

genpact

The CFO Forum Journal

2026 Agentic AI Edition

Agentic AI insights for an
autonomous finance organization

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From the editor's desk

Welcome to the 2026 CFO Forum Journal. In this edition, we focus on how agentic AI transforms finance, providing actionable strategies for adopting advanced technology. Featuring insights from global finance leaders and Genpact experts, we emphasize the critical role AI agents play in driving innovation and operational excellence in finance organizations.

You have led financial optimization by leveraging digital solutions such as machine learning, natural language processing, and automation. These advancements have positioned your organization at the forefront of autonomous finance innovation. In 2026, CFOs embracing advanced technology will set new standards for impactful, data-driven operations. AI agents are essential partners in streamlining processes and improving the finance function's effectiveness.

Use this journal as a catalyst to move beyond retrospective analysis and actively shape your company's future in 2026 and beyond. Thank you for your commitment to our CFO community.



Dr. Alfred Sanders, CPA

Genpact CXO Forums Program Leader

Dr. Alfred Sanders serves as the Genpact CXO Forums program leader. He brings a wealth of experience as a business consultant and educator, with a focus on finance strategy, technology, and operational efficiency. Prior to Genpact, Alfred held the role of CFO, consulting partner, and head of global financial operations.

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Letter from the CFO Forum Leader



Ed Fitzpatrick
CFO Forum Leader

Dear finance leaders,

The year 2025 marked a turning point for AI in finance, as the industry shifted from discussing possibilities to implementing practical, impactful solutions.

Across our CFO Forum gatherings in New York, Florida, Chicago, London, and Japan, the energy was clear. We've gone from discussing the possibilities of AI to sharing stories of successful implementations and outcomes. The speed at which you embraced AI has been remarkable. Many of you have progressed well beyond initial proof-of-concept stages, fully integrating AI into your everyday operations to enable smarter and quicker decision-making.

Some CFOs have taken innovation even further by piloting agentic AI-powered solutions that not only generate actionable insights but also autonomously execute on them – streamlining complex workflows, accelerating operational processes, and significantly enhancing the overall user experience. The journey toward a more autonomous finance function has begun.

Of course, advanced technology isn't without its challenges. Topics of priority include the need for clean, reliable data and the importance of building strong governance from the beginning. A key learning from our discussions was that progress happens one step at a time. The most successful teams focused on specific, high-impact projects, proving the value and managing the risk of AI before scaling up.

We extend our deepest gratitude to our partners at Microsoft, ServiceNow, and Salesforce for sharing their innovative, real-world solutions powered by AI and agentic AI. Your forward-thinking insights and technological breakthroughs in finance have greatly inspired our CFO community, demonstrating that what was once considered impossible is now achievable. We are witnessing the continued expansion of agentic AI across even more facets of finance business operations and enterprise risk management.

Thank you for your outstanding partnership and for helping make this year's CFO Forums so impactful. I look forward to the remarkable achievements we'll realize together in 2026 as we continue to push boundaries and explore new opportunities.

Best regards,

Ed Fitzpatrick
CFO Forum Leader

Ed Fitzpatrick is the CFO Forum lead and host. As a senior client advisor, Ed has worked with CFOs and other C-suite executives to address emerging areas of finance transformation, using Genpact's deep technology, business, and industry expertise. Prior to his current role, Ed served as CFO at Genpact and Motorola/Motorola Solutions. Ed is currently a 10-plus-year board member at Cboe Global Markets (Cboe).

CFOs reflect on 2026



Ian Borden
EVP and CFO,
McDonald's Corporation



2025 marked a pivotal year in McDonald's transformation journey – one where we began unlocking the full potential of our global scale through data and technology. By introducing modern finance and global people platforms, we've laid the foundation for a more connected, data-driven enterprise. This transformation isn't about systems alone; it's about empowering our system with insights that accelerate innovation and create value everywhere we operate. As we head into 2026, we'll harness AI and analytics to help fuel McDonald's innovation and deliver greater value for customers, franchisees, and employees worldwide."



Troy Anderson
EVP and CFO,
Kelly Services, Inc.



For Kelly Finance, 2025 was a foundational year to establish a multiyear transformation roadmap and increase AI engagement and literacy. Over time, we will leverage and scale AI across numerous processes, as well as implement agentic systems to execute end-to-end workflows, allowing our teams to focus on driving the business forward. The real unlock is building a finance team fluent enough in AI to know when to trust it, when to challenge it, and when to let it lead."



Jason Jiskoot
SVP and CFO,
Pella Corporation



The past year reinforced that uncertainty is the new normal. Businesses in 2025 faced inflationary pressures, talent challenges, and digital disruption – all while working to drive sustainable growth. The future will require CFOs to be architects of strategy in addition to guardians of capital. Expect deeper integration of AI and real-time analytics into financial planning. Those who embrace this evolution will redefine what it means to lead – delivering resilience, growth, and purpose in equal measure."



Rob Vetch
CFO,
Santam Syndicate 1918



The role of the CFO has been evolving from traditional retrospective reporting to real-time, proactive, and strategic business partnering over recent years. However, through automation and agentic AI tools that were merely being talked about in 2024 and are now a daily reality, the CFO and finance function evolution is being augmented and accelerated like never before."

CFOs reflect on 2026



Richard Paik
CFO,
GitHub



One of the ways we have seen AI make real inroads in delivering value is through AI-driven coding. AI has fundamentally transformed the way the world builds software, and it's become increasingly sophisticated over the last year. We've seen customers go from using GitHub Copilot for code completion to leveraging its agentic capabilities to autonomously perform complex tasks across their codebases. This dramatically accelerates development while simultaneously increasing developer satisfaction. Developers using AI-driven coding agents are more energized by their work, and we expect that will continue as the AI becomes even more advanced."



Doug Horne
CFO,
Trullion



Throughout my career, I've witnessed technology transform the finance function, but the pace of change driven by AI and agentic solutions is unprecedented. As we close out 2025, I believe we're standing at an inflection point that will fundamentally reshape finance and accounting in ways we haven't seen in a generation. Five years from now, roles within the CFO organization will be far less about processing data and more about strategic interpretation. The future belongs to CFOs and finance teams who can marry deep financial expertise with technological vision."



Mike Weiner
CFO,
Genpact



In 2025, for senior executives, especially CFOs, the question was no longer whether to pivot but where, how fast, and on what terms. At Genpact, my teams are funding innovation, aligning capital allocations with enterprise goals, meeting evolving stakeholder expectations, and managing risk all at once. To deliver expected value, Genpact's finance teams are now embedding finance with strategy and technology as well as developing the next generation of financial professionals who are proficient in data, analytics, and technology."

Inside the CFO Forum: 2025 highlights

This year, Genpact's CFO Forum united finance leaders from around the world, hosting dynamic events in New York, Tokyo, Chicago, Miami, and London. Each Forum gathering blended insightful thought leadership, valuable networking opportunities, and genuine camaraderie, all in line with the mission to empower CFOs as they navigate the rapidly changing financial landscape.



2025 Forum golf events

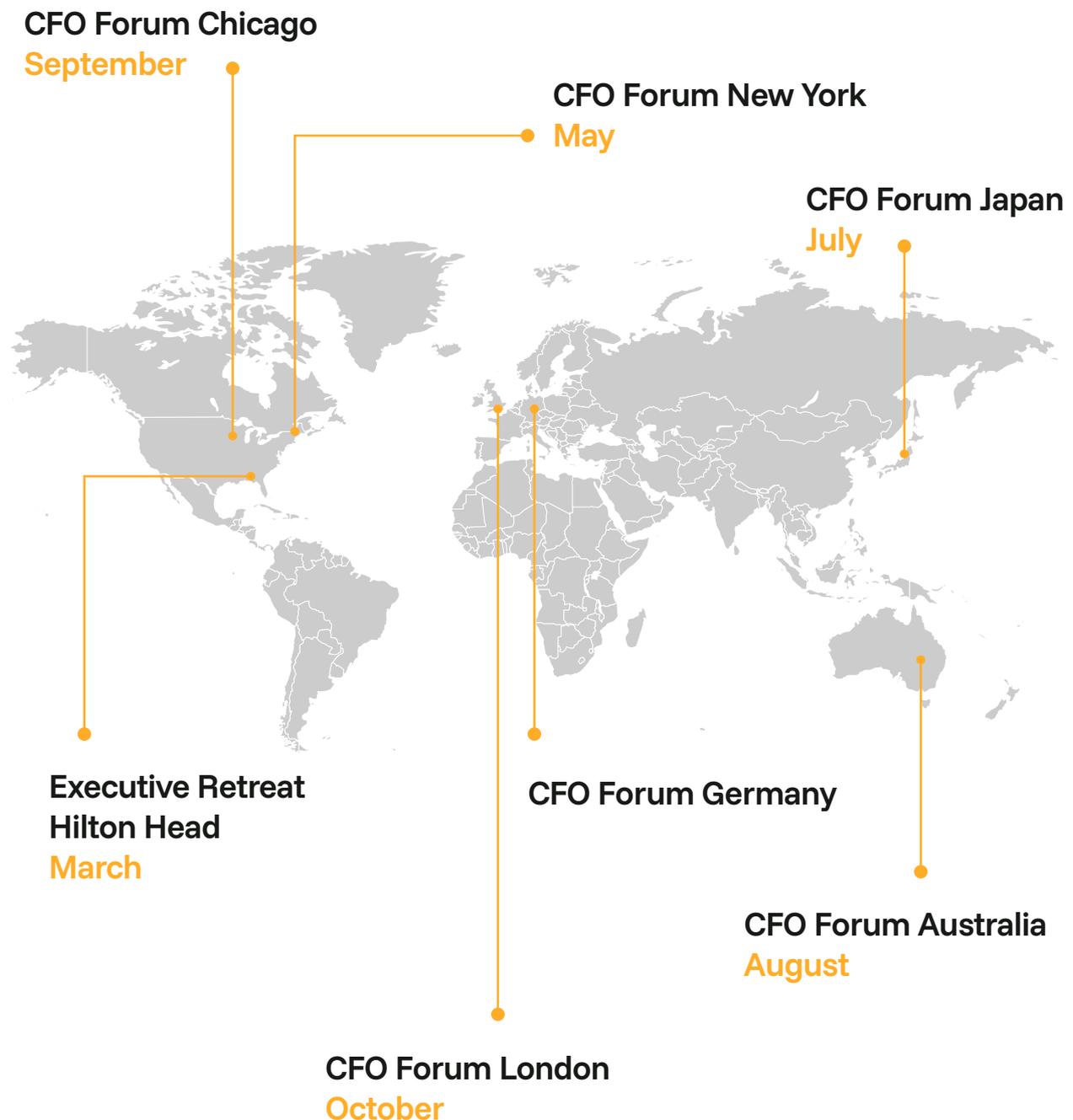
We elevated our client experience by expanding our professional workshop offerings alongside our popular golf outings. These initiatives fostered trusted environments where Genpact clients could connect with Genpact leadership, build meaningful relationships with other Genpact clients, and share valuable insights in settings that blend relaxation with real impact. We look forward to welcoming you in 2026 as we continue to create premier opportunities for engagement and growth.



Upcoming CFO Forum events

Looking ahead to 2026, the CFO Forum is set to deliver a dynamic lineup of events crafted to inspire, connect, and empower finance leaders from around the globe. We are expanding our locations to include Australia, Germany, and other key regions. Join us to dive into the future of finance, engage in meaningful discussions with fellow executives, and expand your network within our vibrant, forward-thinking community.

[Learn more about our future events](#)



AI insights and stories

Report

Autonomy by design: Scaling AI for enterprise value

Real AI-led transformation comes when AI moves from isolated tools to being woven into the very fabric of how organizations operate. Genpact's first annual report on enterprise AI distills insights from a survey of 500 senior enterprise leaders, supported by executive and industry expert interviews, to reveal how leading companies are embedding AI to drive enterprise-wide value and build the autonomous enterprises of tomorrow.

Discover:

1. The four levels of AI maturity and what sets leaders apart
2. The biggest challenges to scaling AI – and how to overcome them
3. Practical blueprints for orchestrating agents, empowering employees, reimagining architecture, and governing at the speed of AI
4. Real-world case studies and insights from over 500 senior executives



Looking out three years, almost a quarter of senior executives expect self-managing organizations that run with minimal human oversight to be a reality.”

Are you ready to start translating AI ambition into measurable enterprise value?

[Read more](#)



From automation to advantage: Orchestrating accounts payable with agentic AI

CFOs are using the transformative power of agentic AI to reimagine processes across the function. Nowhere is this transformation more evident than in accounts payable (AP). Agentic AI is helping AP teams achieve touchless processing, mitigate risks, and strengthen supplier relationships – all while reducing costs.

Read Genpact's whitepaper to uncover:

1. How agentic AI can elevate AP from process to powerhouse
2. Real-world examples of faster invoice processing, proactive fraud prevention, and improved supplier experiences
3. A roadmap to building autonomous AP functions that deliver lasting value



By putting goal-oriented AI agents to work alongside human experts, finance leaders can build future-ready AP functions.”

Discover how agentic AI is reshaping finance – and how your AP team can lead the way.

[Read the full whitepaper now](#)

Building a data foundation for an AI-first finance function: The CFO's playbook

The new CFO mandate is clear: modernize your data, unleash AI, and turn finance into a strategic powerhouse. This means working with data and tech teams to break down silos and create a single source of truth to drive AI- and agentic AI-led operations. Our report is your blueprint for getting there.

Key recommendations:

- 1. Foster CFO-CDO collaboration:** Get comfortable with data, AI, and machine learning (ML) to harness data transformation
- 2. Establish a single source of truth:** Create an enterprise ledger that can bring together data from across the organization
- 3. Deploy and orchestrate AI agents:** Design your systems so that autonomous agents can interact productively



To step into its new role, the CFO must champion a new operating model where finance is the primary owner and product manager of its data while collaborating with data and tech teams.”

Deep dive into insights from leading finance and data leaders as well as Genpact experts.

[Read the report](#)



Article

Agentic AI and the accountant: Collaboration, not automation

Accounting is evolving, and agentic AI is leading the charge. Unlike traditional automation, agentic AI doesn't follow a script – it adapts, learns, and collaborates with accountants to tackle complex tasks like fraud detection, compliance, and strategic planning.

Key takeaways:

1. **From automation to augmentation:** Collaborate with agentic AI to improve workflows and insights
2. **Real-world applications:** Drive efficient closes, real-time auditing, and proactive tax planning
3. **Getting started:** Prioritize easy, low-risk tasks, track results, and integrate AI into current processes
4. **Guardrails matter:** Enable data integrity, privacy, and compliance while using AI responsibly
5. **A promising future:** Free accounts teams to focus on strategy, judgment, and client relationships

Ready to see how AI can elevate your accounting game?

[Read the full article](#)

Blog

Powering the autonomous finance future with Genpact Finance One

Imagine shrinking finance close cycles from weeks to hours. Or asking your data a question in plain language and getting instant, actionable insights. That's what our strategic alliance with Databricks delivers.

Key features:

1. Centralized data access with a reporting marketplace powered by Databricks' Unity Catalog
2. Conversational AI to chat with your data
3. Connected planning workflows on a unified platform
4. Proactive alerts for trends, anomalies, and compliance

With up to 60% faster reporting, at least 5% earnings growth, and 50% lower costs, the future of finance is here.

[Learn more](#)

Point of view

Transform collections into a cash flow engine: A Genpact-Blackline playbook

Is your collections team chasing cash or burnout? Manual processes often mean your team is fighting a losing battle against volume. There's a smarter way.

Our new playbook, created with **BlackLine**, introduces the “Automate/Assist/Human” framework that combines powerful AI with deep process expertise to help you:

1. Automate routine follow-ups to capture the “long tail” of smaller invoices
2. Assist your team with an AI partner that flags risks and provides insights
3. Let humans focus on the high-value relationships that matter most

Turn your collections function into a strategic advantage.

[Find out how](#)

Point of view

Steering through tariff turbulence: A CFO's guide to staying ahead

Unpredictable trade tariffs can disrupt budgets, supply chains, and profitability. But with the right strategies, these challenges can become growth opportunities.

In this point of view, our F&A service line leader outlines key areas affected by tariff uncertainty – and what CFOs are doing to adapt.



Organizations that have invested in centralized data lake architectures possess a distinct advantage when it comes to scenario planning, particularly in adapting to tariff impacts.”

Ready to transform uncertainty into opportunity?

[Read the full article](#)

Point of view

Redefining risk: The agentic AI revolution in enterprise risk management

Risk management is evolving, and agentic AI is leading the charge. This game-changing technology is enabling comprehensive real-time audits, scalable third-party risk management, proactive cybersecurity, and more. Discover practical applications and a roadmap to integrate agentic AI into your risk protocols.

FF Agentic AI enables a more autonomous, strategic function that stays one step ahead of a rapidly evolving risk landscape.”

Dive into the future of risk.

[Read the point of view](#)

Article

How Genpact is shaping the future of Global Capability Centers (GCCs) as innovation engines

GCCs are becoming the heartbeat of innovation for the world's biggest companies. With gen AI and agentic AI, these centers are now creating solutions, not just processing tasks.

But getting there isn't easy.

Uncover insights on turning vision into action through:

- 1. Innovation enablement:** Adopting the latest tech and rethinking work
- 2. Governance and risk:** Managing compliance and finding the right people
- 3. Value realization:** Cutting costs while boosting worth
- 4. Digital advancement:** Building clear roadmaps to manage the shift

Ready to rev up your innovation engine?

[Read the full article here](#)

Case study

Banking on agentic AI: Turning AP challenges into opportunities

When a global financial institution faced inefficiencies in its accounts payable operations, it turned to Genpact for a transformative solution. The Genpact AP Suite – an agentic AI-driven platform – delivered measurable results:

1. **99%** reduction in manual workloads
2. **30%** decrease in revenue leakages
3. **Near-zero** duplicate payments

Curious to learn how they did it?

[Read the full case study](#)

Case study

Reimagining financial planning for sharper forecasts and superior decision-making

A global media and entertainment leader faced fragmented systems, siloed processes, and inconsistent data after a major merger. Genpact helped implement a centralized data lake, Oracle Cloud EPM, and unified planning processes. The impact:

1. Reduced planning cycles from 25 days to just 3 to 5 days
2. Improved forecasts with a unified planning model
3. Optimized costs and boosted collaboration and productivity

Learn more about how they turned complexity into clarity.

[Read the full case study](#)

Case study

Wesco leads the way in finance transformation with the Genpact AP Suite

When Wesco, a global distribution leader, aimed to transform its AP processes, it adopted the **Genpact AP Suite**, a comprehensive agentic AI-led solution that uses specialized AI agents for data extraction, exception handling, duplicate detection, and helpdesk support. Today, more than 3 million invoices are processed annually with zero human intervention, strengthening supplier relationships while cutting costs and saving time.

See how Wesco did it.

[Read the full case study here](#)

Case study

Plugging financial leaks with generative AI

A global food distributor faced a massive challenge: \$5 billion in supplier spend riddled with hidden errors, untapped income, and overwhelming data complexity.

They turned the tide with generative AI and advanced analytics, reducing financial leakage by **70%** and saving over **\$1 million** in just six months.

Dive in to uncover how the company transformed complexity into a healthier bottom line.

[Read the full case study here](#)

Case study

How Genpact unified data and boosted insights using Microsoft Fabric

At Genpact, we don't just talk about transformation – we live it. When we saw an opportunity to modernize our data ecosystem, we partnered with Microsoft Fabric to make it happen. The result? A unified, AI-powered platform that's reshaped how we work. We:

1. Migrated 15 terabytes of data
2. Connected 300 Power BI reports
3. Empowered over 2,000 users with real-time insights

From smarter HR decisions to streamlined finance processes, this transformation is driving innovation and operational excellence across the board.

[Learn more](#)

Closing thoughts

Reflecting on client insights gained throughout 2025, it's evident that AI agents are fundamentally transforming finance teams. Today's CFOs leverage agentic AI-driven tools to deliver organizational agility, precision, and operational excellence, shaping growth and driving transformational change.

When implemented effectively, the AI-powered finance ecosystem delivers real-time insights, streamlines processes, and enables smarter decision-making – creating lasting value and redefining success for tomorrow's finance leaders.

We hope the experiences and lessons in this AI agentic edition inspire you to lead with clarity and purpose as you drive meaningful innovation within your organization.

For more information, [visit the Genpact CFO Forum page.](#)



genpact.com/intelligence

Genpact (NYSE: G) is an agentic and advanced technology solutions company. We leverage process intelligence and artificial intelligence to deliver measurable outcomes. With a strong partner ecosystem and decades of client trust, we provide innovative solutions that transform how businesses run. Powered by a team with an active learning mindset and client centricity at its core, we deliver lasting value for the world's leading enterprises.

Get to know us at genpact.com and on [LinkedIn](#), [YouTube](#), [X](#), and [Facebook](#).

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