

From Automation to Advantage: The 90-Day AI Launch Plan for Finance Leaders

Turn Uncertainty Into Momentum With a Clear,
CFO-Led Roadmap

Executive Summary

The future of AI in finance isn't theoretical — it's operational. But many CFOs are stuck in pilot purgatory. While 98% have invested in AI, only 20% are using generative tools at scale. The solution? A 90-day action plan that balances experimentation with execution.

Why Now?

- 70% of CFOs plan to invest in AI for finance in 2025
- Early adopters are already closing faster, spending less, and operating leaner
- Waiting for perfect clarity means falling behind

Phase 1: Foundation (Next 90 Days)

1.- Audit & Prioritize

- Map current finance processes to identify pain points (e.g., AP processing, reconciliations, close)
- Target manual, rules-based, or error-prone tasks first
- Estimate cost savings, time recovered, and FTE impact

2.- Select the Right Pilot

- Choose one high-impact use case to test (AP automation, BlackLine anomaly detection, etc.)
- Set success metrics (time saved, accuracy improved, cycle shortened)

3.- Engage Your Team

- Identify AI champions and skeptics
- Train key users in pilot tools — no-code interfaces preferred
- Align with HR on upskilling plans for impacted roles

4.- Set the Guardrails

- Implement governance protocols: data access, approval workflows, risk flags
- Document AI usage and outcomes for audit and regulatory readiness

Bonus: Cross-Functional Collaboration Tips

- ☐ Partner with IT on tool selection and integration
- ☐ Loop in HR for workforce impact planning
- ☐ Assign a pilot team to report findings and recommend scale-up

Takeaway

This is your low-risk, high-ROI launchpad. By the end of 90 days, you'll have:

- Proven value in one area
- Internal case study data
- Team momentum and leadership credibility

Final Thought

AI isn't a finance project. It's a business capability. The teams that launch fast and learn faster are the ones that win — not just in productivity, but in influence.