



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 conference.

Sincerely,

Johanna Robinson
Conference Chair and Practice Vice President, Gartner

5 Key Take-Aways

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.

→ [How AI Front-Runners in Finance Achieve Success](#)



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

Ash Mehta, Senior Director Analyst, Gartner

Focus onboarding to deliver immediate wins and enduring value

Create a formal, signed transition plan using the Gartner four-part executive transition framework to increase your onboarding success. Prioritize relationship building with nonfinance 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.

→ [Learn more about Gartner Executive FastStart™ for CFOs](#)



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, Vice President Analyst, Gartner

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.

→ [Explore 6 themes reshaping how frontier finance teams will use technology in 2030](#)



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

Hilary Richards, Vice President Analyst, Gartner

Cut cognitive noise for more impactful dashboards

CFOs are being asked for faster, clearer insights 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.

→ [Impactful Storytelling: Build CFO Influence With Data & Metrics](#)



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

Matthew Mowrey, Senior Director Analyst, Gartner

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.

→ [Get the 2026 FP&A Leader Agenda](#)



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."

Grant Nelson, Vice President, Team Manager, Gartner



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