



Data Foundations Maturity Checklist for finance professionals

Assess your readiness for trusted, AI-enabled, and audit-ready financial operations that deliver measurable ROI.

1. Financial Data Architecture & Integration



Do you have a unified view of data across ERP, FP&A, and reporting systems?	
Are data flows mapped for ingestion, lineage, and security?	
Is integration between legacy and modern platforms seamless?	

2. Governance & Compliance



Are data policies aligned with PDPL/GDPR and internal security standards?	
Is role-based access and encryption enforced for sensitive data?	
Is proactive risk monitoring in place for audit readiness?	

3. Data Quality & Trust



Are there automated processes for validation and reconciliation?	
Is there a clear framework for managing provenance and lineage?	
Are data quality metrics tracked and reviewed by finance leadership?	

4. Operational Maturity



Are automation and process improvement embedded in finance workflows?	
Is there a defined maturity benchmark for financial reporting?	
Do you have a roadmap for continuous improvement?	

5. AI Readiness



Is your architecture designed for secure AI workloads?	
Are explainability and bias controls in place for AI outputs?	
Is there an investment plan for scaling automation?	

6. Executive Reporting



Can you provide board-ready insights on governance and AI readiness?	
Are ROI models quantified for finance data initiatives?	
Is there a prioritised roadmap for transformation?	

Score Yourself:

0 - 6 checks

High risk

Urgent need for data and governance improvements

7 - 12 checks

Developing

progress toward AI ready finance

13 - 18 checks

Mature

trusted, automated, and insight-driven finance

Get your finance data maturity benchmark and ROI model in 4 weeks.

Our Data Foundations Package provides a clear, board-ready business case for automation, reconciliation, and quality improvements, unlocking measurable cost and control benefits and laying the groundwork for AI-driven finance.

[Book your discovery call](#)

