

The Finance AI and Automation Playbook

7 Innovative Use Cases



Executive summary

Today's finance leaders are expected to perform at an elite level, accelerate reporting, ensure compliance and guide strategic decisions. It's not enough to keep pace; they need to outperform competitors.

At the same time, they're hamstrung by data spread across legacy ERPs, spreadsheets and disconnected tools. Manual processes are the equivalent of outdated coaching programs, slowing down these high-performance teams.

All is not lost, however. Artificial intelligence (AI) and automation are rapidly reshaping the playing field. Used well, these tools can deliver faster insights, uncover hidden savings and reduce the manual burden of reporting. The key is knowing where to focus your effort.

This playbook explores how finance teams can become AI-ready with practical examples and real-world case studies. It's one part training plan, one part motivational guide. By the end, you'll have a clear idea about how to use AI and automation to work smarter, faster and more strategically.



Pre-season training:

How to get your data AI-ready

Just as an athlete conditions their body in the run-up to a major event, enterprises need to prepare thoroughly before a new AI initiative.

While an athlete needs to perfect their diet and training plan, an enterprise needs to optimise its data.

Most finance teams still rely on fragmented ERPs, spreadsheets and manual reconciliations. But without centralised, cleaned and governed data, it's easy to end up with unreliable reports, incorrect forecasting and added compliance risk. Then, instead of driving efficiency, AI only amplifies existing data problems.

By building a foundation of high-quality, trusted data, finance teams can unlock the true value of AI.

In finance, "good data" is:

- Consistent and standardised across functions
- Accurate with duplicate entries removed
- Governed with clear audit trails for compliance

The 5Y Business Transformation Platform helps you become AI-ready by centralising financial, operational, and commercial data into a single governed layer. With embedded IT governance, auditability, and lineage, your data is compliant and reliable from day one.

We use AI from the outset when preparing your data to:

- Remove duplicate entries
- Cleanse inconsistencies
- Transform data into a standardised format
- Connect legacy systems, ERPs and other business applications rapidly

The result is a single source of truth that's fit for any AI-related purpose.

7 winning AI plays for finance and accounting teams

AI is no longer a distant promise — it's already transforming how finance teams work every day. From accelerating reporting cycles to improving compliance, here are seven practical applications of AI for finance leaders.

1

Cutting the fat:

Running spend analysis

Finance teams spend significant time reconciling invoices, purchase orders, and supplier data — often across multiple disconnected systems. This creates inefficiency and makes it hard to spot savings opportunities.

With centralised data and AI-powered pattern recognition, it becomes easy to compare supplier rates and spot anomalies such as duplicate invoices, inflated charges and irregular spending patterns. From here, cost-saving opportunities become clear.



Case in point

Origin Enterprises, a leading agribusiness, used 5Y's platform to automate the flow of data across a fragmented ecosystem of ERP, HR, and operational systems. By using Myles, our conversational AI chatbot, to capture and analyse data from invoices, Origin eliminated hours of manual processing, identified hidden spend patterns, and renegotiated supplier rates to achieve £30,000 in savings.

2

Quick off the blocks:

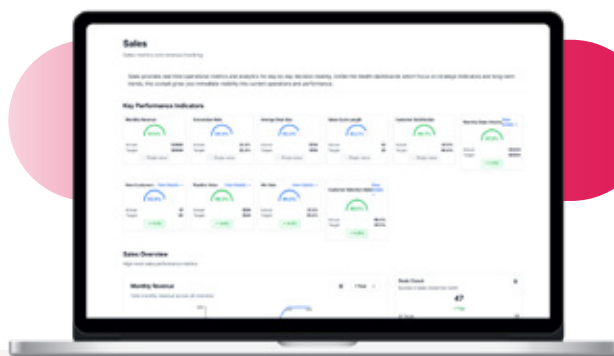
Real-time reporting and boardroom packs

Finance teams know all too well the pain of spending weeks pulling together numbers from ERP, CRM and operational systems, only to deliver reports that are out of date by the time they reach executives.

Automation changes the status quo... By combining centralised, governed data with pre-built templates, finance teams can generate board packs, monthly financial reports and compliance dashboards in minutes, not weeks. These templates also provide a flexible foundation for bespoke reporting, enabling teams to adapt outputs at speed and visualise information in the way they prefer to see it. With

AI support, ad-hoc queries can also be answered instantly via natural language, reducing dependence on IT or analysts.

This means finance leaders can deliver faster, more accurate insights on demand — empowering the business to make decisions at pace without waiting for the next reporting cycle.



3

Predicting future performance:

Iterative forecasting and scenario analysis

With AI, finance teams can run iterative forecasting cycles, modelling multiple scenarios in minutes. For example, by feeding interest rate changes, inflation data, or commodity price shifts into 5Y's platform, leaders can instantly see how revenue, cash flow, or margins might be affected.

This approach transforms forecasting from a slow, one-off task into an ongoing, dynamic process.

The ability to simulate outcomes, assess risks, and adjust plans on demand gives finance leaders true agility. Instead of reacting after the fact, organisations can prepare for multiple futures and scale forecasting more easily.

Crucially, AI reduces key-man dependency by learning how models operate, ensuring that forecasts can be maintained and adapted even if the original developer is unavailable.



4

Finishing strong:

Closing the books faster with automation

By using automation, finance teams can dramatically reduce the burden of period end, streamlining data entry, reconciliations, and anomaly detection.

Journal entries, intercompany reconciliations and variance checks can be automated using governed, AI-ready data pipelines. Anomaly detection algorithms flag outliers instantly, ensuring teams can focus on resolving issues rather than searching for them.

This means faster, more accurate period ends, reduced risk of error or compliance breaches and more time freed up for strategic analysis and decision support.

5

Watching game tape:

Summarising the latest news and research

Without automation, valuable time is lost condensing regulatory filings, compliance updates, and market insights into usable insights. But with Natural Language Processing (NLP) and generative AI tools, teams can extract key information in seconds.

By summarising lengthy reports, AI can extract the key insights, flag relevant risks and even generate rundowns tailored to specific audiences. This frees up analysts from manual reviews and accelerates regulatory compliance. In short, finance teams can stay on top of constant changes without burning out resources.

Staying clean:

Accelerating ESG reporting and compliance

ESG reporting has become a board-level priority, but for most finance teams it remains a manual, painful process. Data is spread across spreadsheets, systems, and business units, and aligning it with frameworks such as CSRD requires endless collation and reconciliation.

AI and automation transform this process. With 5Y's Engineering Suite, ESG data from both structured (e.g., energy consumption, supplier records) and unstructured (e.g., PDF reports, disclosures) sources can be ingested, standardised, and cleansed automatically. Embedded governance ensures every data point is auditable and aligned with a common model.



The Transformation Suite then brings ESG to life through:

- Pre-built dashboards aligned to CSRD frameworks
- KPI traceability and tracking for complete transparency
- Myles, 5Y's AI assistant, for dynamic ESG analysis and ad-hoc queries

The result is audit-ready ESG reports that are delivered in weeks, not months. And because the same foundations support multiple use cases, much of the heavy lifting done for ESG reporting can be reused across other areas.

Coaching your squad:

Talent management and career progression

AI isn't just for data. It can also help finance leaders manage their teams more effectively, reducing admin while boosting employee engagement.

Practical applications include:

SMART goals: AI can generate role-specific objectives that align with corporate strategy.

Policy queries: Instead of searching through HR portals or policy documents, staff can ask an AI assistant questions and get instant answers.

Career development insights: AI can track workloads, highlight skill gaps, and help design training courses/ knowledge articles, helping finance leaders support employee progression.



Avoiding unforced errors: The AI risks and roadblocks you'll need to overcome

Proper planning prevents poor performance. Winning teams give themselves the best chance of success by preparing for risks and always playing by the rules.

This is particularly important in the AI space, where, despite its potential, the technology is fraught with risks.

Finance leaders must build trust and adoption across their teams by addressing these concerns head-on. Choosing transparent governance, rigorous controls and, ultimately, the right partner are essential steps to ensuring AI delivers value without creating new liabilities.



Here are the risks and roadblocks your team will need to overcome on the path to success:

Bias issues

AI models learn from historical data. If that data reflects existing biases, those patterns can be reinforced by the model and baked into future decisions. For finance teams, this can lead to issues like compliance breaches and flawed risk modelling.

Proofing & accuracy

Generative AI has a well-documented issue with “hallucinations” — outputs that are confidently expressed but factually wrong. Left unchecked, these insights could directly impact forecasts, reporting, or compliance.

Security & data privacy

Using insecure AI tools can result in compliance breaches, missing audit trails and even regulatory penalties. While finance teams can use Microsoft Purview to monitor AI usage and prevent unauthorised access or risky activities, cloud-based AI tools may use proprietary data in external training models. The only way to protect sensitive financial or operational information is to ensure it never leaves your control.

Governance and compliance

Staying compliant with frameworks like GDPR, SOX, and CSRD can become extra challenging when using AI tools. To avoid risk, every AI-enabled process must be held to the same standards as core finance systems; this means full audit trails, clear data lineage, and embedded governance that shows exactly where data originated, how it was transformed, and who had access.

How 5Y can help

At 5Y Technology, we're dedicated to helping you achieve peak corporate performance. We've designed our Business Transformation Platform to overcome all the risks and challenges associated with AI in finance, putting you on the path to predictable wins, sustainable growth, and compliant performance.

✓ **Proprietary models, not public training sets:**

5Y does not use corporate data to train external algorithms. Your data remains private, protected, and controlled.

✓ **Governed foundations:**

Embedded lineage, auditability, and access controls ensure every AI-assisted action can be traced and verified.

✓ **Validated outputs:**

All AI insights in 5Y are generated on top of clean, governed datasets, reducing the risk of hallucinations or unreliable results.

✓ **Security-first design:**

5Y is built on enterprise-grade environments such as Azure and Snowflake, with encryption, compliance certifications, and modular governance baked in.



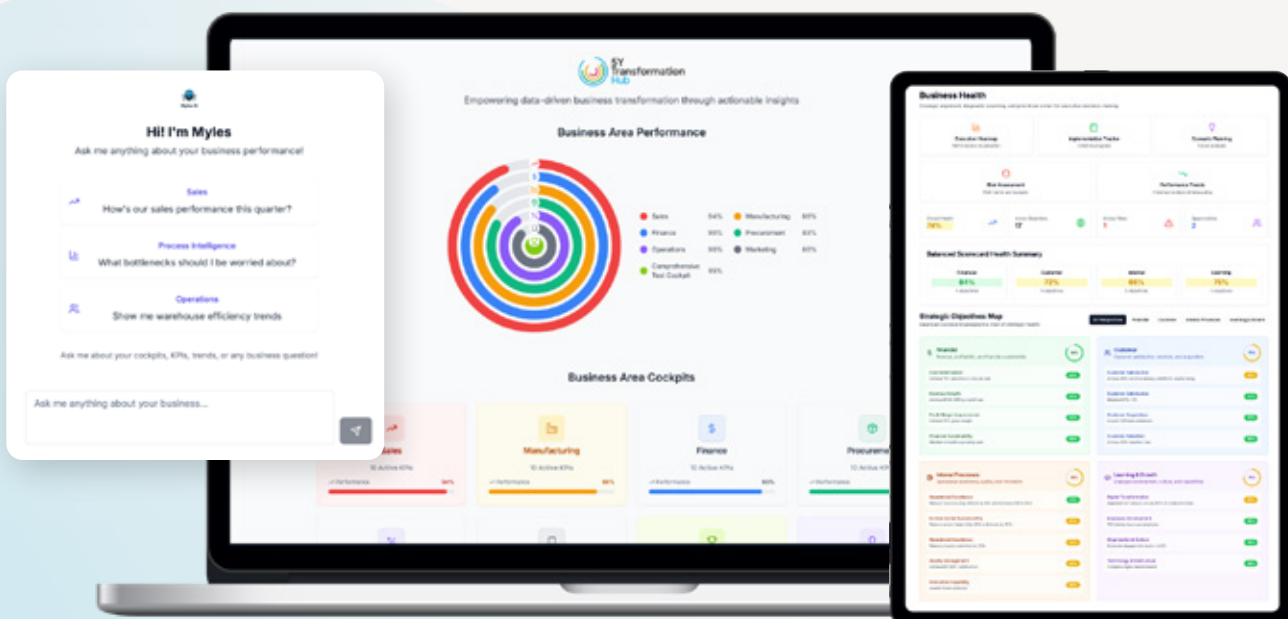
The 5Y Business Transformation Platform

The 5Y Business Transformation Platform gives finance leaders a fast, cost-effective way to access AI insights by centralising fragmented systems, cleansing and standardising data, and embedding governance from the ground up.

Myles, our conversational AI assistant, allows you to investigate data directly. Instead of waiting on analysts or IT, you can ask natural-language questions and get instant, trusted answers.

For finance teams, this means:

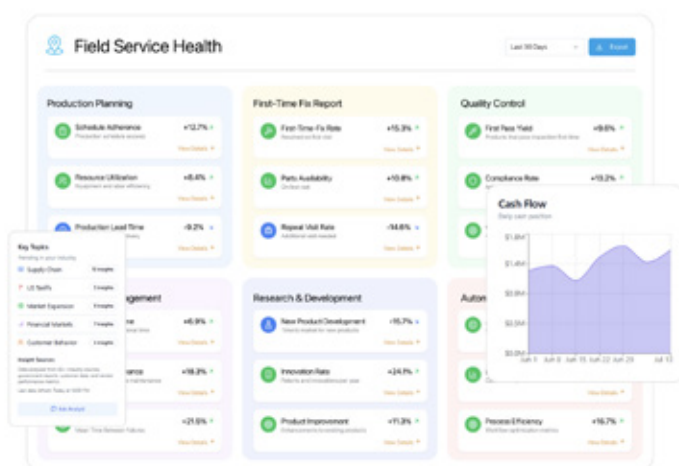
- ✓ **50% faster deployment** compared to traditional consultancies
- ✓ **80% of reporting and integration needs delivered out of the box**
- ✓ **Real-time dashboards** that replace manual reporting cycles
- ✓ **Scalable, governed architecture** that evolves with your business
- ✓ **A move from reactive reporting to proactive decision-making**



The platform in action

Bringing automation and auditability to ESG compliance

Origin Enterprises, an international agri-services group, deployed the 5Y Business Transformation Platform to automate the flow of ESG and CSRD reporting data across a fragmented ecosystem of ERP, HR and operational systems.



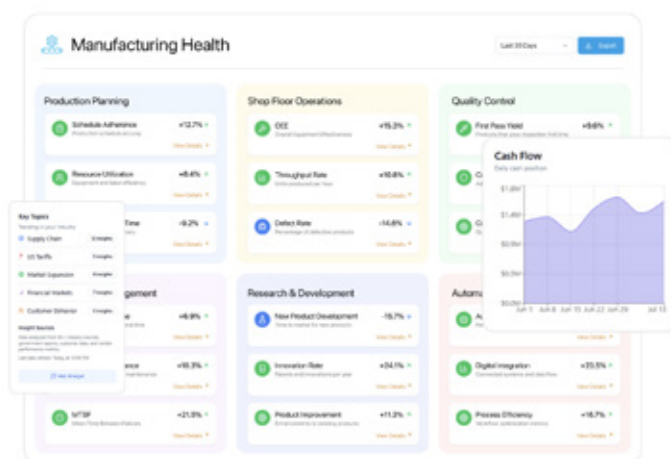
By centralising insights and using AI to capture data from invoices, they significantly reduced manual effort, generating an audit trail and delivering real-time trend analysis via dashboards.

From here, Origin identified inefficiencies in its procurement processes and successfully renegotiated supplier rates — achieving £30,000 in direct savings while also improving cost visibility.

The platform in action

Simplifying reporting, reducing overheads

With decentralised systems and manual reporting processes, European manufacturing company, BEWI, struggled to understand profitability across the order-to-delivery lifecycle. Finance teams lacked clarity on cost drivers and fragmented data made reporting slow, error-prone, and resource-intensive.



By implementing 5Y, BEWI replaced manual reporting with a unified, governed data layer. The platform delivered 200+ calculators and 80+ KPIs, giving finance leaders the ability to track costs, margins, and performance indicators in real time.

With this foundation, BEWI reduced accounting costs by more than 50% and built a scalable base for future automation and analytics.



Cut manual effort, access predictive insights, and stay compliant more easily.

Find out how 5Y could support your AI journey as a finance leader.

[Request a proof of concept](#)

You can expect: *

80%

of your BI analytics ready out of the box from day one

50%

faster implementation, freeing up your team's time and budget

50%

reduction in data engineering costs

About 5Y Technology

Our platform, solutions and company are dedicated to disrupting the traditional technical landscape and powering performance through data. We aim to be the catalyst for a world where data-driven operations and decision-making are the norm, enabling organisations to unlock their full potential and achieve sustainable success.

Learn more about us by visiting 5ytechnology.com
[Contact us online](#) or email hello@5ytechnology.com

*The "80% analytics-ready" figure applies specifically to engineering tasks such as data ingestion, integration, and preparation. The 50% faster implementation and 50% reduction in engineering costs are based on our observed averages across typical client projects. Actual results may vary depending on project scope, data quality, and unique business requirements.

