



# A Roadmap to Finance Digital Transformation in 2025

*How CFOs are rethinking talent, technology, and transformation to meet modern challenges*

## **Redefining the Modern Finance Organization**

As demands on the finance function grow, CFOs are under pressure to deliver faster, smarter, and more strategic results. In 2025, digital transformation is the lever forward, enabling finance teams to improve performance, boost visibility, and lead with data-driven confidence.

### **The urgency is clear:**

- **In 2024, 58% of finance functions adopted artificial intelligence**, up from just 37% the previous year — highlighting the growing urgency for transformation (Gartner)<sup>1</sup>. The trend is expected to accelerate in 2025, with CFOs naming digital enablement a top enterprise priority (Grant Thornton)<sup>2</sup>.
- Despite major investments in modernization, many finance organizations are still falling short of meaningful transformation. **86% of finance teams saw no significant returns from their AI investments** in 2024, with skill shortages, limited execution bandwidth, and unclear value drivers among the top barriers to success (Gartner)<sup>3</sup>.
- Many finance teams lack the in-house expertise, technical capabilities, and scalable strategy to drive lasting impact. Thus, **81% of CFOs are adopting or planning to adopt AI through outsourcing** to access the talent and tools they can't develop internally (Deloitte)<sup>4</sup>.

This report offers a roadmap to finance digital transformation in 2025. Read on to discover the technologies, trends, and strategies you need to know to position your organization for long-term success.



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## Finance Digital Transformation: A Top CFO Priority

Finance leaders are under mounting pressure to deliver more value with fewer resources. At the same time, the nature of finance is changing – with finance teams being called upon to not only report on the past but to look toward the future and steer their business through uncertainty and volatility.

As demands for speed, accuracy, and strategic insight increase, CFOs require a smarter, more agile approach to scale operations and improve performance. The urgency behind finance digital transformation is apparent. In 2025, leading transformation efforts continues to rank among the top priorities for CFOs, states Gartner's 2025 CFO priorities survey.

CFOs are also prioritizing tech modernization in the current economic climate<sup>5</sup>, with new tools for financial operations and data analytics expected to potentially help deal with uncertainty and provide a reliable return on investment, according to Grant Thornton's Q1 2025 CFO tech survey. Automation further helps CFOs confront ongoing finance talent shortages, increasing productivity while decreasing turnover by taking over tedious tasks that impact job satisfaction.

However, finance digital transformation is not just about automating the finance function, it demands a coordinated roadmap, specialized skills, and the ability to execute with more speed, precision, and confidence. And that's where most organizations fall short.



## What is Finance Digital Transformation?

Finance digital transformation is the strategic application of technology to automate and optimize financial processes. By streamlining workflows and reducing the manual effort of routine tasks such as data entry, invoice processing, and reconciliations, finance teams can focus on higher-value activities like analysis, forecasting, and decision-making.

AI-driven automation also can elevate cash forecasting models, catch fraud, reduce errors, standardize workflows, decrease time and expense, and help finance teams do more with less headcount. Nearly two-thirds of CFOs said automating tasks typically performed by employees is a top strategic priority, with 60% implementing automation over the last 12 months<sup>6</sup>, according to a 2024 CFO survey by Duke University and the Federal Reserve Banks of Richmond and Atlanta.

### The benefits of finance transformation are substantial:



#### Efficiency

Automating routine, time-draining tasks like invoice processing and reconciliation cuts down on processing time and reduces headcount requirements.



#### Accuracy

Technologies like AI-powered Intelligent Document Processing (IDP) reduce manual errors and standardize data handling.



#### Data-driven insights

AI-powered analytics unify data from multiple systems and can process massive volumes of financial data in real time, uncovering trends, patterns, and anomalies that traditional tools might miss. The result: a clear, end-to-end view of performance – enabling better forecasting, sharper trend analysis, and more informed decisions, planning, and risk management.



#### Improved service levels

AI and automation enable faster, more reliable responses, payments, and support – strengthening relationships with vendors, customers, and internal stakeholders.



## Cost savings

Digital solutions drive long-term cost reductions through process optimization and error prevention. They also enable finance teams to do more with less, keeping pace with business growth without a similar increase to headcount.

But while the benefits of finance digital transformation are clear, the path to achieving them isn't always straightforward. Many organizations face significant challenges when trying to implement new technologies internally. Common barriers include limited in-house expertise, resource constraints, and the complexity of building a strong business case for investment.

Typically, the finance area is not the priority for strategic automation initiatives by capacity-constrained IT organizations, who are hunting “bigger fish” in terms of headcount reductions and ROI.

Even large enterprises often struggle to prioritize automation amid competing business demands. As a result, finance transformation initiatives are frequently delayed, underutilized, or abandoned, leaving finance teams reliant on inefficient, manual processes that limit efficiency.

A tech-enabled finance and accounting outsourcing partner accelerates digital transformation by combining operational expertise with instant access to cutting-edge technology – as well as skilled digital finance talent that is often expensive or hard to find at home.



**81%** of finance leaders are adopting or planning to adopt AI as part of their outsourced services, looking to quality providers to offer instant access to the talent and tools they need to achieve sustainable success, states Deloitte's 2024 Global Outsourcing Survey.<sup>7</sup>

## Key Technologies Driving Modern Finance Transformation

The modern finance function runs on more than spreadsheets and siloed systems. Proactively building the right team with the right skill sets and investing in smart technology is essential to navigating future disruption, unlocking breakthrough performance and strategic insights that keep your business ahead.

Maximizing automation capabilities in your enterprise resource planning (ERP) system is important, and robotic process automation (RPA) is table stakes. But forward-thinking CFOs are focused on creating a clear vision and strategy for finance in the digital world that leverages the emerging AI and automation technologies reshaping how modern finance teams operate.

**Here are the key tech opportunities to consider to elevate and modernize your finance operations:**

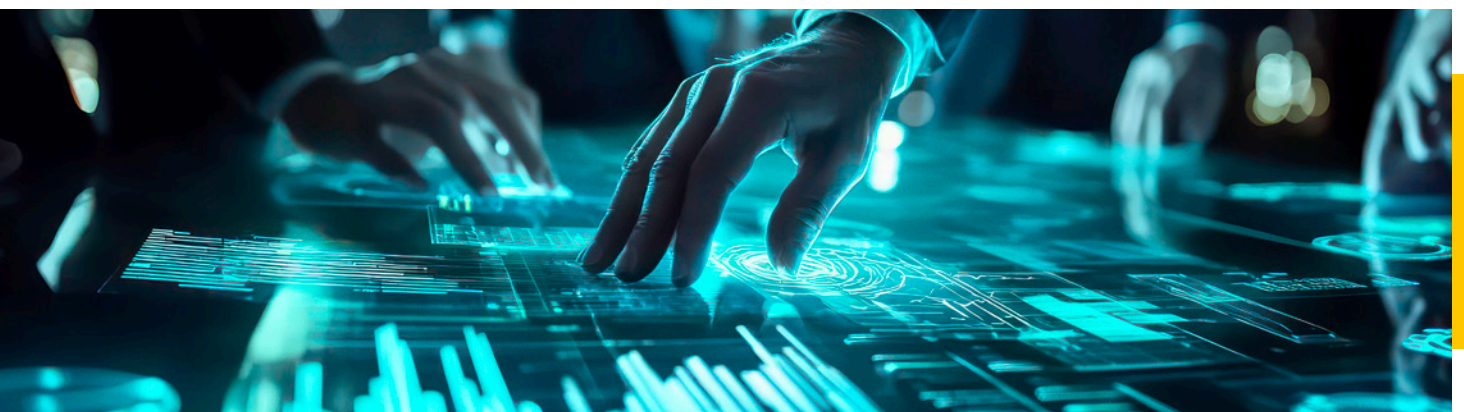
### Agentic AI

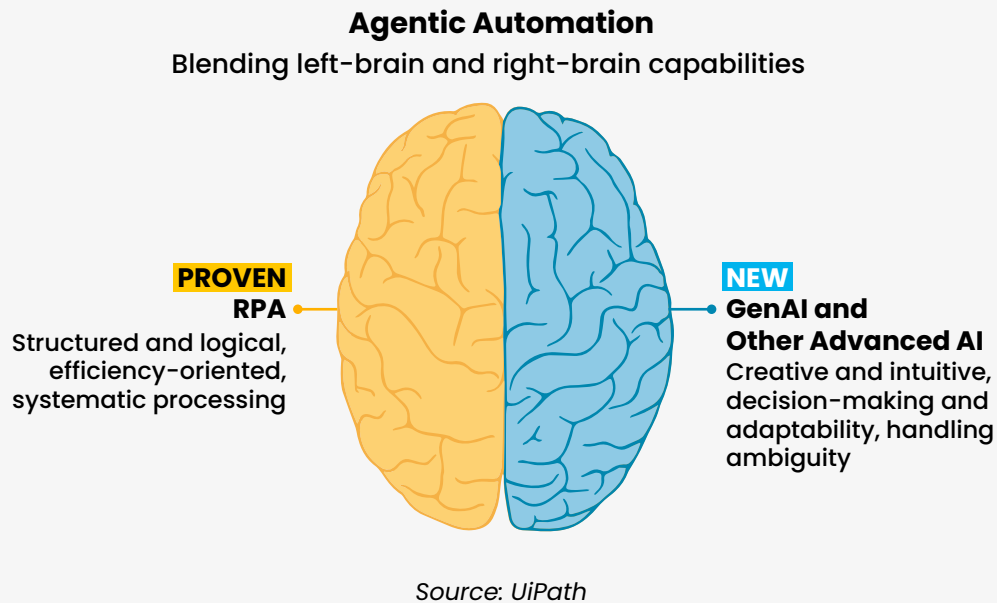
Heralded as the “Act Two” of automation, agentic automation introduces intelligent software robots, or agents, that can autonomously manage tasks, tools, and decision-making steps to achieve a defined goal without constant human intervention.

Unlike traditional bots that follow rigid rules, these agents, powered by Agentic AI, can perform judgment-based tasks once reserved for humans. Agentic also solves key limitations of Generative AI (GenAI), which responds to a

single prompt at a time and doesn’t autonomously take initiative or execute multi-step workflows.

In an agentic automation workflow, robots, GenAI models, and agents are deployed together: RPA for automating rules-based tasks, GenAI for creating smart content, and AI agents to act as a virtual project manager that can complete complex business processes previously beyond the reach of automation.





For finance organizations, the transformative possibilities are endless, delivering faster execution, accuracy, and strategic value.

Some **90%** of executives believe their business processes could be improved by agentic automation, states the UiPath 2025 Agentic AI report.

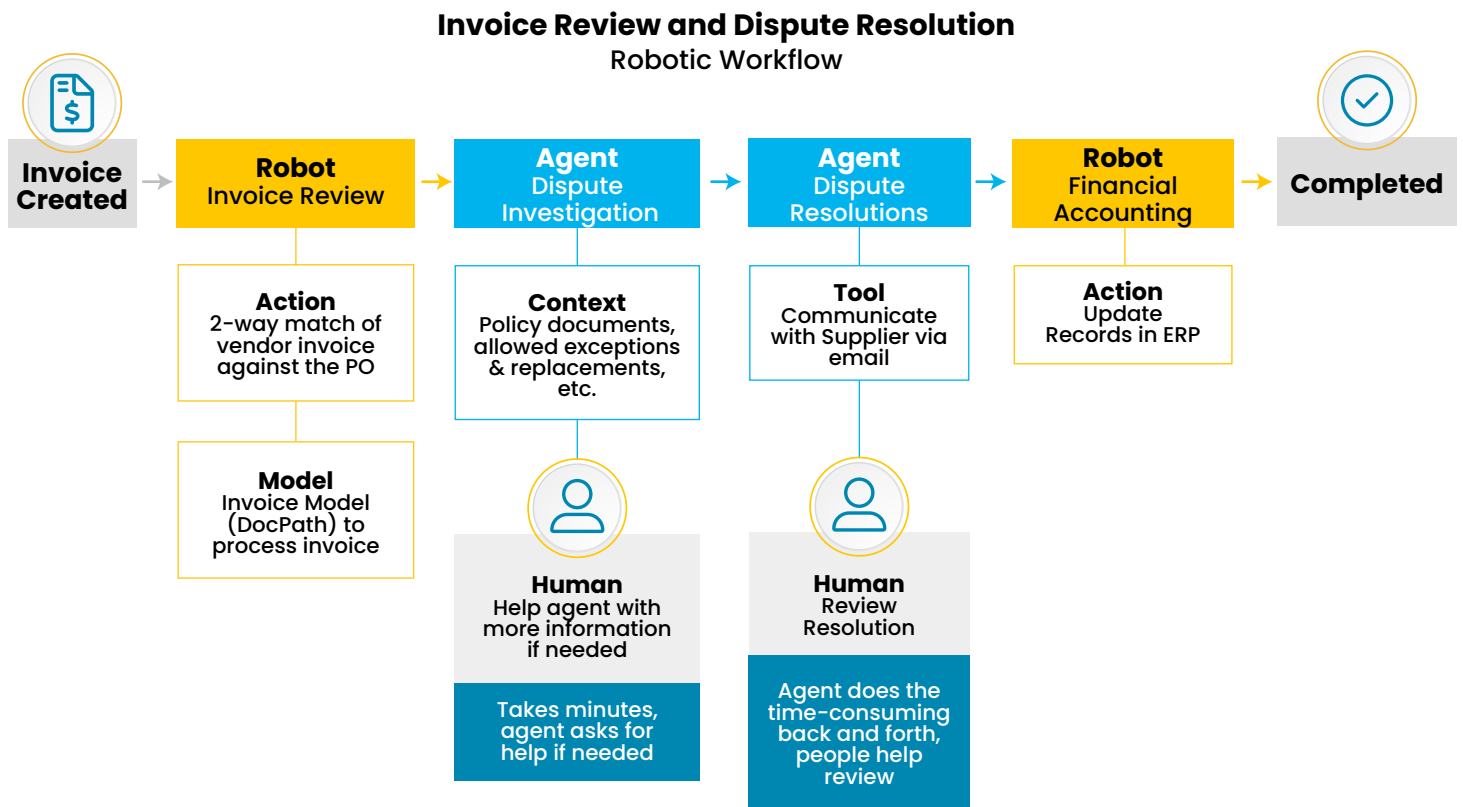
That's the theory, anyway. But finance organizations are struggling to implement use cases that deliver results.

### Here's how Agentic AI can transform operations for value-seeking finance executives:

- Agentic AI can independently gather data, identify trends, run scenario modeling, and deliver real-time financial forecasts — adapting dynamically to market conditions or internal business shifts. It can monitor budget performance across departments, flag anomalies, recommend reallocations, and even execute approved changes based on pre-set goals and thresholds.
- Agents can orchestrate and automate the month-end close process — solving critical pain points by chasing approvals, reconciling accounts, and preparing reports — reducing human intervention and minimizing errors. With fraud a key concern for finance teams, they can also validate vendor legitimacy by instantly cross-referencing W-9s, internal records, and public databases.

Agentic AI can “tee up” the data needed by the accounting team to not just manage the close but to guide how they interpret the information and deliver more strategic insights to the business. The result: Speed, productivity and insights, and higher-value work from your accounting team.

This UiPath chart details how an agentic workflow in accounts payable could function:



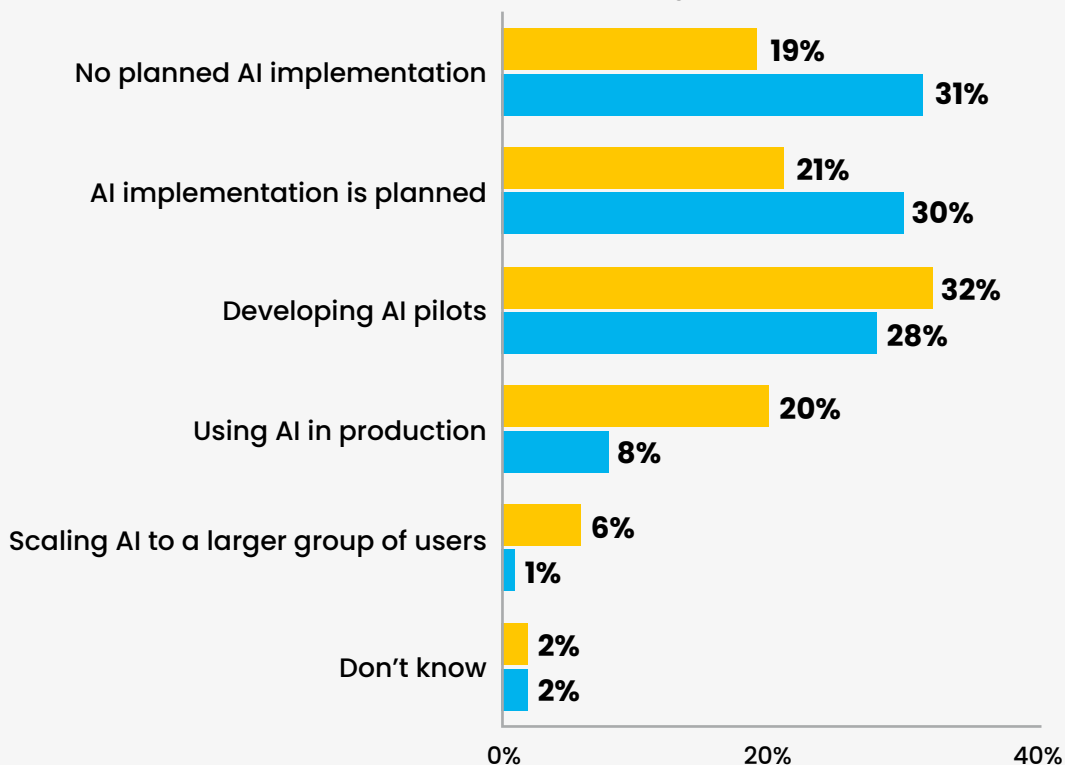
## Generative AI (GenAI)

Generative AI (GenAI) is helping finance organizations become more strategic, efficient, and data-driven. Previously considered a laggard in AI adoption, finance is catching up with other functions such as HR, legal, and procurement as teams look to forecast trends, improve risk management, optimize operations, and automate end-to-end processes.

However, while interest around AI technology is high, Gartner reports that usage remains in early stages, with most centered around developing pilots and another 21% still in planning. These numbers will no doubt rise in 2025 as companies continue to grow more comfortable with the technology.

### Current Levels of AI Use in Finance, 2023 vs 2024

Percentage of Respondents



**58%** of finance organizations are using AI in 2024

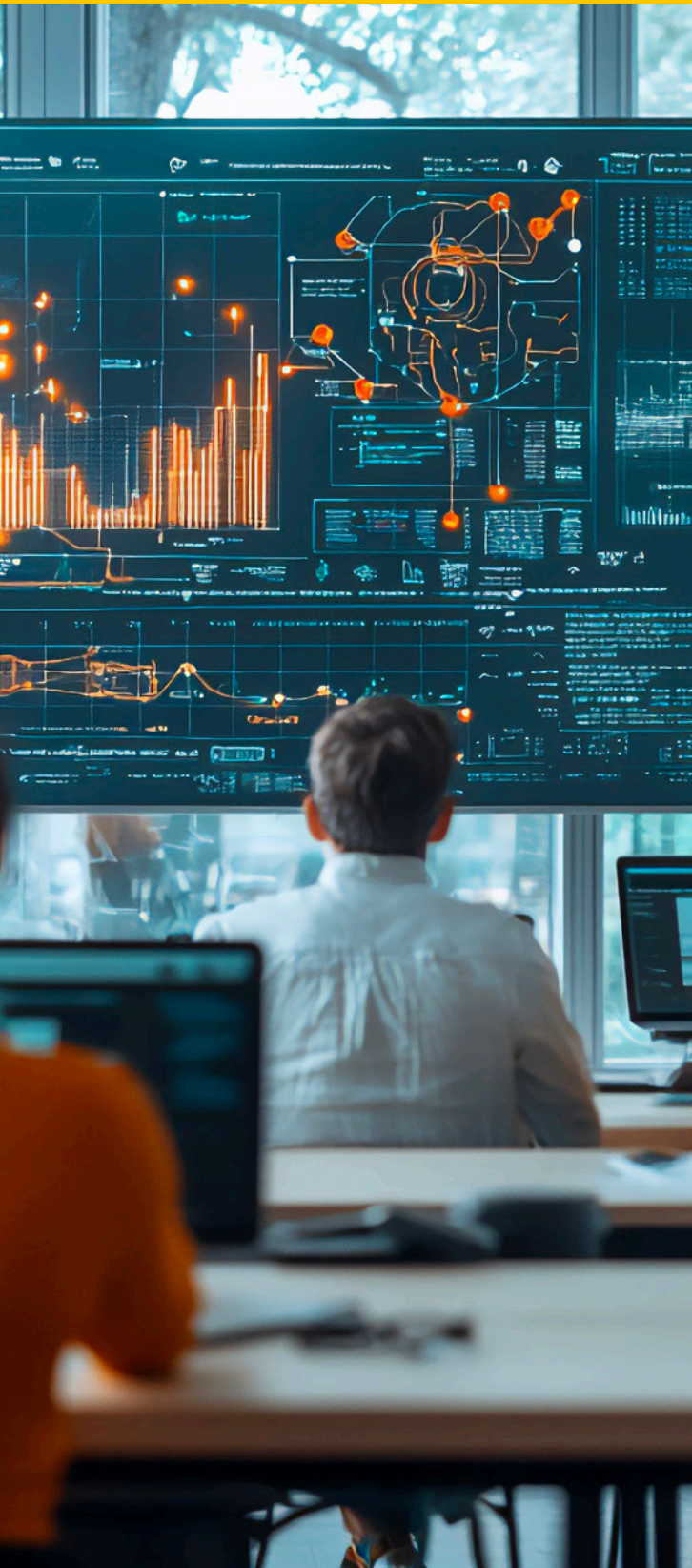
Source: Gartner 2024 research

GenAI introduces natural language capabilities into finance, allowing users to ask complex questions in plain English like “show me last quarter’s expenses by department” and receive context-aware, data-driven responses. It can also streamline tasks like document review, inquiry handling, and reporting. Case in point: Generative AI can automatically generate clear, well-structured financial reports, commentary, and executive summaries — saving time and improving clarity for stakeholders.

But it is the partnership of AI and robotic process automation (RPA) that creates a foundational tool in the modern finance transformation toolkit — amplifying automation with intelligent capabilities that can action complex, end-to-end workflows. GenAI acts as the “brain” — analyzing information and formulating an intelligent response to vendor inquiries, for example — while RPA is the “muscle,” gathering relevant current and historical data to create the context GenAI needs to create the most accurate content and then delivering the response.

Leveraging a world-class automation platform like UiPath, the world’s leader in AI and automation, is critical to seamless deployment — providing connectors to all the leading GenAI models so you can leverage the most effective solution for each use case without getting locked into a single model.





One of GenAI's most immediate finance applications is in vendor and customer communication. AI-powered automation can respond to routine inquiries by accessing real-time data from ERP systems while escalating more complex issues to human specialists — streamlining service and boosting responsiveness.



*More than **70%** of CFOs said customer experience is a major consideration in their digital transformation decision.*

The number deploying GenAI to improve customer relationship management and the customer experience rose 19 percentage points over the past 15 months to 64%, according to Grant Thornton's survey.

GenAI also supports fraud detection in areas like Travel and Expense (T&E) reporting by identifying anomalies in spending patterns faster and more accurately than rules-based systems. In Order-to-Cash, it can enhance forecasting, tailor collection strategies, and improve visibility into cash flow.

GenAI provides the “missing link” to the RPA challenge of needing humans in the loop to manage a process from end to end. The humans will still be needed, but they will be more like that human evolution picture, with your finance team of “*Homo sapiens*” standing upright to handle the most complex and highest-value activities.

## Intelligent Document Processing (IDP)

Extracting strategic information from high volumes of documents like spreadsheets and invoices is a significant pain point for finance teams, characterized by manual, time-consuming, error-prone work. That is particularly true in AP, where invoice management ranks as the #1 automation priority as 52% of AP teams still spend 10+ hours per week processing invoices, IFOL's 2024 Accounts Payable Automation Trends report found.<sup>8</sup>

With technology that solves a universal pain point and is easy to understand, Intelligent Document Processing (IDP) is a common entry point into next-gen capabilities for finance organizations – providing clarity around the business case.

Traditional optical character recognition (OCR) systems often fall short when faced with diverse document layouts and complex data structures, limiting their effectiveness in dynamic financial environments. To gain the highest level of effectiveness, you must “teach” the technology the nuances of each vendor’s invoice document. This is a time-consuming and costly effort and still has limited results as new vendors are always coming online and document changes disrupt the process.

Next-gen IDP models like UiPath’s Document Understanding transcend these limitations by harnessing AI, machine learning (ML), and natural language processing (NLP) to accurately extract, interpret, and process data from documents of any format or complexity – from structured files like spreadsheets to unstructured documents like scans of receipts and handwritten forms.



## 7 Intelligent Document Processing Use Cases for F&A



In accounts payable, AI-powered IDP can enable high levels of "touchless" invoice processing – accurately processing complex documents, understanding context for data the automation needs to extract to improve results, and greatly shortening model training times for rapid deployment.

The result: reduced manual intervention, faster approval cycles, fewer errors, and improved vendor relationships. [Read this case study](#) to learn how Auxis' IDP solution is enabling 95% touchless invoice processing in a leading retailer's high-volume AP department.

Many organizations think they are getting the same level of benefit from "off-the-shelf" solutions, but the reality is that true "touchless" processing requires another level of technology that only the combination of customized AI, machine learning, and natural language processing can provide.

Other key IDP use cases include automating invoice creation and delivery from order documentation in AR, extracting and standardizing data from multiple bank statement formats, extracting data from income statements and balance sheets to support financial statement analysis, compiling data for regulatory submissions, and more.

## Communications Mining

Finance teams manage hundreds of unstructured communications weekly, from vendor emails and customer inquiries to internal follow-ups. Communications Mining leverages AI and NLP to convert this unstructured text into structured, actionable data — helping organizations not only understand what people are saying, but how frequently they are saying it and in what context.

### Communications Mining in Action

#### Interpret the message...

**Subject:** Address change policy No. 1863325  
**Created:** June 29, 8:33pm  
**From:** Ed Crossey  
**To:** Aaron Challis

Hi Aaron,

Further to our emails on 17th May and 6th June, could you please update the address on the above policy to 20 W 34th St, New York, NY 10001, USA.

My policy is due to renew next week, and I need the address updated before signing the PO.

Feel this is unnecessarily hard.

#### Extract key insights

##### Requests

Policy > Renewal

Policy No: 1863325

Admin Change > Change of Address

Address Line: 20 W 34th St, New York, NY

Zip code: 10001

##### Quality of Service

Chaser

##### Sentiment

Frustrated

*UiPath's The Ultimate Guide to Communications Mining*

Instead of manually reviewing each message, the technology can identify intent, categorize requests, extract key insights, and trigger automation to perform next steps. This allows finance teams to quickly analyze emails, tickets, and chat messages to uncover patterns, flag bottlenecks, and detect missed service-level agreements (SLAs).

The result: faster response times, improved productivity, and more consistent service.

For example, Communications Mining can automate high-volume, repetitive interactions – leveraging RPA or agentic agents to respond automatically to common requests like invoice status inquiries or route tasks to the right team member. It can also highlight trends that might have otherwise slipped through the cracks; for example, identifying repeat issues in invoice approvals or uncovering reasons for common disputes that delay payments.

Beyond efficiency, Communications Mining strengthens customer and vendor relationships. By surfacing insights from communication channels, finance leaders gain visibility into emerging issues and can make data-driven decisions that reduce costs and elevate performance. For example, spotlighting customer communications trends like late payments enables proactive outreach.



## Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is a core pillar of finance transformation. While it may no longer be the “shiny new object,” RPA continues to deliver significant value by automating high-volume, rules-based tasks with speed, accuracy, and consistency.

More than 60% of operational finance tasks are repetitive – making them ripe for RPA, states UiPath’s 2024 CFO Strategy report.<sup>9</sup> Bots streamline tedious tasks like journal entries, form population, approvals, and system integrations, reducing manual effort and allowing finance teams to focus on higher-value work.

### Five Ways to Use Robotic Process Automation in Finance and Accounting



Improve Data Entry



Speed Up Invoice Processing



Boost Compliance



Accelerate Report Generation



Enhance Customer Service



Flag Potential Fraud

Operating on structured data and predefined logic, RPA doesn’t learn or adapt like AI. But when integrated with technologies like Intelligent Document Processing and GenAI, it becomes a key enabler of end-to-end automation.



Take invoice processing, for example: RPA retrieves the necessary documents, IDP extracts and categorizes the data, and RPA routes the invoice for approval and posts it to the system. In this workflow, AI provides the intelligence, while RPA delivers the execution.

More than half of finance teams are using automation to reduce inefficiencies and costs caused by manual processes.<sup>10</sup> Other critical benefits finance teams are reaping from RPA include access to data and insights for better decision-making, meeting stakeholder demands, supporting business growth, and promoting work/life balance for finance staff, the report found.

## Why Internal Teams Struggle to Deliver Finance Transformation

Despite rising pressure to modernize finance, many organizations struggle to turn digital transformation into tangible results — 86% of finance teams saw no significant value from their AI investments in 2024, according to Gartner. The root causes are consistent: unclear starting points, poor data quality, talent shortage, and complex budgeting processes.

Some 85% of enterprises are unprepared to manage the risks needed to realize the full benefits of digital transformation, states Everest Group's 2025 priorities mapping report.<sup>11</sup>

*CFOs echo that sentiment, with **77%** reporting a lack of technical skills within finance as a critical reason their function has not yet adopted AI, Gartner adds.*

As Eduardo Diquez, Auxis' Intelligent Automation Practice Lead, explains: "These initiatives are frequently delayed by complex budgeting cycles, unclear ownership, and low ROI confidence. That's why more companies are turning to outsourcing as a transformation enabler."

A tech-enabled partner provides the talent, tools, and structure needed to deliver transformation at scale without the overhead of building those capabilities in-house. This shift reflects a broader evolution in how finance leaders view outsourcing. Beyond labor savings, outsourcing to a quality provider delivers proven strategies, greater visibility, and measurable performance improvements.

That's the Auxis nearshoring model. By pairing experienced finance professionals with award-winning automation and AI capabilities, Auxis helps clients unlock both immediate and long-term value, achieving an average 30-50% labor arbitrage and an additional average 10-20% savings through productivity and efficiency gains, all while increasing scalability and accuracy.

And the results can be guaranteed. That 86% "lack of value" statistic can become 100% value realized.

## How Nearshoring Solves F&A Talent and Tech Gaps

Finance digital transformation is no longer a question of if, but how. As CFOs navigate rising complexity, talent shortages, and increasing demands to deliver strategic value, the path forward hinges on execution.

While emerging technologies like Agentic AI, GenAI, and Intelligent Document Processing offer immense potential, they are only part of the equation. The real differentiator is the ability to align strategy, technology, and talent to deliver measurable business outcomes.

To close that gap, finance leaders are turning to tech-enabled outsourcing partners who bring the digital expertise, operational knowledge, and execution power needed to accelerate transformation at scale. Nearshore delivery further enhances this approach, addressing the time zone, cultural, and collaboration challenges that have long hindered traditional outsourcing models. With access to highly skilled finance professionals, real-time support, and advanced automation platforms, nearshoring enables faster innovation, stronger control, and better business alignment.

In 2025 and beyond, successful finance transformation won't be defined by tools alone. It requires the right strategy, technology, and partner to turn transformation into lasting value.

Whether you're launching digital transformation or scaling existing efforts, Auxis provides the roadmap and execution to lead with confidence.

*Ready to modernize your finance function? [Schedule a consultation](#) with our experts today. Or, [visit our resource center](#) for more finance transformation tips, strategies, and success stories.*



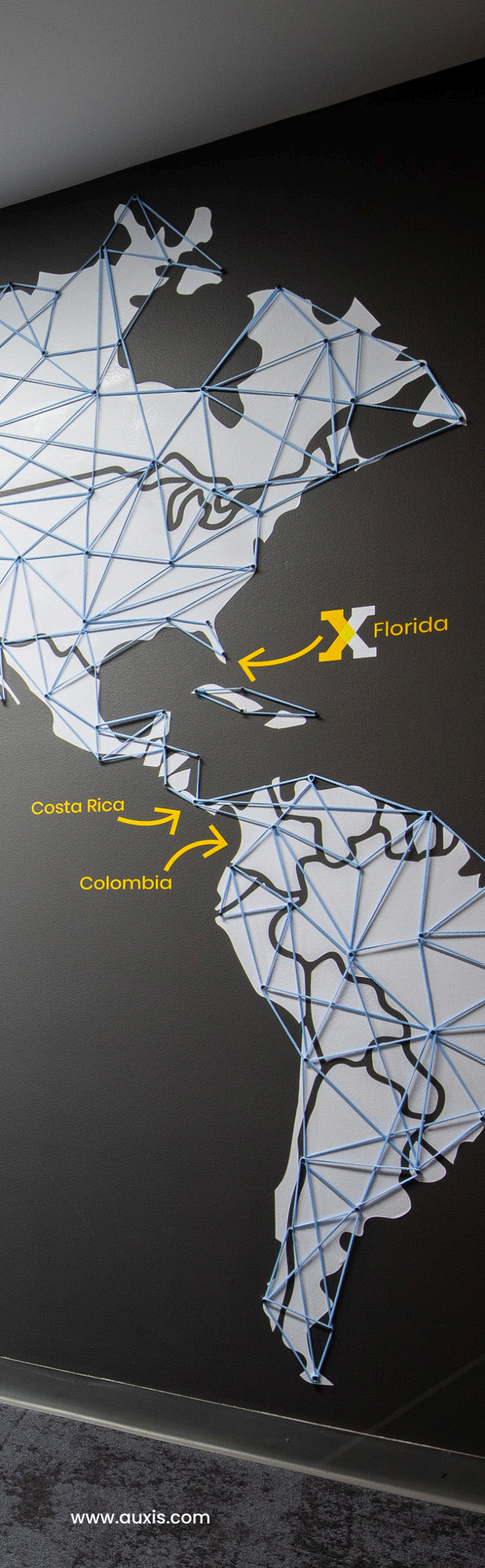
## About Auxis

Auxis is a leading management consulting firm and Latin America outsourcing pioneer that helps clients modernize and scale their business operations through innovative processes, technologies, and organizational structures.

Trusted by large enterprise and mid-market organizations across industries, Auxis combines nearly three decades of finance transformation experience with a unique perspective as shared services operators, industry veterans, and trusted advisors. Clients obtain real benefits and ROI from every engagement with solutions that consistently deliver rapid paybacks, significant cost savings, access to top finance talent, improved controls, enhanced operational visibility, and greater organizational focus on higher value-creating activities.

Auxis is recognized as a top finance and accounting outsourcing company by leading research analysts: named a **Major Contender** and Star Performer on Everest Group's Finance and Accounting (FAO) Peak Matrix® Assessment 2024 and a **Contender** in the ISG Provider Lens™ for Finance and Accounting Outsourcing (FAO) Services 2024. Auxis was also honored as **UiPath's 2024 Foundational Americas Partner of the Year**, highlighting its leadership in AI and automation-driven transformation that drives cost savings, improves service delivery, and unlocks greater strategic value.

Core services include Finance, IT, and BOS Nearshore Outsourcing; Intelligent Automation; Cloud; and Business Intelligence. Auxis also offers specialized industry-specific solutions. To learn more, visit [www.auxis.com](http://www.auxis.com).



## External Source Footnotes

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