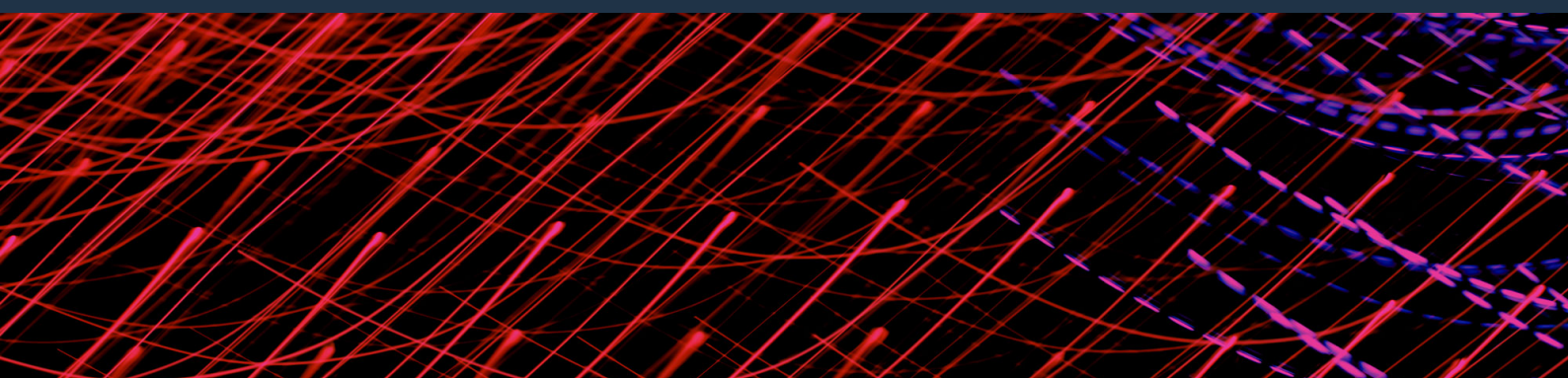


THOUGHT LEADERSHIP

How AI and Automation can Unlock Operational Efficiencies and Drive Value Creation



As businesses navigate an increasingly complex landscape, AI and automation are becoming established tools for CFOs to unlock operational efficiencies and drive value creation.

“Your AI is only as good as the data you feed it,” says James Trinder, Vice President of Solution Consulting at Oracle NetSuite.

Indeed, the power of artificial intelligence is directly tied to the quality of the data it processes. Without a centralised and integrated data system, AI models are limited in their ability to generate accurate insights, automate processes, and improve decision-making. In today’s fast-paced business landscape, where agility is key, companies should take steps to have their data well-structured and accessible to fully harness AI’s potential.

This is why AI and automation are driving efficiency and value creation. AI, by definition, refers to systems designed to mimic human intelligence, capable of performing tasks such as problem-solving, pattern recognition, and decision-making. Through the automation of routine and repetitive tasks, AI can streamline operations and help to unlock new insights allowing organisations to focus on more strategic initiatives.

But AI doesn’t operate in isolation. Its success is closely linked to cloud computing, which provides the foundation for scalable and integrated data management. Powerful AI outcomes can emerge when businesses unify data across all core functions—accounting, finance, sales, marketing, customer support, supply chain, and inventory—into an ecosystem. The more structured and comprehensive the data, the more valuable it becomes for AI-driven insights and decision-making.

For CFOs, this presents a significant opportunity to leverage AI where it matters

most—within enterprise resource planning (ERP), business management, finance systems, and operations, among others. With AI’s capacity to understand, interpret, and generate new insights from data, CFOs and their teams in particular stand to benefit.

Challenges reshaping business

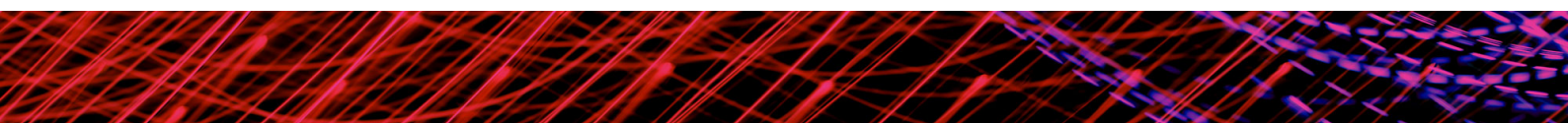
Amidst accelerating change, businesses face increasing pressure to rethink their strategies, embrace new technologies, and maintain a competitive edge.

From shifting market conditions to internal structural hurdles, businesses today must navigate a complex mix of external and internal challenges that shape their operations and strategies.

According to an IDC report titled [“The Future of Enterprises and Their Applications”](#), some of these challenges, like growth of business ecosystems and the emergence of disruptive technologies, act as tailwinds, driving growth and innovation.

Others, such as inflationary pressures and value-chain disruptions, create headwinds, slowing progress and introducing obstacles. Less predictable crosswinds, including changing workforce dynamics and growing ESG scrutiny, can alter an organisation’s direction, adding an extra layer of uncertainty.

“Organisations that adapt to external forces and internal challenges can turn obstacles into opportunities. To respond to volatility and set themselves up for sustainable growth, they need to establish a structured approach that brings together people, processes, technology—including AI and automation—and centralised data,” says Ham Patel, COO, Vice President at Oracle NetSuite EMEA.





Foundations of future-proofed businesses

For this approach to be effective, four elements—people, processes, technology, and data—must work in sync. When aligned, they can help break down silos, create operational transparency and enable data-driven decision-making – allowing organisations to innovate and swiftly adapt to evolving conditions.

“One of the key challenges CFOs face is the existence of siloed data across the organisation. AI can act as a catalyst for breaking down these silos, enabling collaboration between different departments and providing a single source of truth,” says Trinder. Having a central data repository is key in helping AI remove silos, by making it easily accessible for AI to pull data from different systems and integrate it into an ERP, enabling consistency across the platform. AI algorithms can analyze historical data to predict future trends and patterns, enabling better decision-making based on comprehensive data analysis across the business, and the CFO can lead this charge.

Beyond improving just one department in a business, an AI-savvy finance team creates a domino effect across the broader organisation. CFOs can reap significant benefits from cross-departmental AI adoption, and they are well placed to take a proactive role in driving this initiative throughout their organisation. Working closely with other internal leaders and stakeholders, CFOs can help establish a collaborative and data-sharing culture that maximises the benefits of AI.

The [Future of Enterprises and Their Applications](#) report states that 57% of organisations consider generative AI capabilities as highly important or critical when selecting new business applications.

Technology plays a crucial role in bringing these four elements together. It acts as the foundation that supports organisational agility and resilience, enabling businesses to be equipped to navigate an ever-evolving landscape and remain future ready.

The pillars of a modern business include agility and scalability; resilience and efficiency; a connected enterprise; compliance; sustainability; and accelerated innovation, according to the report.

Sustainability and Scalability

“The leading drivers to delivering a sustainable organisation are improving operational efficiency, reducing costs, aiding in compliance, creating business value, which all are supported by technology,” Patel explains.

The rapid proliferation and convergence of technologies such as cloud, AI, and analytics, help organisations navigate uncertainty and unlock new opportunities at scale, the report finds. More specifically, cloud adoption is a crucial step in building a modern, agile, and scalable business.

Cloud-based applications can boost visibility with robust monitoring and analytics tools, enabling organisations to address potential issues proactively. They can foster a culture of learning and experimentation, driving innovation and adaptability. Additionally, automation and intelligent workflows can be applied to streamline operations,

improve efficiency and responsiveness. Updates are also easier to install for standardised cloud-based applications, requiring less validation and verification while reducing disconnects and breakdowns in essential operations.

Moreover, migrating from traditional infrastructure can further reduce pressure on in-house capacity, skill availability, and costs.

The report highlights that 58% of organisations prioritise resilience and risk mitigation. To achieve this, businesses should consider embedding multiple layers of resilience, risk management, and efficiency throughout their operations.

AI and automation to drive value creation

“Automation and AI are innovation enablers and accelerators; they speed up decision-making, automate routine tasks, identify trends, and allow for rapid risk assessment. They empower the office of the CFO with insights, recommendations, and time to focus on value creation activities,” Patel notes.

Indeed, the report finds that among the areas that organisations see tangible benefits from the use of AI include the freeing up of resources for innovation due to less time spent on menial tasks (54%), faster decision-making (43%), and business visibility (42%).

“In businesses with high volumes of document review and processing, AI can deliver improvements in both efficiency

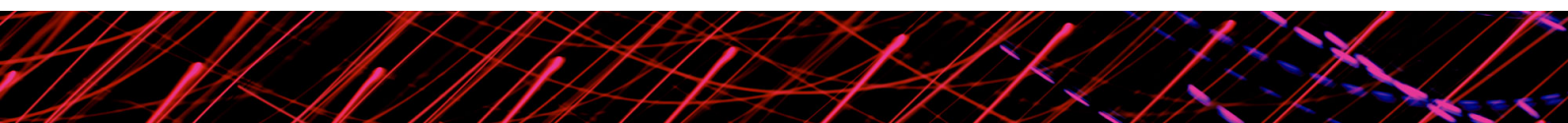
and often even more importantly accuracy. This is typically a two-step process: first, standardising workflows, which is often the bigger challenge in more complex organisations and then applying AI to automate,” Alex Mathers, Partner – Value Acceleration at Inflexion.

Agata Cooper, Digital Operating Partner at Triton Partners, notes that there is a breadth of AI use cases across Triton Partners’ portfolio companies, spanning various stages—from pipeline to deployment. These use cases range from marketing and sales, including pricing and lead generation, to product and services like field operations and predictive maintenance.

“In operations and support, AI is driving process automation in design, engineering, and customer service. A particular focus has been AI agents for developers, document translation for product specs and marketing messages, and AI driven medical note taking”, adds Cooper.

Organisations are increasingly focused on creating systems that can scale while maintaining efficiency, and AI provides the tools needed to achieve this balance with the same human capital resources.

“With increasing automation handling repetitive tasks, there’s a growing need for employees who can interpret complex data and derive actionable insights,” Trinder says. “This shift is impacting hiring strategies, as there is a move away from manual number-crunching roles towards roles that demand critical thinking.”





AI shaping the future

This shift in workforce dynamics not only redefines job roles but also reshapes how businesses operate, as AI and automation evolve from mere efficiency tools to essential drivers of strategic growth.

To future-proof an organisation, leveraging cloud-based applications, AI, and analytics is essential, as these technologies offer the agility needed to navigate uncertainty and prepare for future disruptions.

For CFOs and business leaders, embracing AI-driven solutions offers a clear strategic advantage, allowing them to focus on innovation while automation takes care of routine tasks.

“AI’s role for a CFO is key, especially in harnessing vast amounts of data that humans simply can’t process at the same speed or depth. The ability to distil micro-data, aggregate insights at different levels, and generate predictive outputs will redefine decision-making. AI is set to provide unprecedented foresight, particularly in M&A,” says Manfred Puffer, Operating Partner at Apollo.

Looking ahead, AI and automation are set to unlock significant opportunities for value creation by helping to make smarter decisions, improving efficiency, and reducing operational costs. This does not only apply only to the office of the CFO but spans the entire enterprise, impacting various functions and boosting overall productivity.

For those interested in the topic, mark your calendars for **Actum Group’s Value Creation Forum** on 18 March 2025, featuring panels that will delve into it.

To find out more, [click here](#).

Panel:

The CFO and Finance Function Role in Value Creation

Speakers:

Ham Patel, COO Vice President, Oracle NetSuite;

Thomas Dixon, MD Portfolio Operations, Blackstone;

Paul Reading, Partner – Chief Strategy Officer, Mayfair Equity Partners;

Manfred Puffer, Operating Partner, Apollo;

Mahshid Hadavinia, Senior Director – Private Equity Performance Improvement, Alvarez & Marsal.

Panel:

Levering GenAI to Unlock Operational Inefficiencies

Speakers:

James Trinder, Vice President, Solution Consulting, Oracle NetSuite;

Agata Cooper, Digital Operating Partner, Triton Partners;

Alex Mathers, Partner – Value Acceleration, Inflexion;

Marja Verbon, Head of Innovation Acceleration, Five Arrows,

James O’Day, MD & Head of Innovation, CVC;

Victoria Pereira, ED & Private Equity Data Science Lead, Goldman Sachs Asset Management.