Transforming Enterprise Performance Management with AI

Webcast Summary

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February 19, 2026

How artificial intelligence is reshaping enterprise performance management for modern finance leaders

Finance organizations are under growing pressure to deliver more value from technology investments, streamline processes, reduce costs, and equip teams with the skills necessary for a rapidly evolving environment. In this webcast, KPMG leaders provided CFOs and finance executives with an in-depth discussion on how artificial intelligence (AI) is reshaping enterprise performance management (EPM), enabling more agile, data-driven, and efficient finance operations. The session highlighted actionable strategies for leveraging AI to help unlock new insights, reduce manual effort, and achieve stronger return on investment from cloud ERP and EPM platforms.

Panelists discussed the following topics

Integration of AI into EPM

AI is helping to enhance forecasting, planning, and budgeting processes. This shift is crucial for creating agile finance functions that can quickly adapt to changing business environments.

Automation through AI

Automating planning and budgeting processes is vital for reducing manual tasks, enabling streamlined operations, and making faster, data-driven decisions. AI supports real-time risk management and resource allocation.

Data Management with AI

Successful AI implementation in EPM begins with robust data management. AI tools can harmonize and clean data, ensuring consistency and reliability across complex datasets.

Strategic Imperative of AI

Adopting AI is a strategic necessity, not just a technological upgrade. It provides potential advantages necessary for growth and innovation, influencing organizational culture, recruitment strategies, and the overall business model.

Understanding AI in EPM

AI is revolutionizing EPM by helping to modernize forecasting, planning, and budgeting, providing organizations with agility in a fast-paced environment. However, many companies struggle with AI adoption, often experimenting before seeing tangible results. The key lies in failing fast and iterating quickly to find effective use cases.

Polling Question 1:

How would you describe your organization's current readiness to adopt AI within EPM or FP&A processes?

- **Results indicated that many organizations are actively adopting AI capabilities, aligning with industry trends showing significant momentum towards AI deployment.**

Readiness to Adopt AI (EPM or FP&A)

Total responses: 1725

27.30%

32.70%

27.30%

12.70%
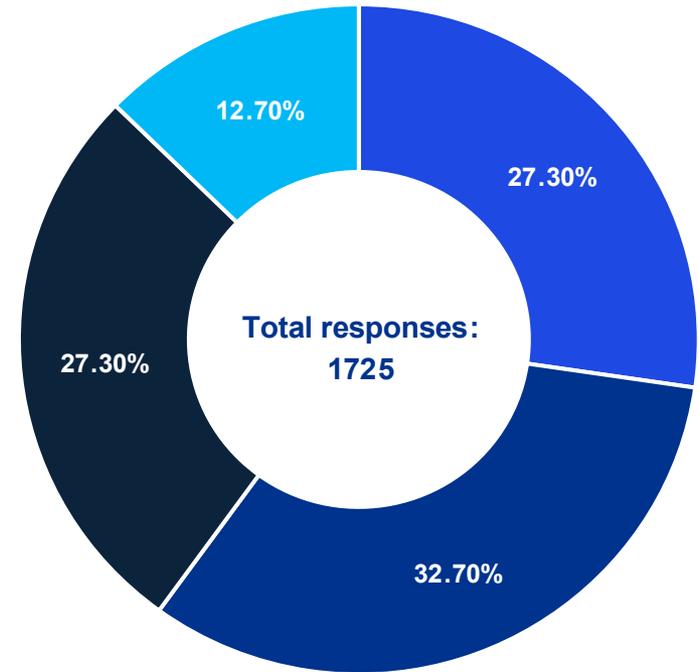
- Exploring use cases
- Adopting AI
- Early awareness
- Not considered

Enhancing Forecasting with AI

Predictive analytics is the gateway to AI adoption in EPM, leveraging algorithms to analyze historical data and inform strategic planning. Modern EPM platforms make these tools accessible without needing deep technical expertise, enabling more users to harness AI for predictive forecasting.

Polling Question 2:

Which area of forecasting do you believe AI would have the greatest impact on in your organization?

- **"Reducing manual forecasting effort" emerged as a primary area where AI could drive significant improvements, reflecting a strong desire to enhance efficiency and accuracy in forecasting practices.**

AI Impact on Forecasting

17.60%

46.00%

Total responses:
1796

22.80%

13.60%
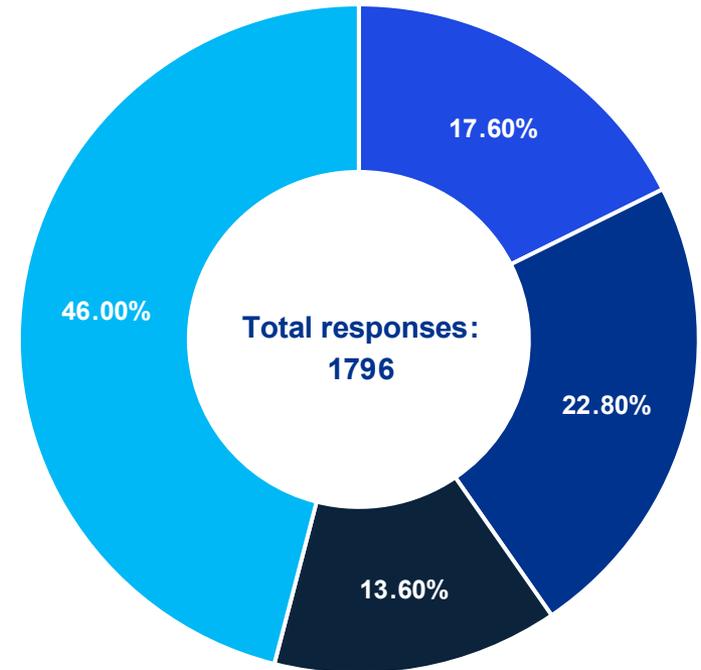
- ■ Improving forecasting accuracy
- ■ Improving scenario planning & sensitivity modeling
- ■ Incorporating more drivers & external data
- ■ Reducing manual forecasting efforts

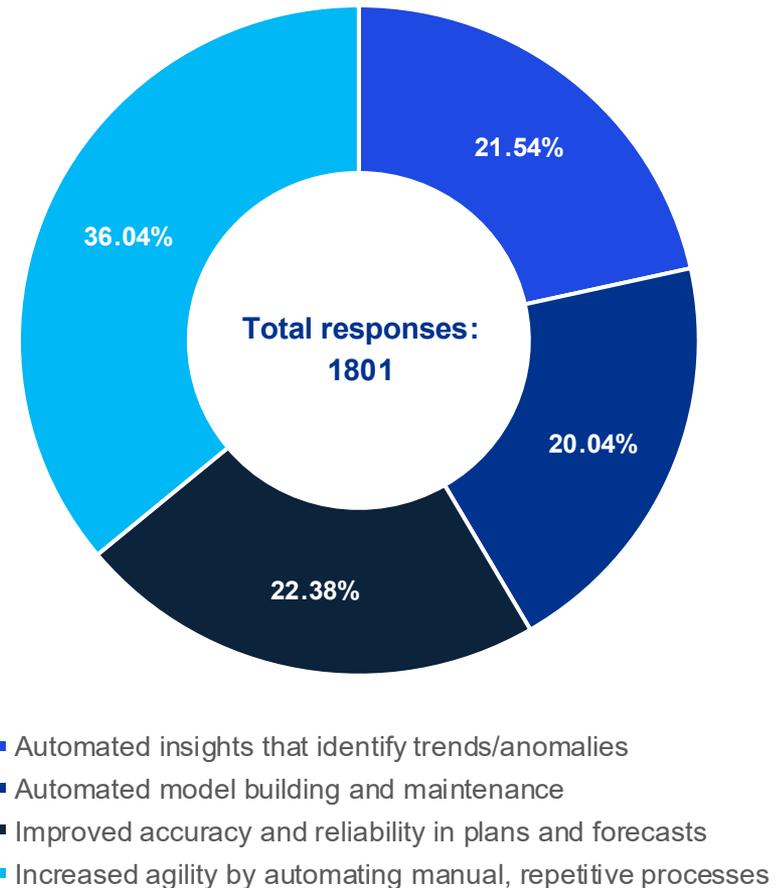# Automating Financial Processes

Automation in planning and budgeting is crucial for reducing manual efforts and improving efficiency. By leveraging AI, organizations can enhance decision-making, optimize resource allocation, and offer potential advantages through smarter inventory and risk management.

Polling Question 3:

Which type of AI-driven support would bring the most value to your planning processes?

- **The predominant response was "Increasing agility by automating manual, repetitive processes," highlighting a focus on streamlining workflows to enable strategic activities.**

Valuable AI-Driven Support

Total responses: 1801

- 21.54%
- 20.04%
- 22.38%
- 36.04%

- ■ Automated insights that identify trends/anomalies
- ■ Automated model building and maintenance
- ■ Improved accuracy and reliability in plans and forecasts
- ■ Increased agility by automating manual, repetitive processes

# Data Management and Strategic AI Integration

Effective data management is foundational for AI in EPM, encompassing data harmonization, quality improvement, and master data management. AI automates these processes, enabling organizations to focus on analytics and strategic decisions. Importantly, AI's integration into reporting and decision-making processes requires strategic alignment with business goals.

Polling Question 4:

Where do you expect AI to create the biggest efficiency gain in your reporting and dashboarding processes?

- **"Improving data consistency by eliminating manual report compilation" was identified as a key area where AI can drive efficiency, enhancing the reporting process and enabling more strategic insights.**

Efficiency Gains in Reporting & Dashboarding

Total responses: 1659

14.77%
18.38%
37.61%
29.23%
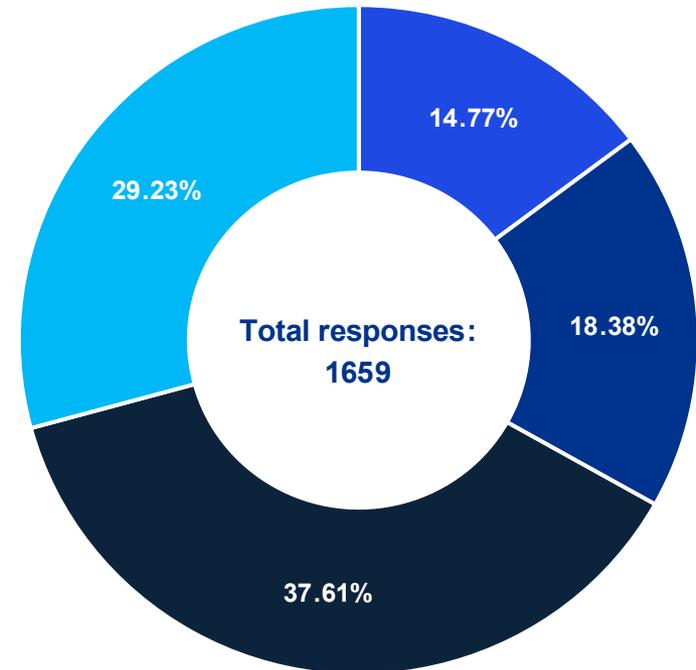
- Automating narrative commentary for financial or operational results
- Helping business users generate insights without needing technical support
- Improving data consistency by eliminating manual report compilation
- Reducing the time required to build recurring dashboards and KPI packs

Conclusion

AI integration into EPM is a strategic imperative, not just a technology upgrade. It demands a holistic approach, encompassing data management, improved process efficiency, and strategic alignment with business objectives. Organizations are encouraged to embrace AI to help modernize their EPM capabilities in today's dynamic business landscape.

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