

# How AI Enhances Finance's Value to the Business: **Our Story**

From Pilot to Embedded Intelligence in FP&A



**Kevin Washek**  
FP&A Director  
at Kimball Midwest

- Planful buyer and implemented the tool in a Finance role
- 16+ years of experience in finance leadership & FP&A
- Leads FP&A transformation initiatives
- Embedding AI inside core FP&A workflows
- Otterbein University - BS Business Admin & Finance



**Matt Sledge**  
Sr. Manager, Product  
Marketing at Planful

- +18 years of FP&A experience
- 2 x Planful buyer and implemented the tool in a Finance role (2013 & 2017)
- Recovering Finance / FP&A person
- Consulting Experience using other EPM tools
- BS Accounting, University of Alabama at Birmingham, 2008
- MBA Finance, University of Alabama at Birmingham, 2010



01 Where your team will hit its capacity ceiling

02 Why AI adoption  $\neq$  operational integration

03 What must shift for AI to truly be operational

04 Turning AI into a real capacity multiplier

05 Practical lessons & live Q&A



# KIMBALL MIDWEST

We help businesses across industries reduce downtime, enhance efficiency, and maximize productivity with high-quality maintenance, repair, and operations (MRO) supplies.

## What We Offer:

- Extensive product selection with fast, reliable delivery
- Personalized service tailored to business needs
- Inventory management solutions to streamline operations

With over 100 years in business, our commitment to customer success drives us to deliver top-tier MRO solutions and expert support to companies nationwide.

## At a Glance

---

**Customers Nationwide**  
50,000+

**Headquarters**  
4800 Roberts Road  
Columbus, OH 43228

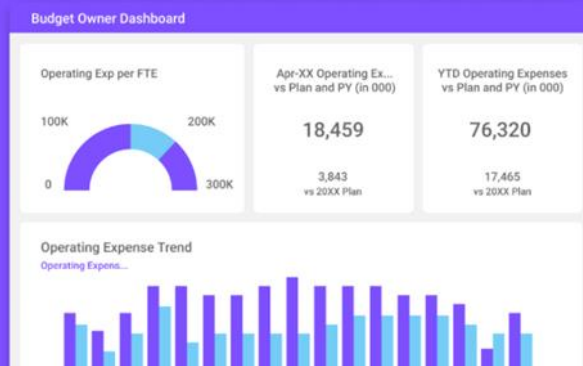
**Employees**  
1,800+

**Years in Business**  
100+



The Planful platform, which helps businesses drive peak financial performance, is used around the globe to streamline business-wide planning, budgeting, consolidations, reporting, and analytics.

- Planful for **Finance**
- Planful for **Accounting**
- Planful for **Marketing**
- Planful for **Human Resources**
- Planful for **Sales, IT, Ops**



## 1,700+ Customers

90+ countries from all industries

## 500+ Employees

Across the U.S., Canada, UK, India, and Australia

## 20+ Years of Expertise

Providing unparalleled innovation since 2001

## 4 Offices

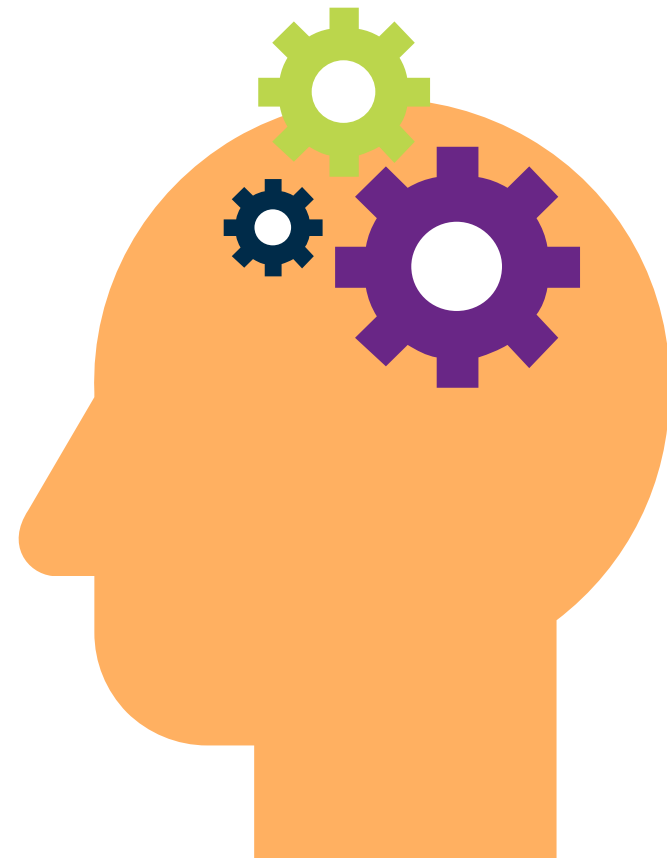
San Francisco, U.S., Toronto, Canada, Hyderabad, India, London, UK

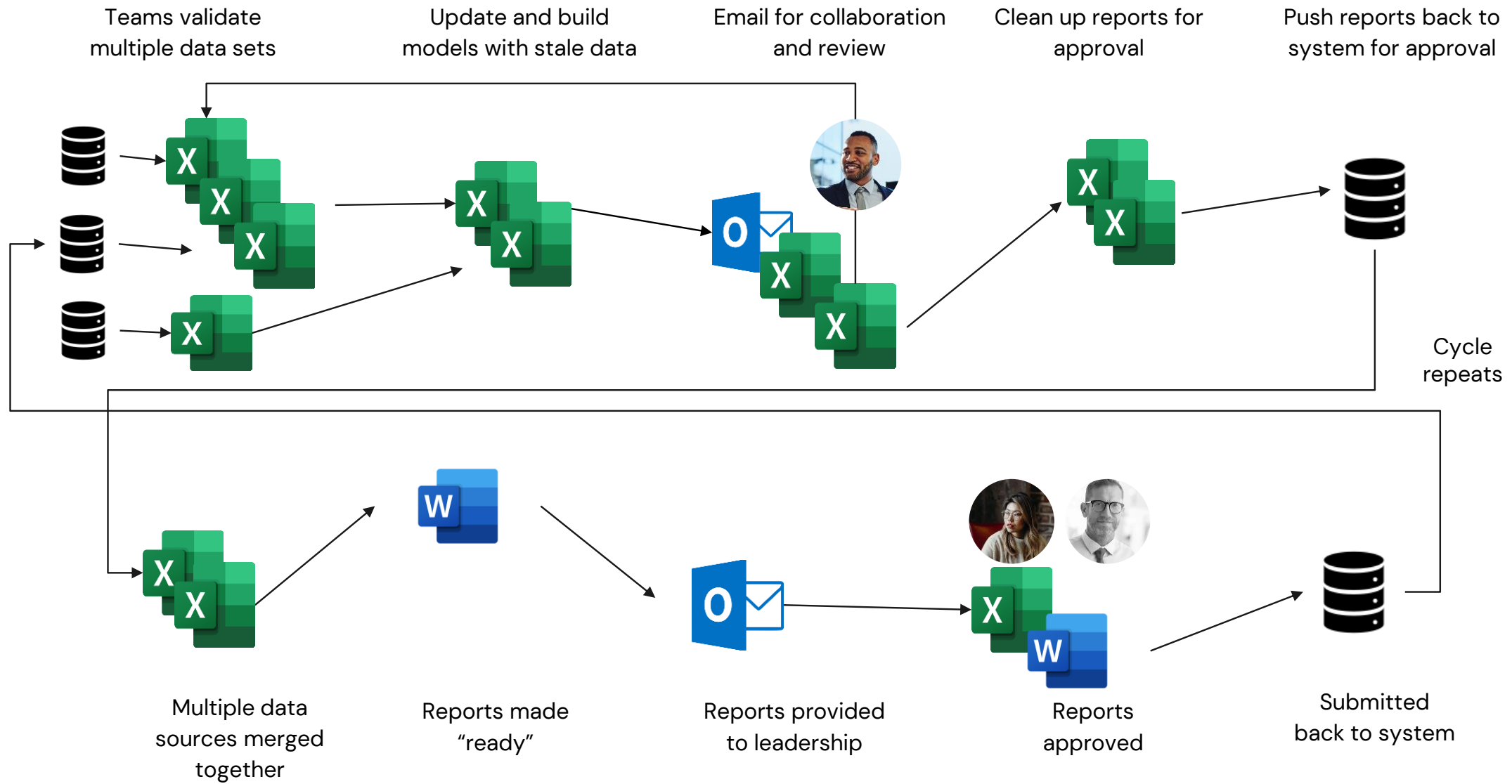


# The Reality of AI in Finance

Adoption  $\neq$   
Integration

Using AI tools is not the  
same as operating with AI.





# Adoption Is Rising... Integration Is Lagging.



of teams say they're  
using AI every day.

But most teams haven't embedded AI  
into how FP&A actually runs.

# What Integration Actually Requires

Integration means AI becomes part of the operating rhythm.

## Where AI lives

- Embed AI inside existing workflows
- Build AI into the review cadence

## How AI is trusted

- Design human-in-the-loop checkpoints
- Shift how analysts start their work

# A Repeatable Pattern for Operational AI

1. Experiment deliberately
1. Hit the capacity ceiling
1. Embed AI into the review cycle
1. Expand capacity without expanding headcount

Integration means AI becomes part of the operating rhythm.

# Kimball Midwest's AI Journey

**Act II:**  
From Experimentation to  
Embedded AI



# Last Year: Early AI Adoption

## What We Put in Place (Crawl Phase)

- Predictive budget seeding
- Automated anomaly detection
- AI-assisted validation before reporting

## The Realization

- AI used in isolated workflows
- Outputs validated side-by-side
- Confidence building — not reliance
- AI informed the workflow — it didn't change it

# Realities from Pilot to Production

## Capacity was the Structural Breaking Point

- Ad hoc requests outpaced team capacity
- Scenario modeling expected in hours
- Heavy manual review each cycle
- Headcount flat, demand rising

## What That Meant Operationally

- AI could absorb repeatable workload
- AI needed to run inside the workflow
- The shift wasn't "try AI"
- It was "operate with AI"

# The Assistant Era

## What the Assistants Enabled

- Natural-language financial queries
- Executive-ready AI summaries
- Embedded AI guidance inside Planful

## Operational Shift

- AI became part of the standard review cycle
- Analysts moved from scanning to interpreting
- AI outputs were trusted and relied upon

# What Operational AI Actually Changed

## Before AI Was Embedded

- Manual variance scanning
- Commentary written from scratch
- Scenario modeling time-intensive
- Reactive decision cycles

## After AI Became Standard

- Material variances surfaced automatically
- Commentary drafted in context
- Modeling became conversational
- The same team supports more — with less friction

# Future-Proofing FP&A

## Ongoing Structural Pressures

- Talent constraints
- Rising analytical demand
- Faster decision expectations
- Volatility requiring constant iteration

## AI as a Capacity Multiplier

- Analysts increasingly start with AI – not spreadsheets
- Insight arrives earlier in the cycle
- Planning becomes iterative
- Finance becomes more strategic

# The Shift Isn't AI — *It's the Operating Model*

“We tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run.”

— Roy Amara  
Founding President, Institute for the Future



**Kevin Washek**  
FP&A Director  
at Kimball Midwest



**Matt Sledge**  
Sr. Manager, Product  
Marketing at Planful

**Visit us at Booth #116!**