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Are You Operating Like  
a Modern CFO?

## What leading finance organizations are doing differently to modernize, scale, and lead through uncertainty

Today's Chief Financial Officers are responsible for far more than financial stewardship. They are expected to ensure the finance operating model is modern, resilient, and forward looking; capable not only of reporting what happened, but of helping the business decide what to do next.

That shift has changed the role permanently.

In many organizations, finance is the function expected to connect strategy to execution: translating volatility into scenarios, turning data into decisions, and ensuring that growth does not outpace operational control. Boards want faster answers. CEOs want sharper forecasts. Business leaders want finance to be a proactive partner rather than a downstream checkpoint.

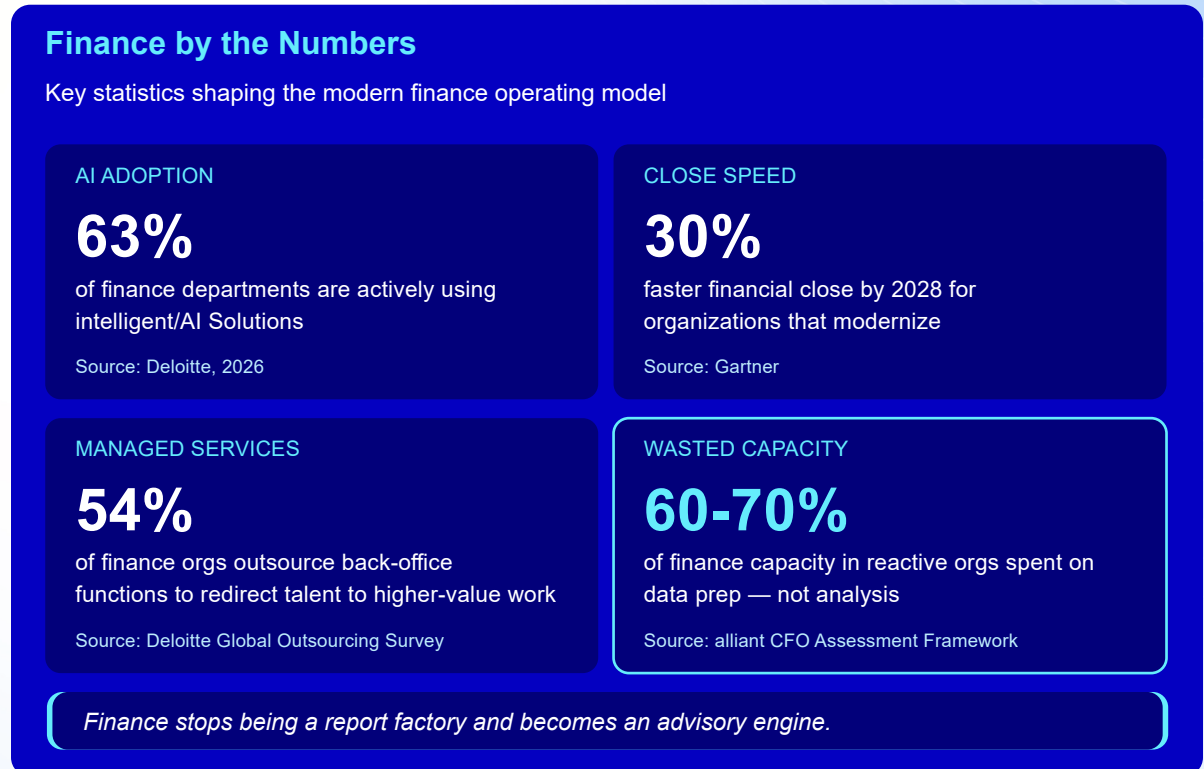
A gap is opening between average finance organizations and leading ones.

This paper examines what leading CFOs are doing differently, where finance organizations are getting stuck, and how enterprise finance leaders can assess where they rank among their peers.



# 🌀 The CFO Mandate Has Expanded and Expectations Have Risen with It

Today's CFO is increasingly expected to forecast internal and external change, improve capital allocation under uncertainty, deliver faster and more dynamic scenario planning, modernize data and reporting infrastructure, guide technology investment with clearer ROI discipline, and help the enterprise scale without proportionally increasing cost.



That evolution is reflected broadly across the market. In a 2026 finance technology perspective, it was noted that most finance departments are already piloting new capability models, with **63% actively using AI solutions** in finance — underscoring how quickly experimentation is becoming expectation.<sup>(1)</sup>

Gartner similarly projects that finance organizations using cloud ERP applications with embedded intelligence will see a **30% faster financial close by 2028**, provided they navigate data quality, integration, governance, and change management effectively.<sup>(2)</sup>

These signals matter because they point to a broader truth: the market is moving from asking whether new operating models belong in finance to asking which finance organizations are building them successfully.

Successful businesses are modernizing because their current model — fragmented systems, lagging insight, and manual dependency — cannot keep pace with enterprise demands.

# 🌀 The Gap Is Not Effort. The Gap Is Architecture.

One of the clearest patterns in underperforming environments is friction accumulating quietly. Data lives in too many systems. Reporting depends on reconciliation by hand. Insight arrives too late to shape the decision. Scenario analysis is possible but labor intensive. Growth requires more headcount because the model does not scale.

That is not a **talent** issue. It is an operating model problem.

## Finance Maturity Model

Where does your organization fall on the path to strategic finance?



**Stage 1: Manual and Slow.** Organizations constrained by spreadsheet-heavy workflows and people-dependent processes where every output requires significant human effort to produce.

**Stage 2: Siloed and Reactive.** Organizations that have made investments, but whose systems do not work together, leaving teams spending the majority of their time extracting, validating, and reconciling data rather than analyzing it.

**Stage 3: Structured and Predictive.** Organizations that have built more trust in their systems and forecasts but now face the challenge of scaling without proportionally adding cost and complexity.

**Stage 4: Integrated and Strategic.** Organizations that have moved beyond visibility toward enterprise-wide impact, using finance as a blueprint across operations, planning, and growth.

This maturity progression is important because it reframes modernization. The real question becomes whether finance is architected to create strategic advantage.

## 🌀 What Leading CFOs Are Doing Differently

### They Think About How Work Gets Done, Not Just What Tools They Have

One of the most important shifts for finance leadership is moving from a technology-first mindset to a work-design mindset. The question is not which platform to buy. The question is how work should flow, who or what should be doing it, and where human judgment adds the most value.

Leading CFOs are designing finance operating models that blend the right mix of resources: skilled internal talent focused on strategy and judgment, managed services handling execution-heavy and recurring work, intelligent automation and agents managing structured and repeatable tasks, and technology connecting it all into a coherent system.

That blend looks different for every organization. But the principle is consistent. Free your best people from tasks that do not require their expertise, so they can focus on the decisions, strategy, and relationships that actually move the business forward.



### They Prioritize Integration Over Addition

One of the biggest mistakes finance organizations make is layering new tools and point solutions on top of disconnected processes. More technology does not automatically create more capability.

Organizations already possess much of the functionality they need. The issue is that ERP, CRM, operational, planning, and reporting systems often do not communicate in a way that supports real-time decision-making. The most competitive leaders are maximizing existing investments by prioritizing integration over addition.

This is more than a technology choice. It is a strategic discipline.

Instead of asking what new platform or solution to buy, ask where handoffs are breaking down, where data is being recreated, and where finance is compensating for system fragmentation with labor. In siloed and reactive organizations, teams often devote **60 to 70 percent of finance capacity** to extracting, reconciling, and validating data rather than analysis. Even where that figure varies by company, the implication is clear: many teams are overinvesting human effort in preparation and underinvesting it in decision support.

## They Use Managed Services to Extend Capacity Without Expanding Headcount

One of the clearest differentiators between reactive and modern finance organizations is how they think about capacity. Modern organizations design for scale. Reactive organizations add headcount when workload grows.

Managed services have become a core part of how leading businesses accomplish this. By partnering with firms that bring skilled talent, process discipline, and execution capability, leaders can extend their team's reach without the overhead, risk, and time cost of hiring. This is especially valuable in areas like financial reporting, accounts payable and receivable, reconciliation, compliance support, and close management; work that is essential but does not require the strategic judgment of your senior professionals.

According to one global survey, **54% of finance organizations** now outsource some portion of back-office finance functions, and the primary driver is not cost reduction alone. It is the ability to redirect internal talent toward higher-value work.<sup>(1)</sup>

## They Build Incrementally, Not Theatrically

The most successful transformations happen in phases. That may sound obvious, but it runs counter to how most initiatives are sold internally — as sweeping reinventions with large platforms, ambitious timelines, and too many moving parts.

Instead, consider a sequence that makes operational sense: integrate data, automate reporting, accelerate the close, introduce predictive analytics, and layer in intelligent agents where they improve speed, quality, or scale.

This philosophy aligns with broader market guidance. Gartner notes that embedded intelligence in finance can unlock substantial gains, but only when organizations address data quality, skills gaps, governance, and complexities alongside the technology itself.<sup>(2)</sup>

In other words, leading CFOs do not confuse ambition with readiness. They design the path.



## They Deploy Agents and Automation Where Judgment Is Not Required

Increasing new models include intelligent agents and automation to handle structured, repeatable, and rules-based work. This is not replacing your professionals. It is removing work that should never have required them in the first place.

Agents and automation are most effective in finance when applied to tasks like data extraction and normalization, report generation, reconciliation, monitoring, and compliance tracking. When those tasks are handled systematically, professionals can redirect their time toward interpretation, scenario planning, stakeholder communication, and strategic advisory.

## They Design Finance for Scale

As organizations grow, many businesses absorb a higher workload through more people. That can work for a while, but it eventually becomes expensive, fragile, and difficult to manage, especially when quality talent is increasingly harder to find.

There's a bigger question: can finance support two or three times the current volume of work without proportionally expanding headcount?

High-performing organizations have moved beyond process improvement toward scalability. In practice this includes standardized workflows across business units, automated close and reporting activities, self-service dashboards, predictive models that update with changing drivers, managed services, and operating models that reduce dependence on tribal knowledge.



## 🌀 Where Do You Rank Among Your Peers?

Enterprises should ask a direct set of questions:

1. Do we have real-time visibility into the drivers affecting performance, or are we always a step behind?
2. How much of our finance team's time is still spent preparing data rather than advising on it?
3. Are our systems integrated enough to support faster, more confident decisions?
4. Can our planning processes adapt as assumptions change, or do we rebuild them from scratch each cycle?
5. Can finance support meaningful growth without proportional increases in headcount?
6. Are we using managed services, agents, and automation to extend capacity — or are we adding people to solve problems that should not require people?
7. Finance helping shape enterprise strategy, or reacting to it?

These are indicators of current competitiveness. The market is not standing still. What looked advanced eighteen months ago — faster dashboards, partial automation, weekly visibility — has quickly become pedestrian. Those pulling ahead are not collecting point solutions; they are turning modernization into a coherent operating model.



## **The Throughline: Modern Finance Needs More Than Tools**

The organizations making the biggest gains are not doing so simply because they bought better software or deployed the latest technology. They are curating the right information, focusing on the right priorities, sequencing transformation intelligently, and building finance capabilities in a way that supports enterprise strategy.

That means thinking carefully about how work gets done across the entire operating model — not just which tools sit in the stack. It means combining the best talent with the right support. It means using managed services to extend capacity without adding overhead. It means deploying agents and automation where people are not required, so your best people can focus on the work that is. And it means integrating everything into a system that scales with the business rather than straining under it.

That is how work should get done.

alliant's position in this space is built on exactly that. As a growth partner to businesses for over 25 years, we bring perspective from across industries to navigate the complexity that determines whether a transformation actually delivers value. Be it managed services, technology integration, intelligent workflow design, or strategic advisory, the approach is always the same: understand where you are, understand where you need to go, and build toward it in a way that works.

That is the question CFOs should be asking now; before the distance between reactive finance and strategic finance becomes harder to close.



## Sources

<sup>1</sup>Deloitte: The CFO Guide to Tech Trends 2026

<sup>2</sup>Gartner: 30% Faster Financial Close by 2028

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As alliant's Vice Chairman of Managed Services, Joe plays a key role in shaping the firm's strategic initiatives and guiding its vision for the future of finance and operations. With over 35 years of experience, Joe has dedicated his career to helping organizations successfully navigate the intersection of talent, technology, and managed services to achieve scalable, sustainable growth.

His extensive background includes multiple C-level roles, such as CEO of a digital marketing and managed services firm and Vice President of Global Solutions for a global staffing and outsourcing provider. As a founder of two companies and a seasoned leader across industries, Joe brings a deep understanding of how modern organizations must design and evolve their operating models to move beyond manual execution and unlock strategic advantage.

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