# SAVANT

# 10 Principles for Finance Leaders
## Building an AI-Ready Function

How To Keep Finance Moving at Scale

# The Modern Finance Leader's Role

A modern finance organization runs on trust, speed, and audit-ready evidence. The mandate is straightforward: make decisions that hold up under scrutiny, shorten cycle times without loosening control, and keep costs predictable. That requires clear priorities, visible ownership, and tooling that supports the work instead of creating it.

Think of this as an operating plan, not a manifesto. Each priority ties to outcomes that matter to the Board and the business: close cadence, cash, unit economics, risk posture, compliance readiness, and decision quality. Use these guidelines to align your team on definitions, pressure-test processes, and retire activities that don't move a measurable number. Execute in quarters: pick a few priorities, implement them, review on a set rhythm, and compound the gains.

## 1  Set Evidence as the Default



Decision quality rises when evidence becomes routine, rather than irregular. Finance decisions reverberate across the company, and reproducibility protects the quality of those decisions. Standardizing how teams capture sources, transformations, and outputs ensures another reviewer can retrace steps without a meeting. A shared glossary for metrics, materiality thresholds, and treatment rules removes common points of friction, while short method notes make assumptions and limitations explicit.

When evidence is routine, reviews run faster and debates center on interpretation rather than "whose numbers." Variance narratives become clearer, audits move quickly because the trail already exists, and leaders gain confidence that the same question asked next quarter will yield a consistent answer.

## 2  Build Trusted Data Processes Before You Innovate

Treat data like a production input with standards, provenance, and quality requirements. Define what "good" looks like at intake, then design the processes that combine, refine, and reshape those inputs into trusted outputs. Make ownership and operating targets explicit so downstream work isn't guessing, and new ideas don't break on contact.

Link this work to concrete constraints like close cadence, forecast accuracy, cash conversion, and unit economics, and standardize a small set of canonical datasets that serve those needs. Keep an "experimentation lane" for trying new signals and models without touching core outputs, and judge each idea on measurable effect size. The result is continuous, governed innovation with faster time-to-insight and predictable costs.

## 3 Engineer Reliable Data Flows with Auditable AI



Trustworthy outputs are built on dependable pipelines. Start with governed sources feeding a documented, clean layer. Define automated tests for schema changes, required fields, data types, ranges, duplicates, and reconciliations. Fail fast with clear errors when a check doesn't pass. A base like this stays stable under load and keeps downstream work predictable.

Use AI for verifiable jobs: extracting fields from documents, classifying transactions, summarizing narratives, or drafting first-pass variance notes. Keep humans in the loop for thresholds, material items, and final approval. Record prompts, model versions, inputs, and outputs so results are explainable and repeatable. The payoff is faster throughput without giving up control or clarity.

## 4 Create Your Own Knowledge Graph and Private LLM

Build a private knowledge graph that reflects how your finance function actually works — your policies and controls, your entities, their relationships, and the page-anchored evidence behind them. Keep it connected to live systems so lineage and definitions stay current.

Layer a private LLM on top with governed access and retrieval from the graph and other proprietary datasets. Tune it to your cadence, materiality thresholds, and approval flows so agents and people get contextual, consistent answers like where a number came from, what changed, which policy applies, and who approved it. The result is fewer key-person bottlenecks and an asset that compounds in value with every cycle.

## 5 Invest in Technology for Outcomes, Not Features



Feature-led purchases bloat the stack and create hidden operating costs. Anchor every evaluation to one business result with a clear target (accuracy, cadence, unit cost, control health) and scope the trial to prove that outcome. Write a one-pager that names the metric, the integrations the technology must touch, the controls it must satisfy, who will run it, and which existing tools it will replace. Score vendors on time-to-first-value, governance fit, operating burden, and exit flexibility.

Treat the POC as a rehearsal for production. In the trial, exercise SSO/RBAC, audit logs, data residency, maker–checker steps, upgrades, monitoring, rollback, and incident handling, all with real data and real users. Track total run cost (people + compute), not just license. Close with a short decision record: did the target move, are controls green, what gets deprecated, and what the first 90 days of rollout will look like. The result is a lean stack selected for measurable impact you can operate from day one, without surprises later.

## 6 Make Innovation Serve a Metric

Innovation earns budget when it moves a number that matters: close velocity, forecast MAPE, DSO, cash conversion, audit findings, cost per journal, exception rates, and other critical metrics. Start each initiative with a single target metric and an explicit success threshold. Piloting with a narrow scope and production-grade controls makes outcomes comparable across periods and easier to scale. Keep a running "kill list" of pilots that didn't move the metric, so you don't repeat them. This discipline turns experimentation into a credible operating motion.

Treat each initiative like an investment with a clear "win condition." When the metric moves, the business case writes itself, and expansion becomes a straightforward decision. When it doesn't, codify the lesson and stop. The result is a portfolio of efforts that pay back in terms of cycle time, accuracy, and control, rather than a shelf of proofs-of-concept.

## 7 Empower Teams with AI Agents for Efficiency

Build small, mighty teams that deliver outsized impact. Put a compact core of operators and analysts at the center, and pair them with AI agents that handle document intake and field extraction, mapping to the chart of accounts, reconciliations, variance notes, exception routing with context, evidence-pack assembly, and policy checks. Humans stay on thresholds, judgment, and final sign-off, so quality decisions scale with volume.

Make agent-human handoffs explicit and define "done" through tests, not checklists. Track leverage metrics like work completed per FTE, exceptions per thousand transactions, time-to-green on controls, cycle time deltas, etc., so that improvements are visible and defensible. You get steadier execution, faster cycles, and capacity that grows without swelling the team.

## 8 Automate Compliance Controls in Workflows

Compliance should be part of execution, not a separate audit project. Controls that live outside the workflow create parallel processes and evidence gaps. Embedding maker-checker steps, approvals, and immutable logs at the point of action turns compliance into a part of process execution.

Standardized narratives that tie entries to policy with page-level or record-level anchors make review fast and consistent. When evidence is generated as the work happens, audit prep becomes retrieval instead of reconstruction. Cycle times shrink, findings decrease, and confidence rises because audit trails are complete, consistent, and easy to follow.

## ⑨ Identify Risk Early with Leading Indicators



Lagging metrics explain the past; leading indicators signal what's building. Create a short list per domain: aging cohorts before cash tightens, vendor concentration and on-time-delivery drift for supply risk, inventory obsolescence signals, policy exception rates, regulatory watchlists, etc. — this gives the team warning lights rather than rear-view mirrors. Set thresholds and pair each with a predefined response (more on this in the next point).

A brief weekly review that focuses on changes, owners, and next steps shifts energy from post-mortems to prevention. The finance story becomes one of steadier guidance, smaller corrections, and fewer end-of-period surprises, which earns confidence with executives and the Board.

## ⑩ Predetermine Action Plans for Your Top Risks

In a crisis, misalignment costs time and momentum. Pre-deciding levers for your priority risks — spend controls, hedge rules, hiring gates, reserve triggers, supplier substitutions, disclosure steps — eliminates hesitation and inconsistency. Documented thresholds, named owners, and clear sequencing make execution orderly when pressure rises.

Running periodic table-top drills surfaces gaps in data, approvals, and vendor terms while the cost of learning is low. This way, when negative events hit, actions are timely, loss magnitude is contained, and recovery is shorter. Importantly, regulators and auditors see a coherent, repeatable posture rather than ad-hoc improvisation.

# Turn Priorities Into Operating Rhythm

Plans turn into progress when they're visible, owned, and scored the same way every quarter. Put the ten priorities onto calendars with named owners and a simple review rhythm. To track progress, keep a single scorecard of relevant metrics like close cadence, forecast accuracy, cash discipline, exception rates, and audit findings, and stick to it. Use the same definitions every time so trends are obvious and decisions aren't relitigated.

Treat each improvement like a product with a clear outcome, guardrails, and a decision log. When a change moves the number and holds under control checks, scale it. When it doesn't, capture the lesson and sunset it quickly. This keeps attention on results instead of activity and prevents the stack, the process, or the roadmap from drifting.

## REVIEWS SHOULD ANSWER THREE QUESTIONS:

**What Advanced?**
**What Stalled?**
**What Stops Now?**

Over a few cycles, the organization gradually settles into a steady pace where reliability is normal, exceptions are handled calmly, and the board conversation focuses on signal, not theatrics.

# Savant Delivers Finance Transformation

Savant — an agentic analytics platform that automates high-volume finance operations — helps turn these priorities into repeatable practice.

Evidence is recorded as tasks are performed, exceptions are routed with context and ownership, and controls are applied consistently across intake, mapping, reconciliation, and approval.

The outcome is audit-readiness, tighter close cadence, and variance stories that stand on their own. If that's your target state,

[Book a Demo](#) to see in action how Savant can take you there.

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