

CFOs

3 Actions to Do Now

Start driving strategy with intelligent forecasting

Identify Your Forecast Bottlenecks

1

- ☐ Review how forecasts are currently generated.
- ☐ Where are the delays coming from? Is it manual data pulls? Model maintenance?
- ☐ Quick win: Automate one forecast input, such as revenue or expense drivers, using real-time data streams.

Build a Use Case for Scenario Planning

2

- ☐ Map one decision-making area (e.g., headcount, margins, spend) that could benefit from rolling scenarios.
- ☐ Prompt to explore: “What would it take to refresh this model weekly instead of quarterly?”

Evaluate Your AI Maturity

3

- ☐ Are you relying on dashboards or intelligent alerts?
- ☐ Are your analysts answering questions or generating proactive insights?
- ☐ Quick win: Start using natural language queries for faster insights from existing reports.