

2026 Executive Summary

From the Conference Chair

As the demands of your role evolve, embrace the guidance you've gained to implement AI-driven strategies, optimize costs, harness the power of data and analytics, strengthen your approach to growth planning and capital allocation, and communicate financial insights with clarity and impact.

We hope to see you at Gartner Finance Symposium/Xpo™ 2027.

Sincerely
Johanna Robinson
Conference Chair and Practice Vice President, Gartner

Top Takeaways

1

Win the AI race by creating a roadmap

Only 7% of finance organizations have seen a high impact from AI. To ensure success, develop a step-by-step roadmap for achieving your AI goals. Because AI moves quickly, that roadmap should be a living document that is continuously reviewed and refined.

"Your AI roadmap is not just a document – it's the operating plan that turns ambition into measurable impact."

Ash Mehta,
Sr Director Analyst,
Gartner

2

Focus onboarding to deliver immediate wins and enduring value

Create a formal, signed transition plan using Gartner's four-part executive transition framework to increase your onboarding success. Prioritize relationship-building with non-finance executives and rapidly strengthen business acumen, since most of the role operates outside finance. Protect your calendar and allocate time deliberately to maximize personal impact.

"Pay attention to your own personal time and capital, which are your scarcest and most valuable assets; be rigorous and ruthless about how you manage them, and you will thrive."

Dennis Gannon,
VP Analyst,
Gartner

3

Reimagine accounting roles for an AI-enabled function

Take advantage of the dominant areas of AI-driven transformation in accounting by redesigning the department's jobs to be done. Redefine controllership roles as a blend of accounting expertise, advanced digital skills, analytical prowess, and a collaborative human-AI interface. Reposition traditional compliance and transactional accountants into enhanced business partners who deliver forward-looking analysis.

"Prepare for the AI-disruption potential in accounting roles and the opportunity to add technology-first roles."

Hilary Richards,
VP Analyst,
Gartner

4

Cut cognitive noise for more impactful dashboards

CFOs are being asked for faster, clearer insight to guide smarter business decisions, so effective dashboards matter more than ever. Use story, layout, color and simplicity to cut cognitive noise, sharpen decisions and make every dashboard a clear expression of your leadership. Standardize dashboard development so each product tells a consistent story, reduces rework, and scales your influence across the enterprise.

"Dashboards are a powerful reflection of your vision and leadership."

Matthew Mowrey,
Sr Director Analyst,
Gartner

5

Adopt capability diffusion into your vision for FP&A

Reframe FP&A delivery to sustain rising demand: 85% of FP&A organizations say they can't maintain current support levels. Pursue a capability diffusion model—make technology a growing channel for FP&A support and reserve in-person business partnering for the most critical decisions. This approach is three times more effective at creating a sustainable delivery model. Enhance finance's influence through teaching, simplification, and decision tools in addition to consultant-style maneuvering at the decision-making table.

"Capability diffusion offers FP&A leaders a chance to break out of their brute force routine and have the impact they want and need to have."

Tamara Shipley,
VP Analyst,
Gartner

Save the date!



Join us 1 – 2 March 2027 in Sydney, Australia for **Gartner Finance Symposium/Xpo™!**