



# Finance Function Reimagined with AI

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**Data makes the difference.**



# Zero person organization



# Gen AI is a game changing breakthrough

AI isn't new and has held a lot of promise for decades, but Gen AI is a game changing breakthrough with infinite possibilities due to the broad applicability, ease of use, relatively low cost and focus on creativity.

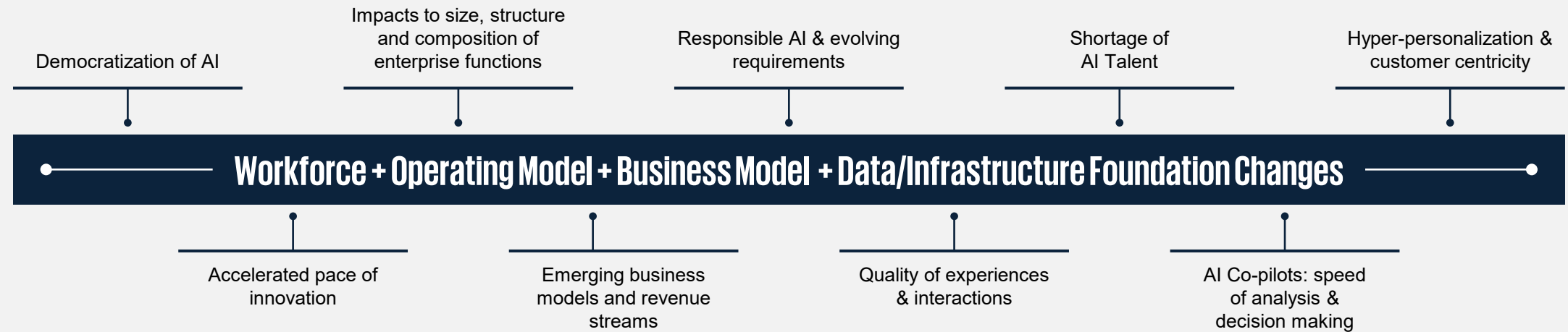
Generative AI has extensive applicability to “create” from writing code, producing reasoning from huge datasets, building realistic images and video, improving itself and accelerating toward general intelligence.

Digital Enablement <i>(Cloud CRM, ERP, EPM)</i>	Classical AI <i>(RPA, M/L, Advanced Analytics NLP)</i>	Generative AI <i>( LLM, VAEs, Transformer Models)</i>
<b>Automates standard, repetitive tasks and reporting within and across enterprise applications</b>  Increases process efficiency, accelerates cycle times, improves quality, & mitigate risks	<b>Continuously learns and adapts, automating more complex and non-repetitive activities</b>  Improves speed and accuracy of pattern recognition, anomaly detection and predictions	<b>Simulates human intelligence; automating analytical, innovative &amp; decision support activities</b>  Unprecedented speed and quality of insights, simulating outputs from high value, highly skilled talent

Technology advancements continue to impact higher value, higher skilled roles

# AI/Gen AI disruption presents significant opportunity for finance organizations

AI and Gen AI technology are disrupting organizations at an accelerating speed and increasing complexity. This presents a significant opportunity to drive value if it's done at scale and with the appropriate guardrails.



**The opportunity  
is real**

**37.4%** of organizations believe Gen AI will disrupt their competitive position or business operating model in the next 18 months<sup>1</sup>

**3.5X** expected return on AI investments within 14 months of deployment (for every \$1 invested, \$3.5 in return)<sup>2</sup>

1: Source: Gen AI ARC Survey, IDC, August 2023; 2: Source: KPMG 2023 AI in Financial Services Reporting Survey

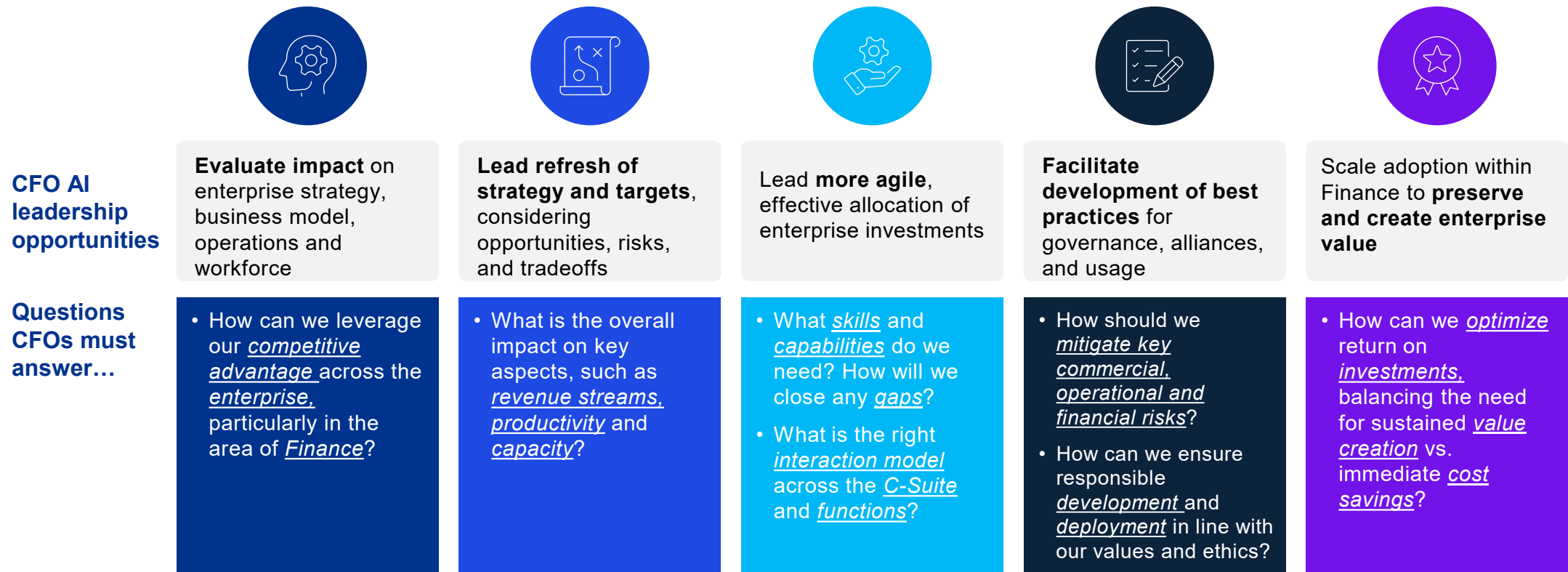


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# Why CFOs are positioned to be leaders of AI adoption

Gen AI is a natural extension to the CFO's existing responsibilities related to business strategy, digital transformation, and risk management



Gen AI adoption is a survival imperative and CFOs are ideally positioned to be leaders of the charge

# AI creates new opportunities for CFOs to unlock value

Unlock value across enterprise functions to gain an unbeatable competitive edge

## Finance opportunities

## ...to create value\*

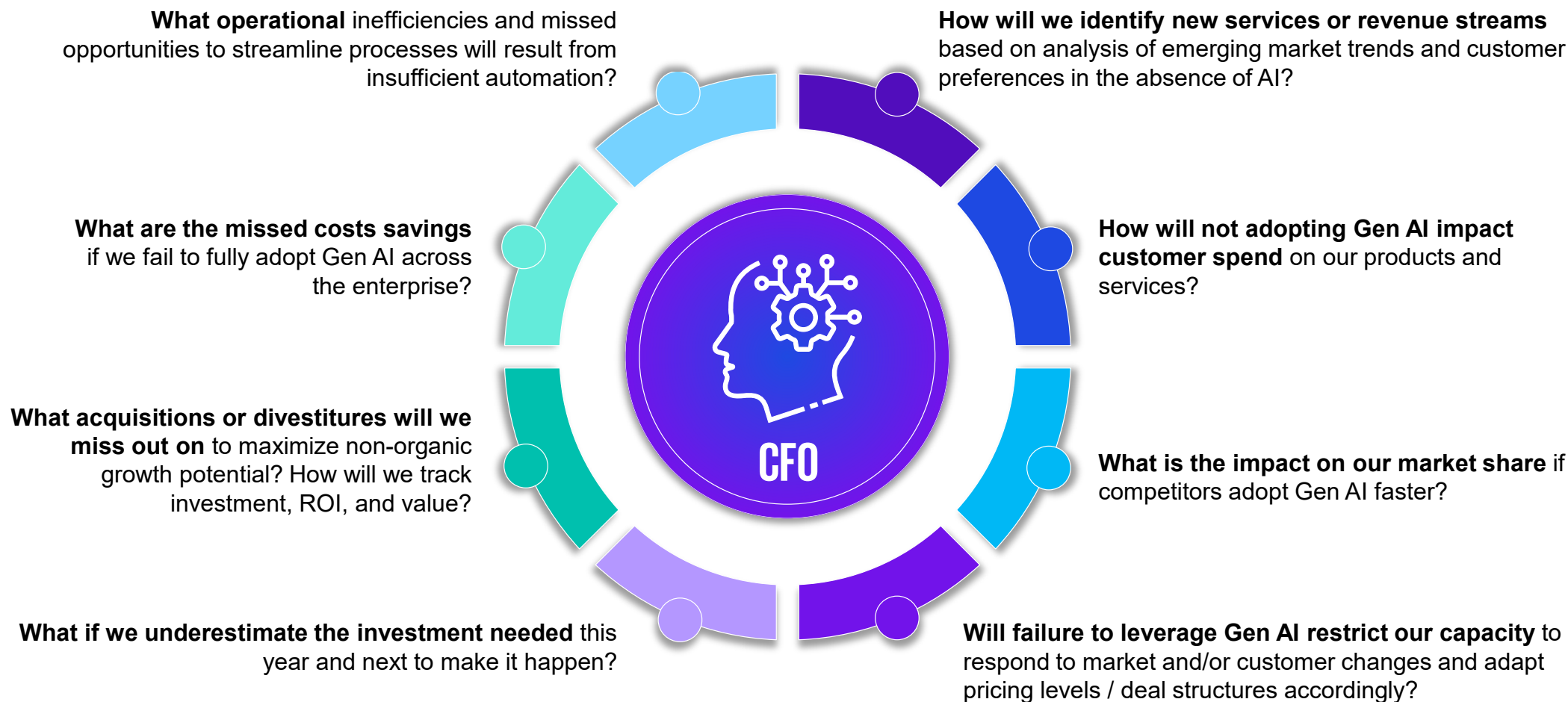
## ....across functions

 <b>Improve productivity</b>	Eliminate inefficiencies and enable operational excellence	<b>40 - 70%</b> capacity gains  <b>5 - 6x</b> more time spent on collaboration & innovation	<b>Finance</b>  <b>Sales &amp; Marketing</b>
 <b>Increase profitability</b>	Enable dynamic commercial strategies & more agile operations	<b>30 - 40%</b> lower costs to serve for select functions  <b>10 - 20%</b> improvement in operating margins	<b>Supply Chain &amp; Operations</b>  <b>Procurement</b>
 <b>Enhance quality &amp; experiences</b>	Improve job satisfaction & enhance the customer experience	<b>15 - 25%</b> decrease in voluntary employee attrition  <b>20-30%+</b> Uplift in NPS	<b>Technology</b>  <b>Human Resources</b>
 <b>Accelerate growth</b>	Facilitate more agile and effective investment allocations	<b>25 - 50%+</b> CAGR  <b>3 - 5x</b> Return on Investment	<b>Legal &amp; Compliance</b>

\*Source: Potential value estimated based on extrapolation of KPMG AI & Technology surveys and cross-industry analysis on the impact of AI over the next 24 – 36 months



# The risks of **not** adopting AI outweigh the risks introduced





# The next chapter of finance

Intelligent capabilities in finance will serve as the backbone to strategic growth and value creation

## Capabilities



**Continuous** business insights



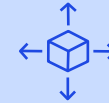
AI-enabled anomaly detection & **exception management**



**Personalized**, role-based dashboards with **Generative commentary**



**Boundaryless**, mobile delivery



**AI Agents** at Scale



**Dynamic**, AI-enabled forecasts & visuals



Intelligent, **touchless processing**



**Voice enabled**, conversational BI

## Characteristics



**Digital DNA**



**Data Obsessed**



**Ethical & Responsible**



**Innovative & Bold**



**Strategic & Collaborative**

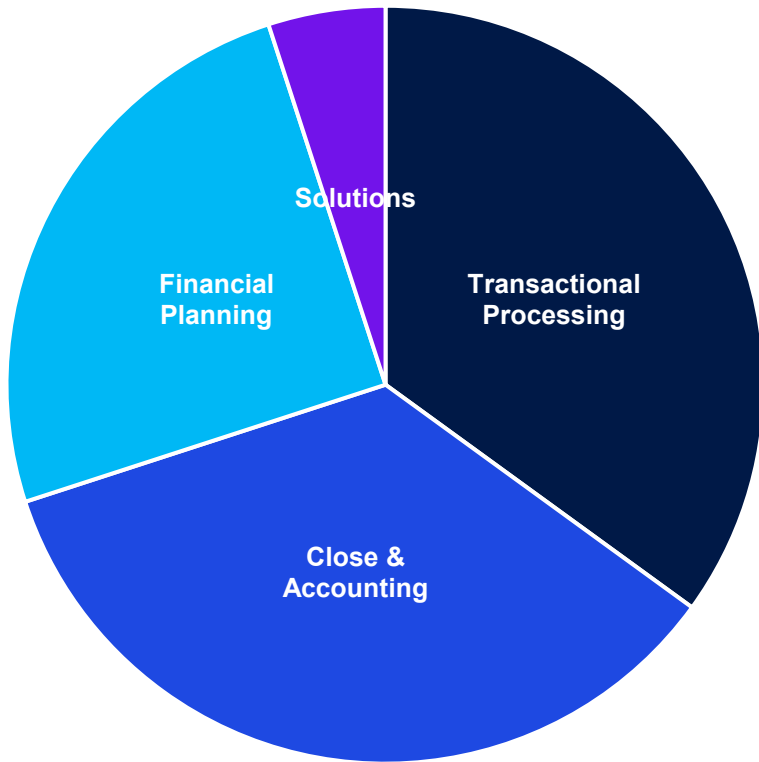


**Customer Centric**

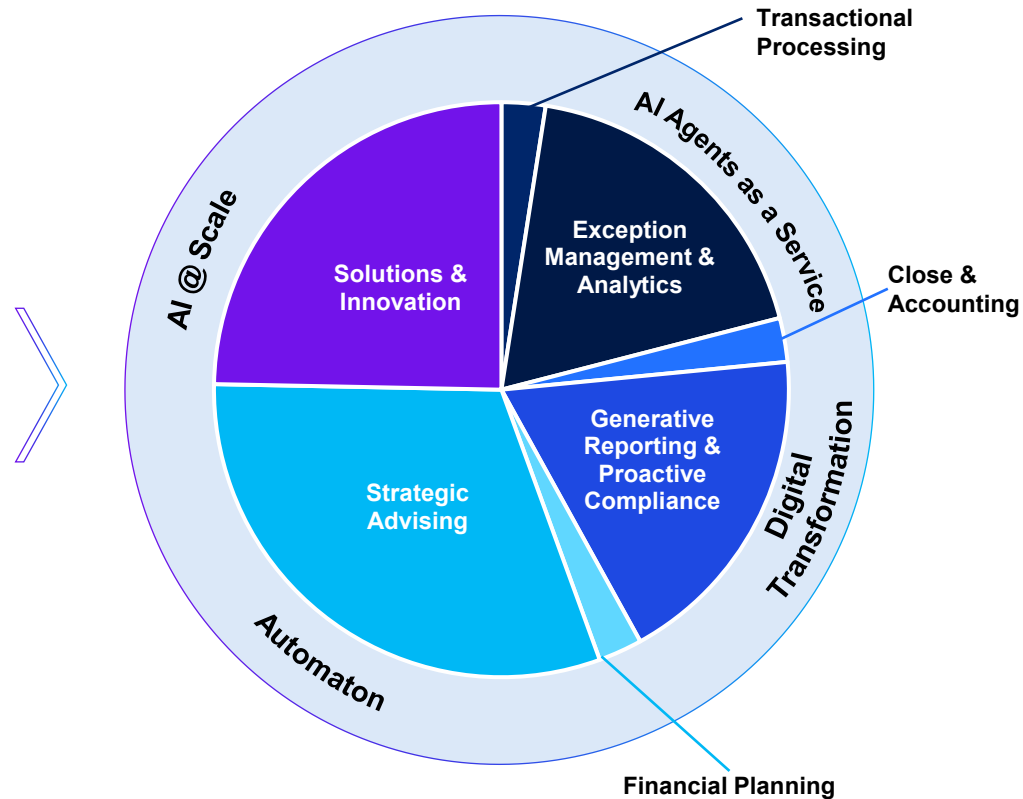
# Flex the finance delivery model

AI, data and the intelligent cloud will drastically change the size, shape and composition of finance

## Today's Finance



## Next Gen Finance

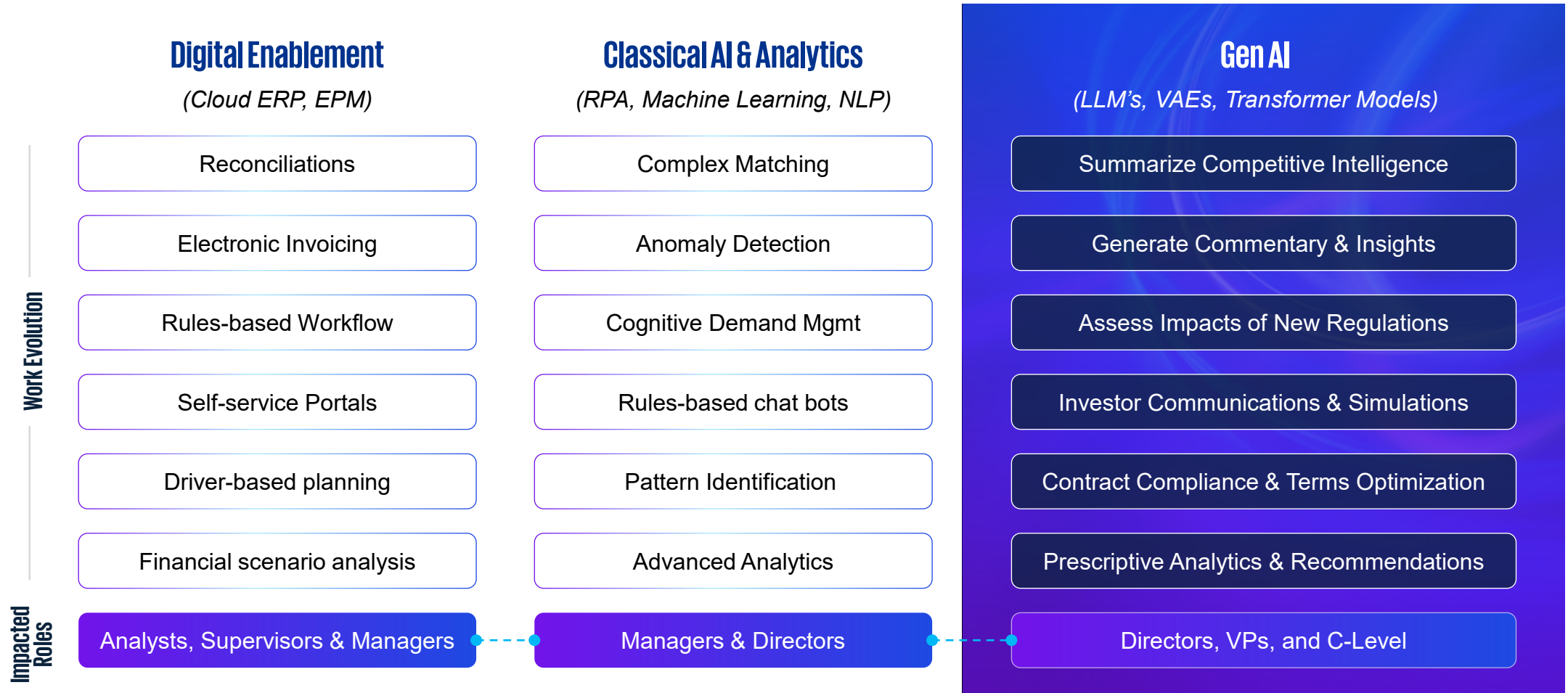


## Key Competencies:

- Intellectual Curiosity
- Business Acumen
- Storytelling
- Digital & AI Fluency
- Value Management
- Data Exploration
- Digital Literacy
- Data Modelling
- Data Science & Engineering
- Digital Transformation

# Gen AI is significantly impacting work evolution

New capabilities are more sophisticated and accessible than ever



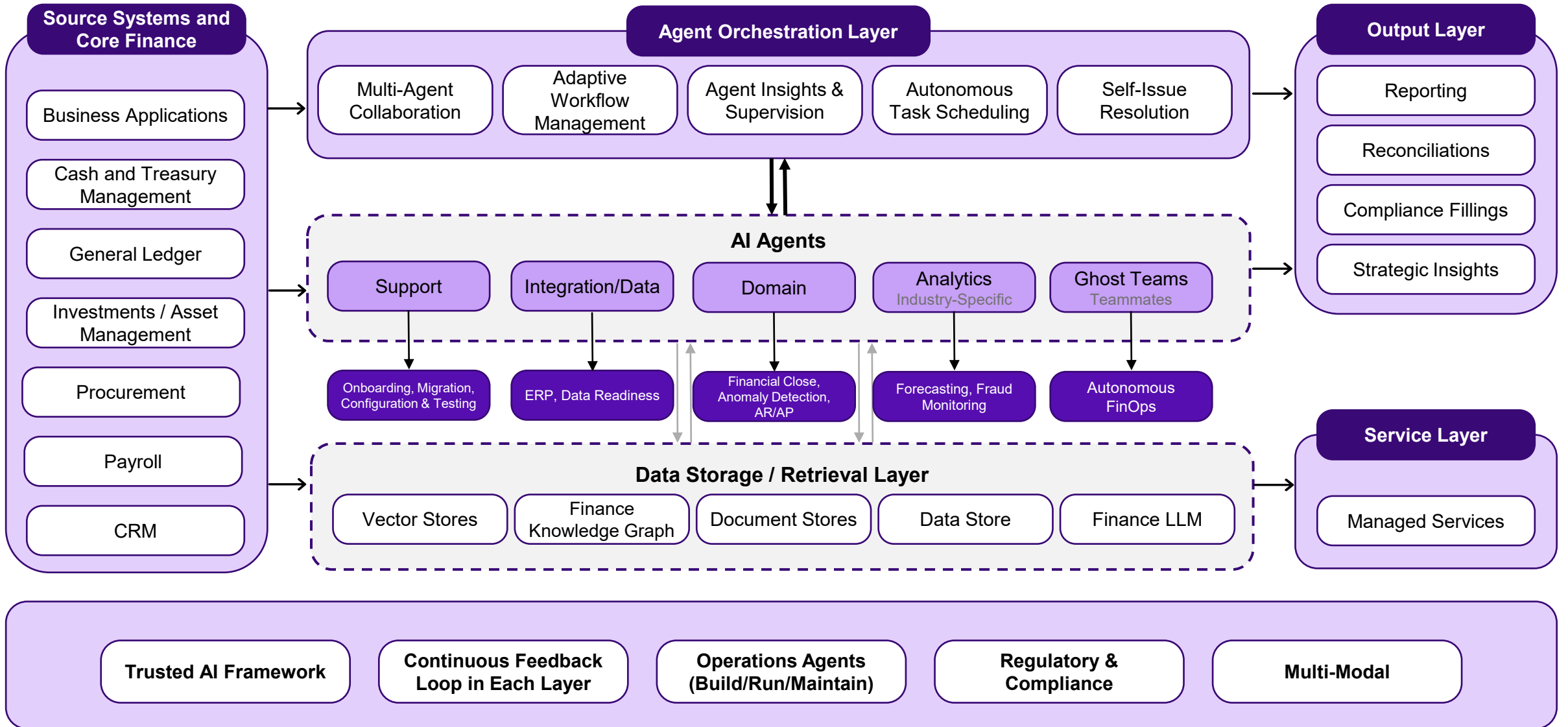
# For Finance functions, there is a wide variety of potential use cases

Accounting & Reporting	Financial Planning & Analysis (FP&A)	FinOps (AP, AR)	Internal Controls & Compliance	Investor Relations	Procurement
Anomaly detection	Extract and analyze market intelligence	Invoice matching and approval (AP)	Risk Profiling and Scoring recommendations and corrective actions	Peer Group Market Analysis	Supplier Selection
Account Reconciliations	Intelligent Forecasting Analysis (e.g. summary, recommendations)	Quote Generation & Purchase order management	Risk-based Sampling	Research and preparation for earnings call	Smart Contracts
Identification & processing of suspense account reclass JEs	Cash (liquidity) forecasting & analytics	Improve upstream data readiness w/ Process Mining	Recommendations and corrective actions	Summarization of 10k/10q, Earnings Call summaries	Inventory Optimization
Automated PR Generation and Accruals calculation	Spend & variance analysis	Monthly business and operations reviews	Detect data anomalies & fraud		Procurement Help Desk
Fixed asset cost segregation & classification	Create management presentations and commentary	Customer behavior and sales performance data	Internal policy documentation		Supplier Risk Mitigation
Revenue recognition engine (linked to customer contracts)	Corporate knowledge search and chat	Customer & Supplier Onboarding Automation	Contract T&Cs compliance / optimization		
Financial statement summarization & analysis		Automation of AP and AR support / mailboxes	Continuous Controls Monitoring		
(Earnings) report generation (incl. MD&A)		Cash Applications (AR)	Parsing and workpaper (documentation) generation		
		Generative contracts for procurement and payables	New Regulation Summary / Implications		

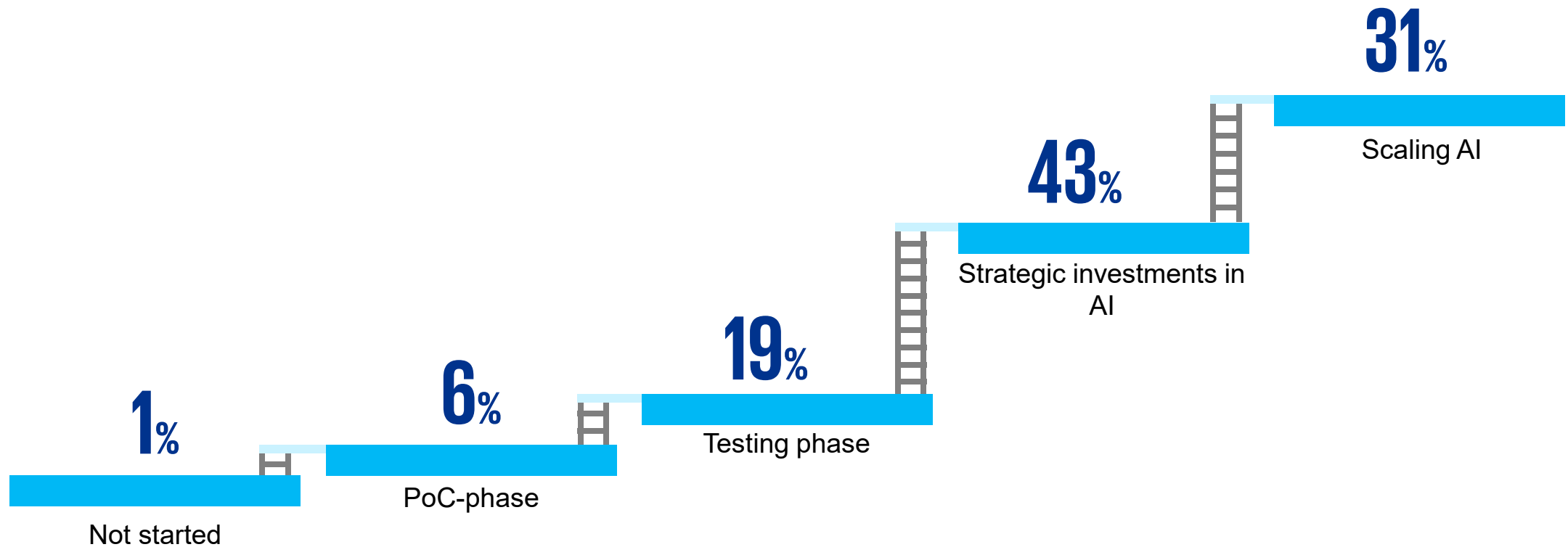
Data makes the difference.



# Agentic Finance



# Most organizations are now seeing some return from AI, but value at scale remains harder to achieve



**Three-quarters of organizations are already seeing the potential value of AI**  
**However, only a third realize it at scale**

# Getting started

Speed, agility and effective cross-functional collaboration are critical to maximizing RoI and scaling responsibly

## Companies need to



**Appoint and empower leaders;** need single point of contact for each function



**Align on cross-functional approach** for prioritization, tech choices, compliance and change management



**Prioritize areas of highest impact** based on defined evaluation and success criteria



**Enable smart experimentation** with secure LLMs in your environment



**Define the roadmap and value case;** aligning initiatives, sequencing and investments with strategic priorities



**Get moving** with launching pilots, scoring quick wins, learning, and building momentum



**Accelerate mobilization:** value assessment, approach, prioritization, governance, roadmap, and change strategy



**Modernize platforms:** data architectures, LLM build / buy strategy & selection, data cloud migration, product engineering



**Transform functions:** strategy through implementation, workforce augmentation, and managed services



**Transform workforce:** organization design, workforce shaping / management, talent strategy, L&D, change management



**Maintain trust & compliance:** responsible AI, cyber security, internal controls, risk management, testing, governance

## How KPMG can help



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