer insights on moving from pilots to scaled adoption

The Flow Of The Evening

- 5:15 ● Welcome and setting up the context
- 5:25 ● Global AI trends from Silicon Valley
- 5:50 ● The adoption of AI in finance
- 6:15 ● *Tea & networking*
- 6:30 ● AI for finance in action: live demonstrations
- 7:00 ● The practitioner's perspective — CFO panel
- 7:30 ● Networking & dinner

An executive dialogue focused on moving from AI ambition to measurable impact in Finance.

SECTION 01

The Silicon Valley Signal

From the West to the World

The United States is no longer debating whether AI will transform enterprise operations — it already has. The question now is how the rest of the world absorbs, adapts, and leads the next chapter.

CURRENT FOCUS
United States

EVOLVING TO
India & Global Markets

CRITICAL SHIFT
P&L for Agents - Tokenomics

HORIZON
2026 – 2030



The four stages of enterprise AI migration

Where are you — and where do you need to get to?

USA
Stage 3 – 4

CHINA
Stage 3 – 4

UK / EU
Stage 2 – 3

SEA / GCC / ME
Stage 1 – 2

INDIA
Stage 1→3 Fast

STAGE 01



Exploring the Art of Possible

Sandboxed pilots, disconnected from core ops. Value is anecdotal. The board is watching.

STAGE 02



How Do We Get Deterministic Results?

Attention shifts from creativity to reliability. Prompt engineering matures into structured orchestration.

STAGE 03



Guardrails & Data Sovereignty

Governance frameworks go live. Where data lives, who owns outputs, and EU AI Act / India DPDP force architecture decisions.

STAGE 04



Ensuring AI Delivers the Promised ROI

The Promoters and Board demand accountability from the CFO. Cost-per-outcome metrics, productivity dashboards, and HITL operating models.

The rise of quick-serve AI products

Pre-configured, domain-specific, deployed in days — not quarters

1 Deploy in Days, Not Quarters

Pre-configured, domain-specific agents that go live in days — a contract summary, a control test, a revenue schedule.

2 Thin Configuration, Deep Value

Wrap a foundation model with domain schemas and validation rules. Clients configure outcomes without touching the AI.

3 India as the Quick-Serve Factory

India's engineering depth and frugal innovation culture makes it the production center for quick-serve AI — inventing for domestic and global export.

4 Iteration is the Product

Weekly cycles — output quality monitored, edge cases captured, models refined. Managed services, not one-time implementation.

5 Composability over Monoliths

Modular architecture: a revenue recognition agent plugs into ERP, contracts, and reporting without replacing any existing system.

6 Pricing Shifts to Outcomes

When an agent completes in seconds what took hours, the value is the outcome — not the effort. Consulting moves to consumption-based fees.

A Multi-Dimensional Framework for AI Value

01 Financial ROI

Direct impact on the bottom line through fiscal discipline.

- Hard Cost Savings
- Revenue Uplift
- Reduced Run-Rate
- Avoided Hiring Costs

02 Operational ROI

Efficiency gains that transform the operating model.

- Process Speed & Velocity
- Throughput per FTE
- Quality & Accuracy
- Cycle-Time Reduction

03 Risk & Strategic

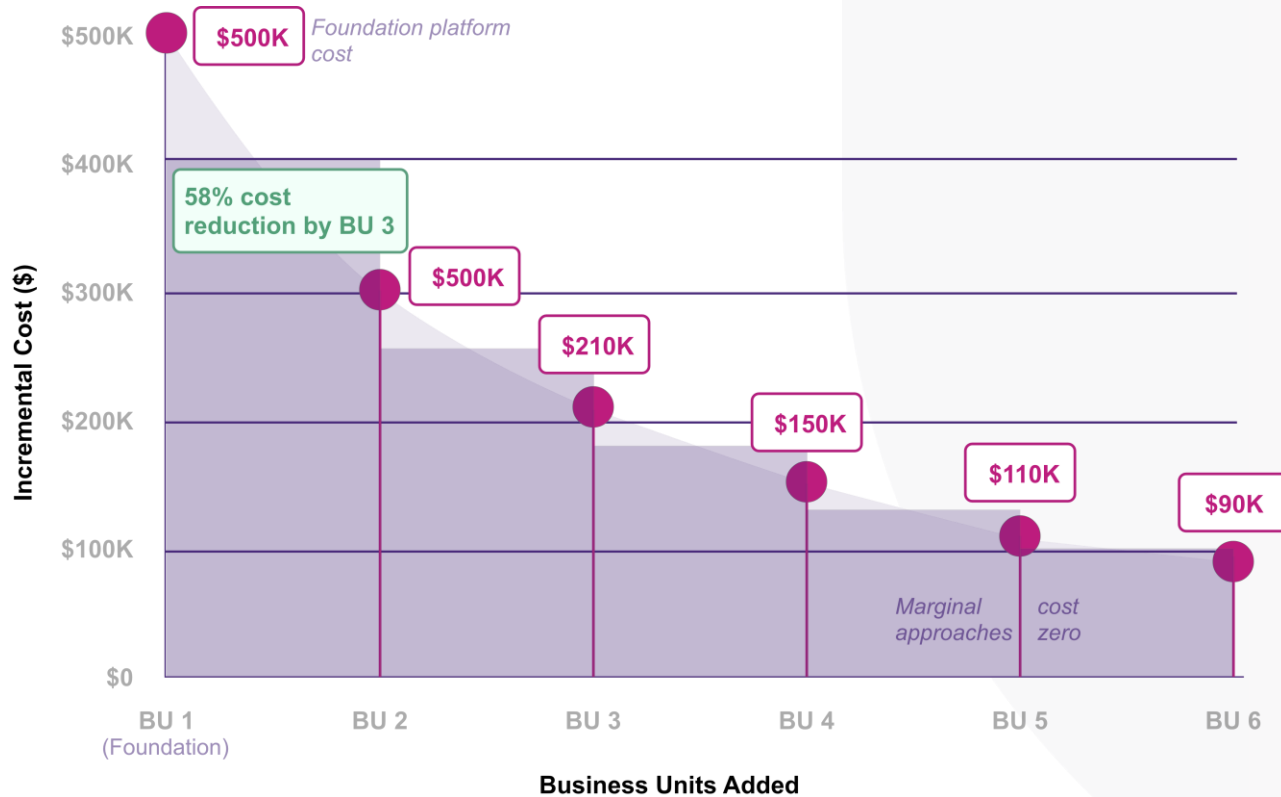
Long-term resilience and competitive advantage.

- Compliance & Fraud
- Decision Advantage
- Business Resilience
- Strategic Positioning

Framework aligns AI impact with standard finance and board-level language.

Diminishing Incremental Costs as You Scale

Each new Business Unit added to the Agentic platform costs significantly less than the one before — foundational investment is shared



01 Shared Foundation

The largest cost is the initial platform deployment: infrastructure, integrations, security, and governance. Every subsequent BU shares this foundation at near-zero marginal cost.

02 Reusable Agent Library

Agents built for BU 1 are reusable and configurable for every additional BU. Each new deployment reuses 60–80% of existing agent logic, dramatically compressing build costs.

03 Economies of Scale in Operations

Training, change management, and ongoing support effort per BU falls sharply with each deployment as institutional knowledge accumulates and processes standardise.

04 The Tipping Point

By BU 3–4, the cumulative value of automation typically exceeds total platform investment. Every BU added from this point generates pure operational ROI.

The platform is a one-time strategic investment. Each additional BU delivers exponentially greater value at a fraction of the original cost.

Measuring ROI: A Three-Dimension Framework

Hard quantitative benefits · Soft qualitative benefits · Cost of delay in automation deployment

Hard / Quantitative

Directly measurable financial impact

● Contract & Outsourcing Cost Reduction

Measure FTE and contract labor costs before vs. after automation. Typical reduction: 30–60% of outsourced process costs.

● Error & Rework Elimination

Track error rates and rework costs in automated vs. manual workflows. Defect costs often drop 70–90%.

● Audit & Compliance Cost Reduction

Measure hours and fees spent on audit preparation, evidence gathering, and remediation before and after automation.

● Cycle Time Reduction

Quantify days saved in financial close, invoice processing, and reconciliation cycles. Convert to \$ value using fully-loaded cost rates.

Balanced / KPI-Linked

Metrics that link to financial outcomes

● Net Promoter Score (NPS)

Track employee and customer NPS before/after automation. Correlate NPS improvement to retention, referrals, and revenue.

● Process Throughput / STP Rate

Measure straight-through processing rate (target: 80%+). Higher STP directly reduces labor and error costs.

● Audit Finding Reduction

Count and classify audit findings pre/post. Reduction in findings correlates directly to lower remediation costs and risk exposure.

● Reporting Timeliness

Measure days to close, report delivery time, and variance narrative turnaround. Faster reporting improves decision quality.

Soft / Qualitative

Strategic and experience-based value

● Operational Velocity

Subjective assessment of team agility: speed of adapting to new BUs, entering new markets, or responding to regulatory change.

● Employee Experience

Survey scores on task satisfaction, cognitive load, and time spent on high-value vs. low-value work. Links to attrition reduction.

● Compliance Risk Avoidance

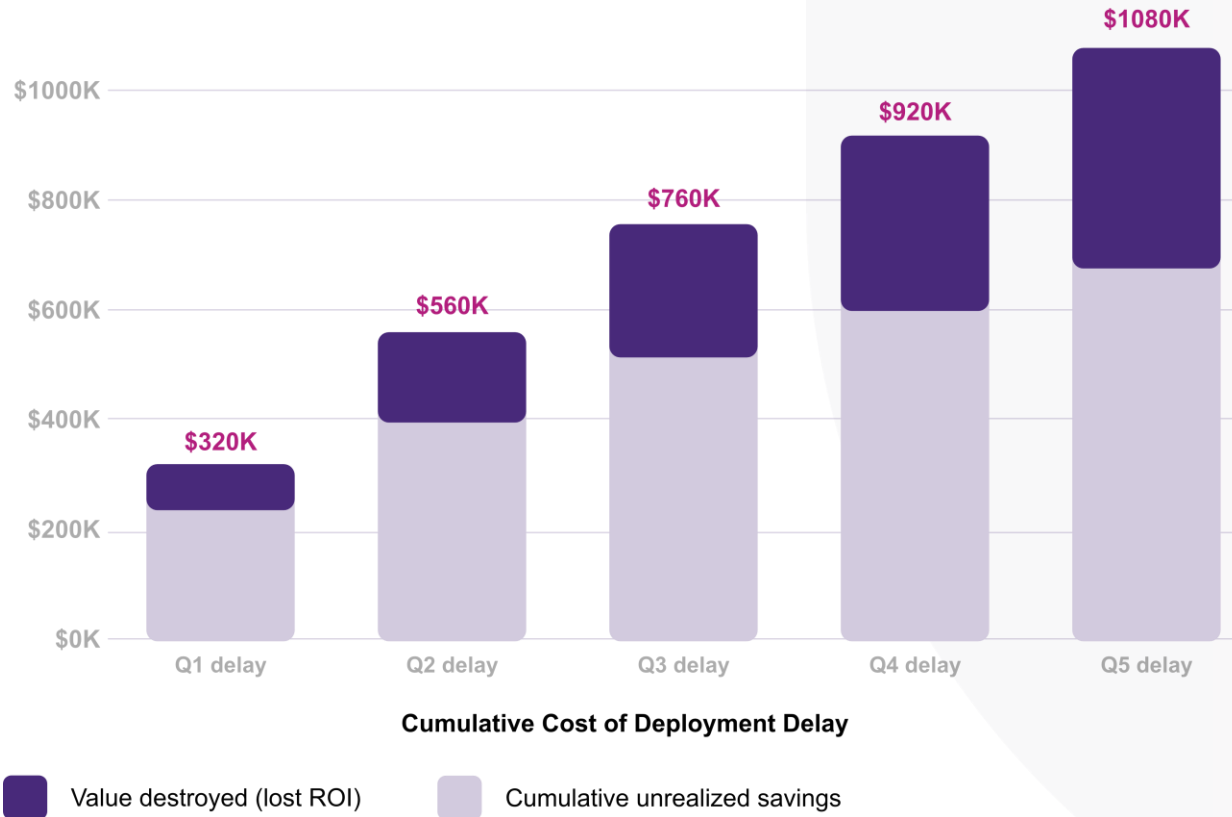
Quantify the cost of potential fines, penalties, and reputational damage avoided through continuous SOX compliance monitoring.

● Talent Redeployment

Track FTEs redeployed from manual tasks to strategic work. Value the uplift in output quality and team capability.

The Cost of Delay: Every Quarter Matters

Delaying automation deployment is not a neutral decision — it has a quantifiable financial cost



- 01 Continued Manual Labor Cost**
 Every quarter without automation means continued FTE and contract labor costs for processes that should be automated. A \$500K/year process costs \$125K per quarter of delay.
- 02 Compounding Audit Risk**
 Each delayed quarter without automated SOX monitoring increases the probability of an audit finding. A single significant deficiency can cost \$200K–\$2M in remediation.
- 03 Lost Competitive Velocity**
 Competitors deploying automation gain 20–40% faster cycle times. The operational gap widens every quarter that deployment is deferred.
- 04 Opportunity Cost of Analyst Time**
 Finance and compliance staff locked in manual processes cannot contribute to strategic work. Conservative estimate: \$50K–\$80K per quarter in misdirected senior talent.

Rule of thumb: Every quarter of delay costs approximately 25% of the annual automation value. A \$2M/year opportunity delayed by one year destroys \$500K in value.

Four structural advantages for AI industrialization

SUPPLY-SIDE ADVANTAGE

Talent Base

The world's largest pool of English-fluent STEM graduates — combined with 30 years of global-scale IT delivery. India's engineering workforce is uniquely capable of managing the Human-in-the-Loop oversight that high-stakes AI demands.

INFRASTRUCTURE ADVANTAGE

DPI as AI Infrastructure

India Stack provides the identity, payments and consent layers AI applications need — already built, at scale, interoperable. As AI agents require verified identity and permissioned data, India's DPI becomes a structural moat.

COST STRUCTURE ADVANTAGE

Frugal Innovation Culture

Jugaad thinking applied to AI: maximizing impact per compute dollar — smaller, domain-specific models at low cost across healthcare, agriculture and finance. India's instinct to optimize for constraint is exactly what the world needs.

DEMAND-SIDE ADVANTAGE

Demand at Scale

1.4 billion people across healthcare, education, agriculture and government provide high-volume, heterogeneous AI use-cases that stress-test and refine models faster than any lab — producing battle-hardened systems exportable globally.

STRATEGIC CONTEXT · GCCS

**India can compress AI Stages
1–3 into 18–24 months**

1,700+ GCCs sit at the intersection of Western AI investment and Indian engineering depth — the ideal environment to pilot quick-serve AI products and validate governance models.

Data sovereignty through DPDP Act builds a defensible moat — early compliance becomes a differentiator as global enterprises require India-compliant AI.

SECTION 02

The adoption of AI in Finance

A live pulse-check, and the two strategic shifts – Transformation shift and adoption dilemma



TRADITIONAL VS. AGENTIC

From traditional digital landscape to agentic architecture

TRADITIONAL VIEW · LINEAR PIPELINE

01 · SOURCE SYSTEMS

Legacy systems

ERP · CRM



02 · DATA

Data stores

Data warehouse · SharePoint



03 · COMPUTE

Calculation engine

Excel · Macros · Point automation



04 · OUTPUT

Reporting layer

Power BI · Excel

WHERE IT BREAKS

· Siloed systems

· Fragmented data

· Broken, manual processes

THE SHIFT ↓

AGENTIC WAY · CONNECTED CONTEXT GRAPH

Connect → Interpret → Orchestrate

Connect

One context graph

Logically links every data point across systems

PDFs

Docs

Emails

Transactions

ERP / CRM

Raw data

Interpret

Your business lens

Meaning mapped to how the business runs

Sales Region / Customer segment

Product hierarchy / Revenue streams

Supplier / inventory

FX / Bank / Import / Export / Tax

Orchestrate

Orchestrated to outcomes

Agents act — with humans in control

Automated workflows

Desired outcomes

Controls & transparency

Four questions every finance organization must be aware of

No easy answers — only trade-offs. Where does your organisation stand?

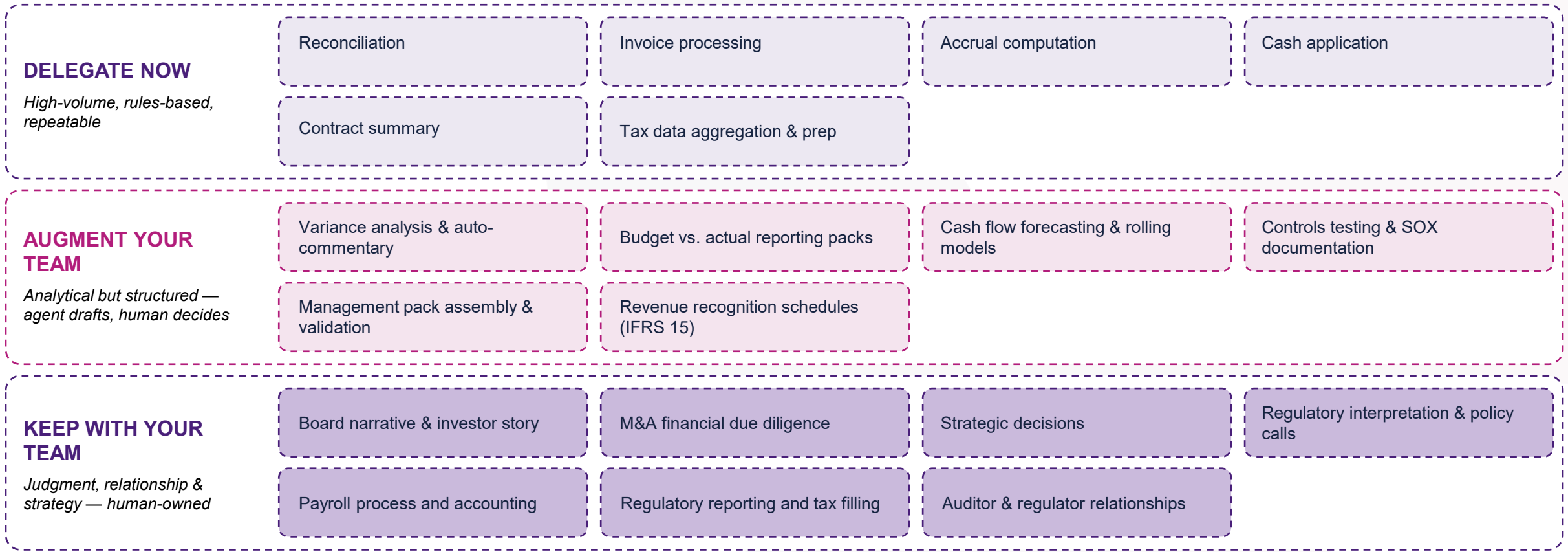
01	DELIVERY MODEL Which AI platform to adopt to kickstart the finance journey?	ERP embedded AI vs Agentic platform
02	OPERATING MODEL What extent processes to be AI enabled vs automated in finance organization?	Human-in-the-loop (Delegate / Augment) vs Human-only
03	REPORTING Will data analysis and reporting software be redundant?	Static reporting vs Dynamic reporting
04	BUSINESS IMPACT How do we scale up AI journey?	Use-Case based vs ROI based Build vs Buy

Your digital finance team – six agents you can deploy today

FINOPS AGENT 01 Examples: ▪ Invoice processing ▪ Cash application. Saves: 40–60% additional efficiency gain Human Stays In Control Human reviews exceptions and approves final posting.	CLOSE AGENT 02 Examples: ▪ Auto post journals ▪ Reconciliation ▪ Accruals ▪ Memo preparation Saves: 2–3 days saved per close cycle Human Stays In Control Human reviews exception queue & govern the overall close checklist	COMPLIANCE AGENT 03 Examples: ▪ RCM generation ▪ Tests controls ▪ Anamoly detection ▪ Monitors policy breaches Saves: 40–60% reduction in controls testing time Human Stays In Control Human investigates findings & signs off on remediation	FP&A AGENT 04 Examples: ▪ What if analysis ▪ Variance analysis and narrative ▪ Cash flow forecasting Saves: 50–70% less analyst time in planning cycles Human Stays In Control Human interprets, challenges assumptions & presents	Contract agent 05 Examples: • Revenue recognition • Leases accounting • Vendor discount Saves: Upto 60% reduction in manual revenue review Human Stays In Control Human approves complex contracts & regulator queries	REPORTING AGENT 06 Examples: • Annual Report builder • Tax reports • Treasury reports Saves: 30–50% efforts saved per report cycle Human Stays In Control Human edits narrative, adds strategic context & approves
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The finance handover map — where agents fit

Not all finance work is equal. Here is how to think about the handover decision.



AGENT READINESS



HIGH



MEDIUM



LOW

PULLING IT TOGETHER

Key imperatives to start your AI journey

Six sequential moves from intent to measured value — governed continuously, not at the end.

ACROSS EVERY STEP

Continuous Change Management & Governance

- Executive sponsorship cadence
- Skills, roles and ways of working
- Controls, audit trail, model oversight
- Data privacy and regulatory alignment

The most common reason AI programs stall — and the step most often skipped.

01

Sponsorship

Secure an explicit mandate from the Board and CXO leadership before any spend.

02

AI Strategy

Settle build versus buy and choose the partners you will start the journey with.

03

Use Case Identification

Apply a strict framework to shortlist quick wins in high-trust, high-volume areas.

04

Adoption Roadmap

Sequence deployment across a 3, 6 and 9-month horizon with named owners.

05

Proof of Concept

Run three to four use cases with success criteria agreed before you begin.

06

Deploy & Measure

Scale what works and measure iteratively against the RoI you defined at the outset.

SECTION 03

The Platform, Live

Finance agents in action – automate, augment and prescribe



SECTION 3 · LIVE ACTION

Agentic ways — accelerate your AI journey

4 Agentic demos — AI in live action

01

FinOps Agent

Get the data your way

Duplicate data, low trust on data and broken data led to a poor reporting experience

POTENTIAL IMPACT

Self-serve insight for the whole team; every number traceable and gated by maker–checker approval.

02

Compliance Agent

Procurement, run by your ERP agent

From request to PO to posting — the agent drives procurement while finance keeps control.

POTENTIAL IMPACT

Fewer manual touches and always-on spend controls; buyers act on the signal, not the clean-up queue.

03

Contract Agent

Lease information extractor

Unstructured lease PDFs become finance-ready, reviewable data in minutes.

POTENTIAL IMPACT

Reusable document-intelligence layer that scales to IFRS 16, contracts, tax and AP — not one lease use case.

04

FinOps Agent

AI-assisted reconciliation

Match records across sources, score confidence, and close days faster.

POTENTIAL IMPACT

Shorter close cycle and earlier anomaly visibility, with human review reserved for the exceptions.



Thank you!

