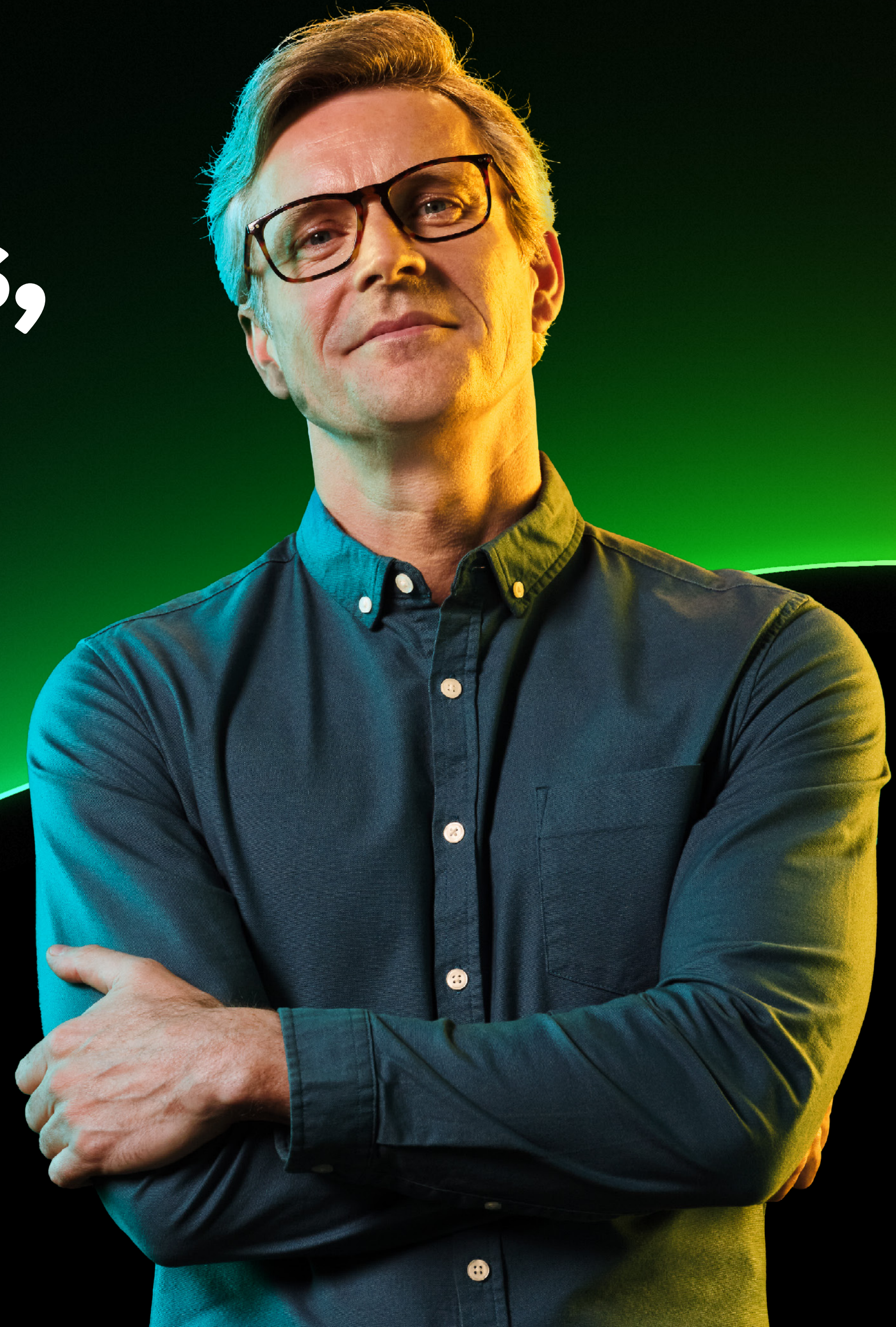


E-book

The evolution of AI in Finance: Progress, promise, and a practical solution

How using embedded, finance-trained AI and automation
can reduce time spent on the month-end close by up to 90%.



ACUITY 24

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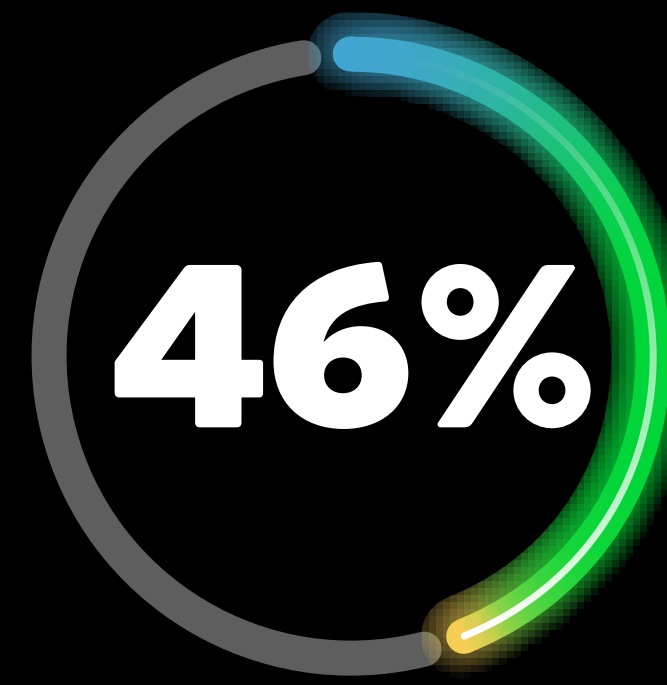
Unlocking high-performance finance with accounting-trained tools

It may have started as hype, but generalist AI is now standard equipment for finance teams.

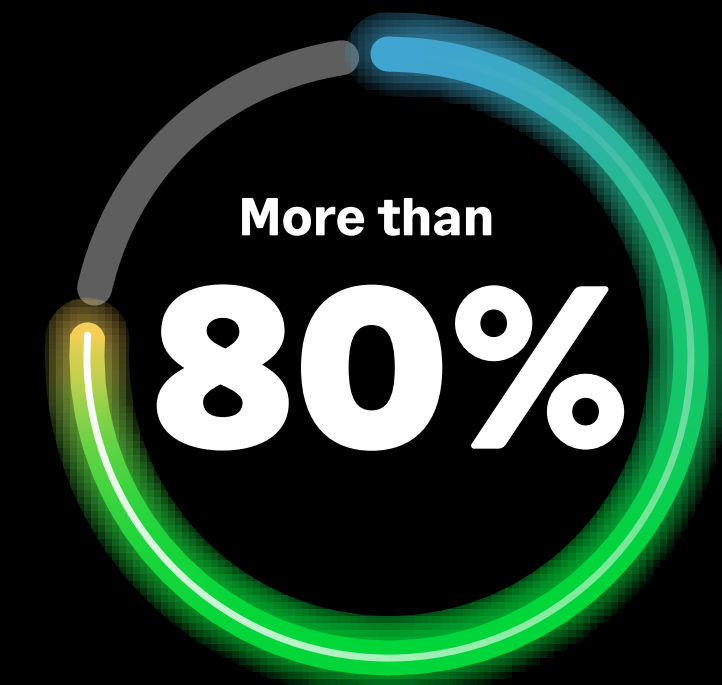
Adoption is no longer early-stage. 46% of finance teams have used AI tools for over a year¹, and more than 80% of CFOs expect to increase their use of automation, analytics, and AI in the next three years².

Finance leaders are using more AI, but results haven't caught up to expectations. Month-end close is a textbook example of this. Nearly 90%³ of CFOs say they use AI to support the close, yet only 26%⁴ say it actually saves them time.

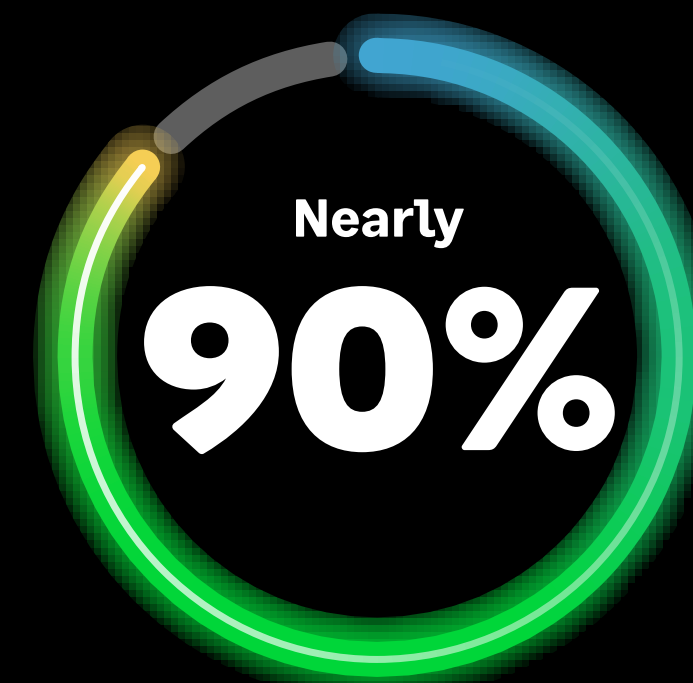
That gap signals a deeper issue: most AI tools aren't built for finance and don't deliver on the metrics that matter.



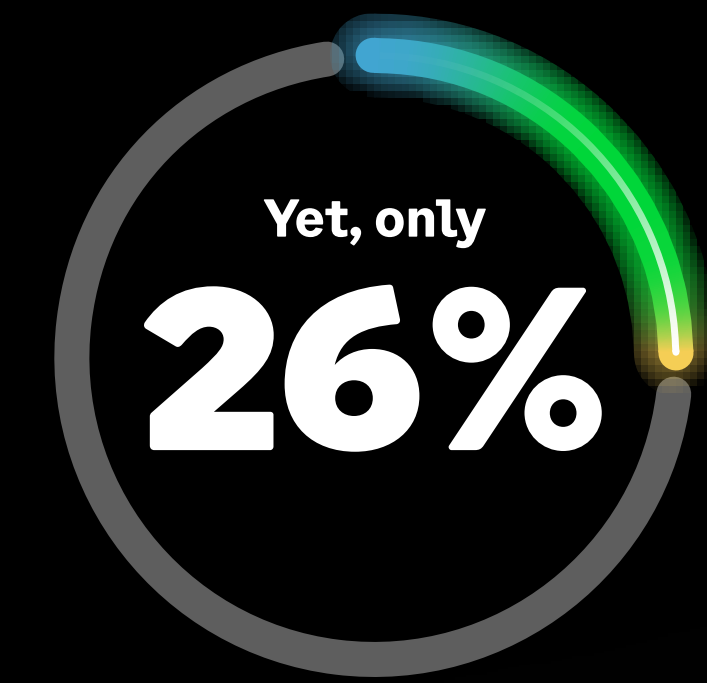
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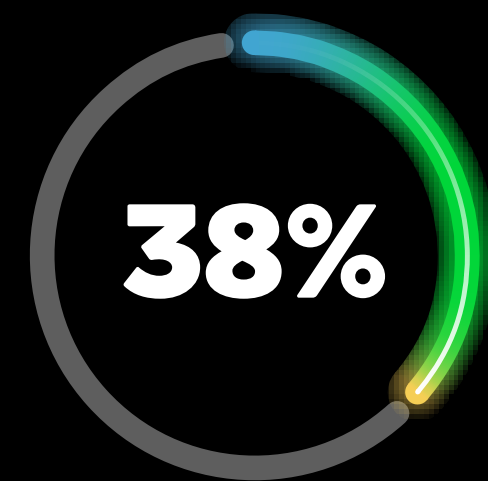
1. Source: *The Secrets of Successful CFOs, 2024*, page 27
2. Source: *The Secrets of Successful CFOs, 2024*, page 27

3. Source: *The Secrets of Successful CFOs, 2024*, page 22
4. Source: Sage CFO research, 2025

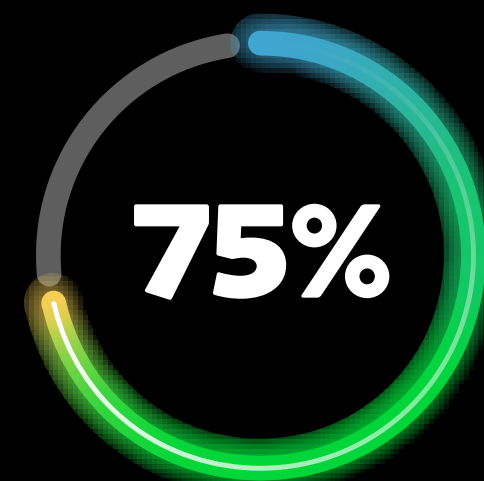
So, what's missing?

Most finance teams are stuck with AI tools that are either too generic or too disconnected, or both. That means teams are limited when using general-purpose tools in highly specific processes like reconciliation, variance analysis, and approval workflows. The result is clunky handoffs, patchy insights, and more time lost chasing down details that should have been surfaced instantly.

It's no surprise that:



of finance leaders say AI hasn't improved the close⁵.



say most AI marketing still fails to show how it helps⁶.

This isn't just about faster workflows. It's about having an AI assistant that understands accounting, works inside your system, and helps your team focus on strategic calls instead of manual cleanup.

This e-book explores how specialist AI tools begin to unlock the full potential of AI in finance. You'll see how it can reduce month-end workloads, accelerate trusted insights, and put time back in your hands.



5. *The Secrets of Successful CFOs, 2024, page 22*

6. *Source: Sage CFO research, 2025*

A new mindset: From month-end stress to continuous closing

What if closing the books didn't feel like a finish line?

Continuous closing is a new way of working, and Sage is among the first to define it. Instead of saving everything for the end of the month, Sage helps finance teams handle close tasks throughout the month, so there's less stress, fewer surprises, and more time to focus on what matters.

In this model, journals are reviewed as they're posted. Subledger discrepancies get flagged and fixed early. Variances are explained in the flow of work, not after the fact.

As Dan Miller, EVP Financials & ERP at Sage, puts it: "We're not eliminating the close...yet, but we're stripping out the waiting, the back-and-forth, and the last-minute fire drills. That's the part that's always been missing."

When finance isn't stuck catching up, there's room to lead. This shift creates space for scenario planning, real-time analysis, and stronger collaboration across the business.

95% of CFOs want a faster close⁷. In teams that have adopted the right technology, what used to take 15 to 20 days now takes five through automation alone. When CFOs and their teams lean into AI, they can strive for an even faster close that is cleaner, and more consistent. Finance leaders are spending less time chasing numbers and more time making them mean something.

Continuous closing isn't just a theory; it's here, giving you a better way to work and a smarter way to lead.

95%

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⁷ Sage CFO research, 2025

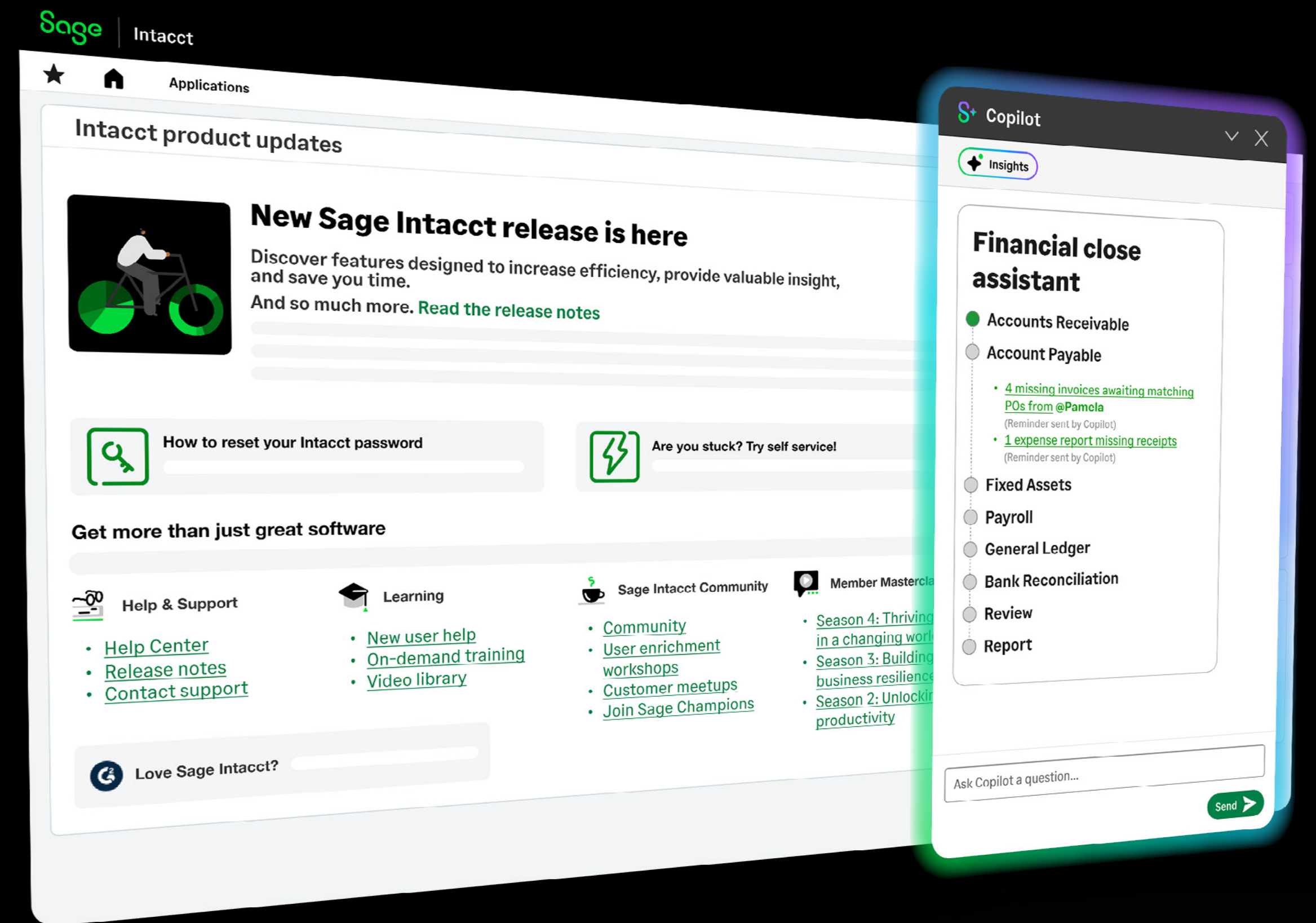
Turning vision into reality: How Sage Copilot makes the continuous close possible

Most finance teams want to work this way. That's where Sage Copilot comes in.

Sage Copilot has been built to support what you need as a finance leader by embedding finance-trained AI inside the core workflows of Sage Intacct, not as a separate app, but right where the work is already happening.

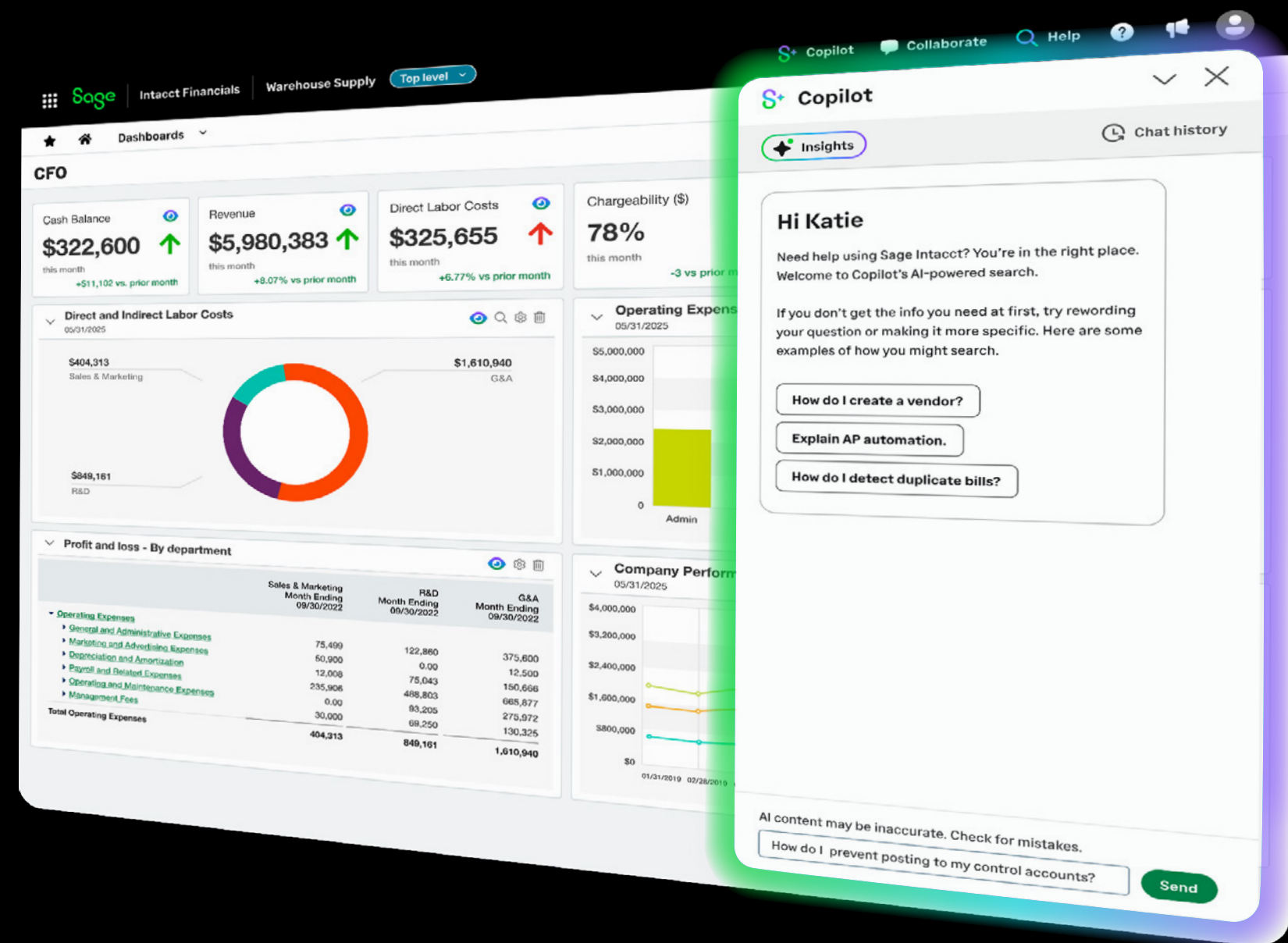
With Sage Copilot, the close becomes part of your daily flow. You see what's missing, and you're flagged when something looks off. You move faster and with more confidence because the system is guiding you.

This isn't automation for automation's sake. It's about eliminating friction, surfacing insights sooner, and helping you to operate with more clarity, every day.



Sage Copilot in action

Sage Copilot, our agentic AI productivity assistant, has been designed to support the entire record-to-report cycle, starting with the areas where finance teams lose the most time. It works inside Sage Intacct to keep the close moving, surface issues early, and guide your team through the next best step without ever needing to leave the system.



Here's how that looks in practice:



Close assistant

Month-end close is no longer a fire drill. Copilot provides real-time visibility across your financials and the general ledger, so your teams can track progress and identify what's still pending. It flags incomplete entries, unposted transactions, and unresolved approvals, so nothing falls through the cracks.



Continuous accounting

Sage Intacct with Ai helps get your data in more iteratively with connectivity between applications and AI-powered bill, timesheet, and expense entry. So your data is always up-to-date.



Continuous assurance

With Sage Intacct you can flag outliers at transaction entry, when it's easier and less costly to fix, providing cleaner data at the source. Sage Copilot automates reconciliation by continuously comparing subledgers to the general ledger. Instead of waiting for the close, it surfaces discrepancies early and explains what's causing them. This enables you to address issues directly within the workflow. Variances are monitored throughout the month, with clear alerts and context behind what's changed and why.



Continuous insights

With transaction data flowing continuously into your financial solution and continuously assured, your data is trusted and ready for insights. With trusted data, you can share ongoing business insights and accelerate decision-making.



AI-powered search help

With built-in, natural language search, you can ask questions like "How do I prevent posting to control accounts?" and get quick, accurate responses without leaving your workflow or disrupting a teammate.

Every feature is built to make high-effort, low-impact tasks easier to tackle, allowing you to stay focused on the bigger picture of impacting business growth.

From friction to impact: What changes with embedded AI

Sage automation and integration capabilities enable customers to shorten their monthly close up to 90%. With AI embedded into daily workflows, finance teams can save up to 12 days of effort each month. That's a huge win for efficiency and will enable a shift in how finance leaders show up across the business.

Although 90% of CFOs say they use AI to support the close, only 22% of CEOs use specialist, accounting-trained AI⁸. Leaders who adopt embedded, finance-trained AI are reclaiming time, trust, and collaboration across teams. They're using technology not just to accelerate tasks, but to elevate the role of finance. That's translating into more confidence, more clarity, and more influence on business growth.



**reduction in
monthly close.**

Leading the future of finance

CFOs are under pressure to do more, move faster, and lead with greater clarity. But high-performance finance doesn't come from working longer hours. It comes from leading the way in eliminating friction and building trust in the data.

Sage Copilot makes that possible. It turns the close into a daily rhythm. It brings intelligence into the core of your workflows and creates the time and space you need to stay ahead of what's next.

[Find out more about Sage Copilot today](#)

This is the infrastructure for modern finance.

The CFOs who embrace that mindset now will be the ones defining high-performance finance in the years to come.



AI is not about being a bit faster or sparking a clever idea—it's about rethinking how finance operates entirely. Everyday AI tools like ChatGPT are just the tip of the iceberg. The real transformation is in building domain-specific agents that understand accounting, compliance, and the cadence of month-end.

Aaron Harris
CTO, Sage



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Finance Software

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