CFO AI ROUND TABLE

October 15, 2026

Overview

The October 15 CFO AI Round Table explored how finance leaders are approaching AI investment, governance, adoption, and measurable business value. Most respondents in this event's poll expected AI spending to grow. Discussions also surfaced questions about accountability, governance, and measuring business value.

Poll Results and Discussion Themes

80% expected AI spending to increase (Event poll · n=25): 32% expected it to increase significantly and 48% somewhat. Eight percent expected spending to stay the same, 4% expected a decrease, and 8% were unsure. These responses reflect this event's respondents and are not intended to represent all CFOs.

Spending expectation	Share of respondents
Increase significantly	32%
Increase somewhat	48%
Stay the same	8%
Decrease	4%
Unsure	8%

Discussion-theme summary

The following themes were raised in the small-group discussions. They are qualitative summaries, not counts of how many participants raised each issue.

Ownership and accountability

Participants described uncertainty about decision authority, accountability for outcomes, and coordination across functions. Some discussion focused on whether AI governance was meaningfully owned by business leadership, distributed across teams, or concentrated in a small number of individuals.

Governance, security, and shadow AI

Participants discussed the use of personal subscriptions or unapproved tools, including risks when sensitive or proprietary information is entered without adequate oversight. They also raised the challenge of setting practical guardrails that protect information without unnecessarily preventing useful experimentation.

Measuring business value

Participants discussed challenges reconciling projected benefits with observed results and using that information to assess continued investment. Time savings and individual productivity gains can be difficult to translate into credible financial outcomes, investment cases, or board reporting.

Process-first implementation

Participants raised concerns about selecting technology before mapping processes, defining business problems, or agreeing on success measures. They also discussed data readiness and the risk that AI can make an inefficient process faster without resolving the underlying issue.

Workforce readiness and adoption

Participants described varying levels of AI understanding across management and frontline teams, informal rather than systematic training, and concerns about potential job changes. They discussed the need for clear communication and practical support as adoption develops.

Data, regulatory, and vendor constraints

Participants discussed data quality problems, uncertainty about acceptable AI use in regulated settings, difficulty obtaining clear vendor information, and forecasting or managing usage-based costs.

Implementation Approaches Discussed by Participants

Distributed accountability

Participants described cross-functional governance groups and department-level AI champions as ways to surface use cases and avoid concentrating all knowledge or responsibility in one person. One approach discussed included AI leads across major functions, regular coordination, senior security oversight, and escalation to the board.

A Participant-Reported Workflow Improvement

One participant described a reduction in financial-close time from 20 days to 8 days and estimated approximately 700 hours saved annually across month-end close and other recurring work. The discussion highlighted the usefulness of documenting workflows and comparing results against a baseline. This individual account has not been independently verified and should not be interpreted as a typical or expected result. The estimated 700 hours includes other recurring work and is not presented as a calculation derived solely from the shorter close.

Usage and cost oversight

Participants discussed monitoring AI usage and associated expenses to manage vendor costs and encourage responsible adoption. One reported approach combined leadership expectations for adoption with usage metering and a soft cap for heavy users; the reported 20–25% improvement in feature deployment speed has not been independently verified.

Sharing success stories

Participants discussed sharing before-and-after examples with leadership to make use cases and outcomes easier to understand. Such examples can describe the business problem, the workflow change, and the measured result.

Targeted automation and internal tools

Examples discussed included AI-assisted transcription of handwritten purchase-order data, automation of repetitive drawing tasks, and a customized CRM built with AI-assisted coding in approximately two weeks. These were individual accounts shared during the discussion, not verified benchmarks or expected outcomes.

Investment prioritization

A 70/30 split between optimizing current operations and rebuilding processes for competitive differentiation was raised as an illustrative suggestion during discussion, not as a recommended or universally applicable allocation.

Perspectives From the Discussion

Business strategy and AI

Participants questioned whether organizations need a standalone AI strategy or should instead start with a business strategy that AI might enable.

Decision authority, accountability, and coordination

Participants distinguished among decision authority, accountability for outcomes, and cross-functional coordination.

The risk of a single champion becoming a bottleneck

Participants discussed how concentrating AI knowledge and responsibility in one enthusiastic individual can create a single point of failure, and how departmental champions may help distribute capability.

Productivity and financial results

Participants discussed how individual productivity gains may not translate into visible changes in revenue, pipeline, or financial statements unless organizations determine how time savings will affect capacity, service, volume, cost, or quality.

Professional-services pricing models

Participants raised the possibility that AI-enabled efficiency may not produce clear financial returns if delivery time falls but pricing and service models remain unchanged.

Workforce change

Participants emphasized clear communication about potential workforce changes and cautioned against promising that every affected role will be replaced by another opportunity.

Monitoring more autonomous systems

Participants discussed whether more autonomous systems may require additional monitoring, escalation procedures, and human intervention, depending on the use case.

Learning and implementation support

Participants described differing levels of experience and interest in practical frameworks, training, examples, and implementation guidance.

Questions and Next Steps to Consider

- Which business priority or process should be addressed first, and what problem is AI expected to solve?
- Who has decision authority, who is accountable for outcomes, and who coordinates across functions?
- What baseline and post-deployment measures will show value beyond hours saved?
- How will productivity gains translate into financial or operational outcomes?
- Are data quality, confidentiality, compliance, vendor transparency, and ongoing costs understood?
- What training and change-management support will help teams adopt AI responsibly?
- How should usage and spending be monitored, and what oversight is appropriate for the use case?
- Could AI-enabled efficiency require changes to pricing, delivery models, staffing, or capacity planning?

Methodology and confidentiality

This report is based on the October 15, 2026 CFO AI Round Table breakout room discussions and poll results. Poll percentages are based on 25 respondents. Discussion themes are qualitative and should not be interpreted as statistically precise participant counts. Practical examples and outcomes reflect what was shared during the discussions and have not been independently verified. Names, company names, room-level attributions, timestamps, and distinctive identifying details have been omitted or generalized to respect confidentiality and non-attribution.

Prepared for CFO AI Advisors | Private peer discussion | Aggregated, non-attributed findings