



The Agentic Close: From Month-End Sprint to Always-Ready Finance

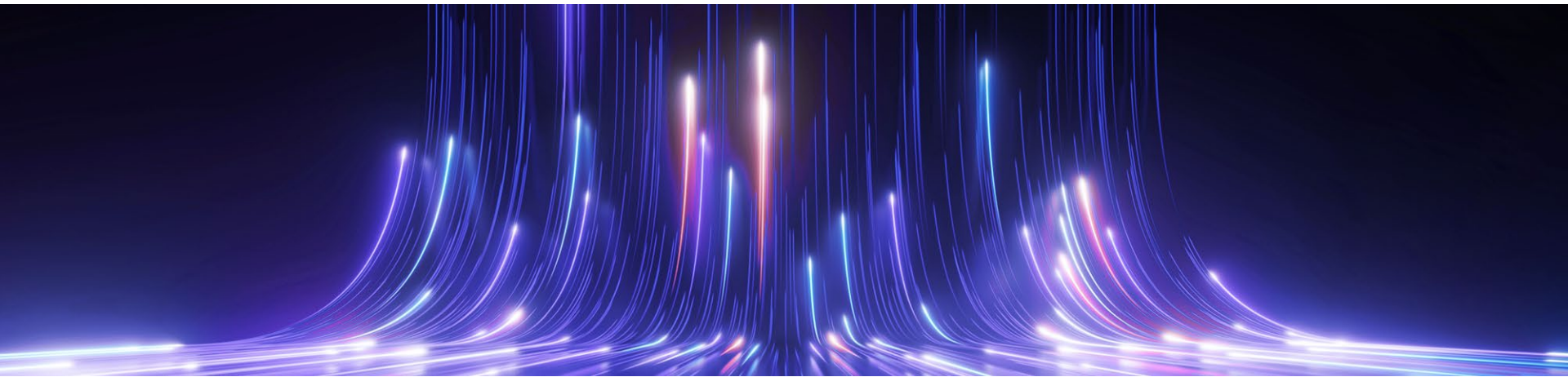
Webcast Summary

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March 19, 2026

Reimagining finance: Accelerating the close process with agentic AI

Is your finance team perpetually caught in a reactive cycle, racing to close the books instead of shaping business strategy? In this webcast, KPMG leaders went beyond incremental automation to reveal how a more agentic operating model can help enable a more continuous and near-real-time close process. They helped attendees discover how to leverage an AI-powered close command center to slash decision latency, support broader transaction coverage to enhance compliance efforts, and support a shift toward a more strategic role for accounting functions. Participants learned the pragmatic steps to build their own roadmap, starting with existing systems to maximize ROI, and gained a blueprint for creating a more intelligent, resilient, and forward-looking finance organization.



Panelists discussed the following topics



From Automation to Autonomy: Designing Intelligent Agents

Agentic AI is engineered to understand a desired outcome, then independently reason and execute the necessary tasks across an organization's existing software landscape.



Your Strategic Cockpit: The AI Close Command Center

The AI close command center is a centralized dashboard providing real-time, persona-specific insights into the financial close process and the activities of AI agents.



Exception-First Finance: Modernizing the Close Process

A modern, exception-first approach shifts the finance team's focus from manual checklists to managing high-value exceptions while AI handles routine tasks.



Building Your Roadmap: A Practical Guide to Agentic AI

Pragmatic design principles and strategic steps provide a clear, measurable roadmap for successfully integrating agentic AI into core finance functions.

Pinpointing the Pain in Your Financial Close

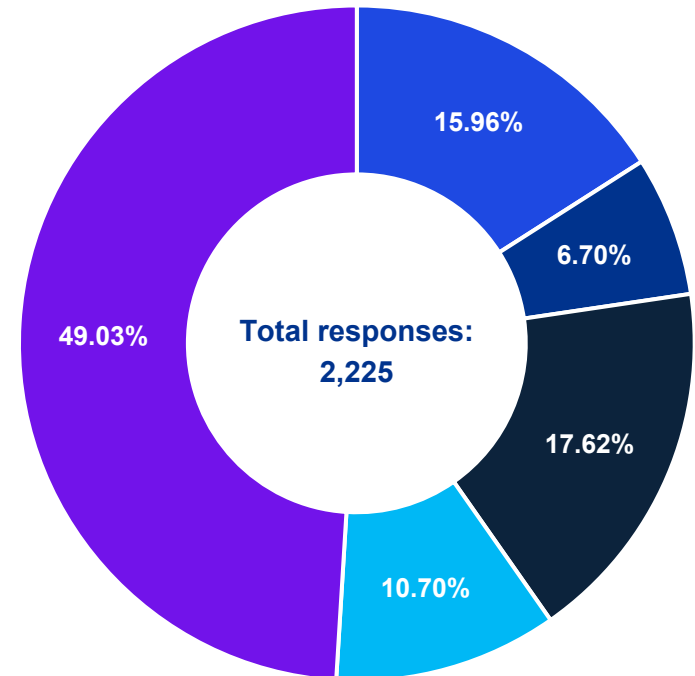
The month-end close is a critical, high-pressure period for every finance organization. While the goal is a fast and accurate close, the path is often filled with challenges, from tedious manual processes and data reconciliation issues to a lack of clear visibility into the numbers.

Polling Question 1:

What is your single biggest challenge in the current financial close process?

Results indicated the primary frustration for nearly half of all finance professionals is a financial close process that is fundamentally too slow and manual.

Top Challenges in the Financial Close Process



- Generating timely reports and analysis
- High number of errors and reconciliation issues
- Lack of real-time visibility into the numbers
- Poor coordination across teams and systems
- The process is too slow and manual

Gauging Your AI Maturity Level

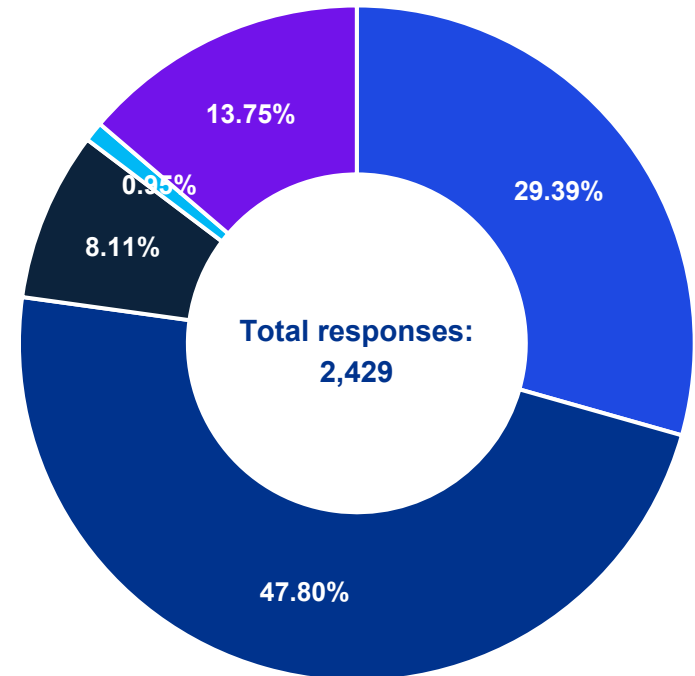
The journey from initial AI curiosity to full-scale adoption is a multi-stage process, with organizations moving from early exploration to active piloting and, eventually, embedding AI into their core operations. Understanding where your finance department currently stands on this spectrum provides crucial context for tailoring an effective adoption strategy.

Polling Question 2:

How would you describe your finance department's current stage of AI adoption?

Results indicated the vast majority of finance departments are still in the early stages of their AI journey, with nearly half just beginning to explore its potential and another third actively piloting solutions.

Current State of AI Adoption in Finance



- Actively piloting or testing AI solutions
- Just starting to explore AI's potential
- No current plans to implement AI
- We have a mature, integrated AI strategy
- We have implemented AI in specific areas

Identifying Your Barriers to Adoption

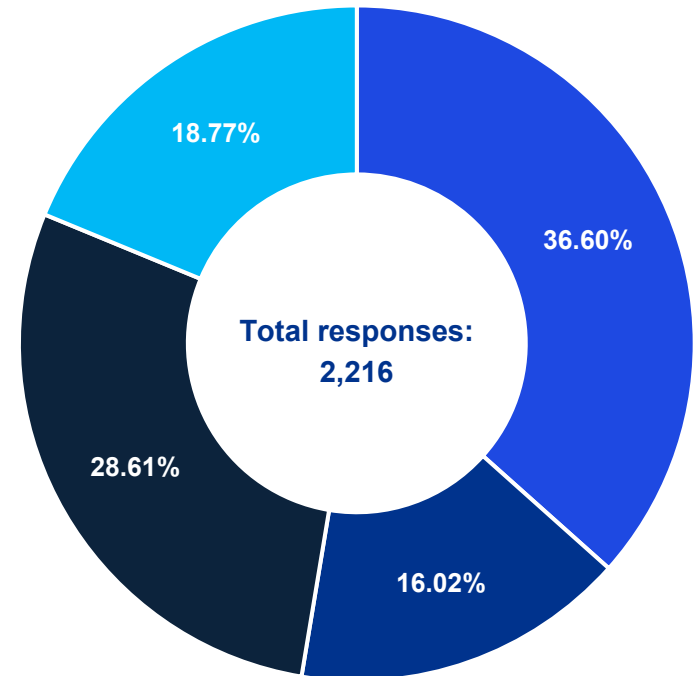
While the potential benefits of agentic AI are compelling, the path to implementation is not without its challenges. Concerns around data privacy, integration with legacy systems, the cost of implementation, and the availability of skilled talent are common hurdles that organizations must navigate.

Polling Question 3:

Which potential benefit of an AI closed command center is most appealing to your organization?

Results indicated that while all benefits are appealing, the most desired outcome from an AI Close Command Center is achieving a faster, more accurate close, which is seen as more valuable than even gaining real-time visibility.

Benefits of an AI Close Command Center



- Achieving a faster, more accurate close
- Automating reconciliations and flux analysis
- Gaining real-time, on-demand visibility into financial performance
- Increasing the strategic capacity of our finance team

Defining the Ultimate Prize: What's Your Top Benefit?

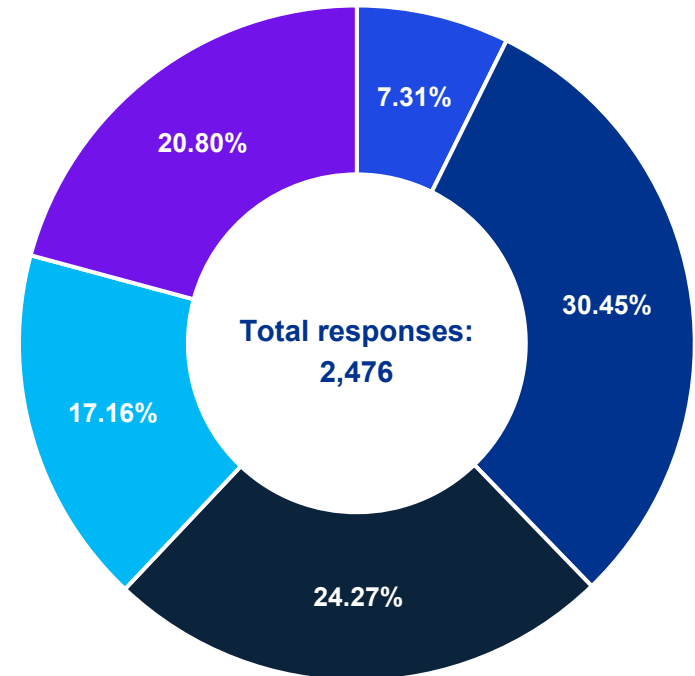
The concept of an AI-powered close command center offers a suite of powerful advantages, from achieving a faster, more accurate close to providing real-time financial visibility and freeing up teams for more strategic work. Different organizations will prioritize these benefits based on their unique pain points and strategic goals.

Polling Question 4:

When considering agentic AI for finance, what represents the most significant hurdle for your organization?

Results indicated the single biggest hurdle to adopting agentic AI in finance is not the technology itself, but the critical need to ensure robust data privacy, governance, and control over sensitive information.

Biggest Hurdles to Agentic AI Adoption



- Building a convincing business case for the investment
- Ensuring data privacy, governance, and control
- Integrating with our existing legacy systems
- Lack of internal skills and technical expertise
- The cost and complexity of implementation



Conclusion

The transition from a manual, sprint-based close to a continuous, "always-ready" model is now within reach through agentic AI. By embracing an exception-first mindset and leveraging a central AI command center, organizations can move beyond simple automation to orchestrate intelligent agents across their existing systems. This transformation may help organizations realize additional value, with the potential to reduce manual effort and decision latency while enabling unprecedented levels of compliance and risk management. The principles and practical roadmap discussed provide an illustrative roadmap for any leader looking to empower their finance organization, moving it from a historical scorekeeper to a more strategic partner to the business.



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