GrowCFO

AI • PLANNING • FORECASTING

AI in Planning, Budgeting and Forecasting Survey 2026

Survey findings report

Finance leader survey findings

August 2026

273 valid survey responses

ACTERYS by Vena Solutions

Independent GrowCFO survey of the GrowCFO community. Sponsored by Acterys.

FROM THE FOUNDER

Foreword

Planning, budgeting and forecasting are where finance turns uncertainty into action. This independent survey of the GrowCFO community gives a clear view of where teams are today: spreadsheet dependency remains high, interest in AI is accelerating, and finance leaders are unwilling to trade control for automation.

The opportunity is practical rather than theoretical—using AI to reduce manual work, reforecast faster and strengthen scenario planning, while keeping assumptions visible and decisions accountable.

I hope these findings help you benchmark your current approach and identify the next steps that will create the most value.

Dan Wells
Founder & CEO, GrowCFO

273
valid completed
responses

90.5%
finance leadership roles

59.0%
CFOs / Finance Directors

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Executive summary

The findings point to strong demand for faster planning with clear finance oversight.

01

86.1%

Spreadsheet dependency remains high

Use a spreadsheet-based or spreadsheet-led planning process.

02

74.0%

AI interest is ahead of adoption

Are exploring possible use cases or experimenting informally.

03

81.0%

Efficiency is the first use case

See reducing manual effort as AI's biggest opportunity.

04

65.9%

Investment intent is strong

Are likely to improve planning and forecasting within 12 months.

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Current State

CURRENT STATE

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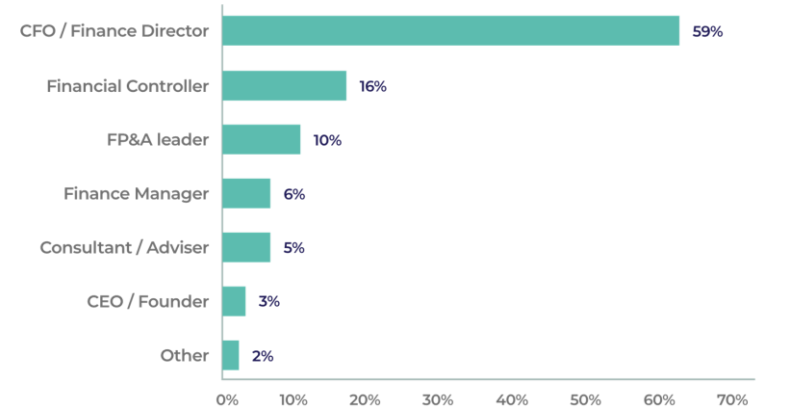
Respondent profile

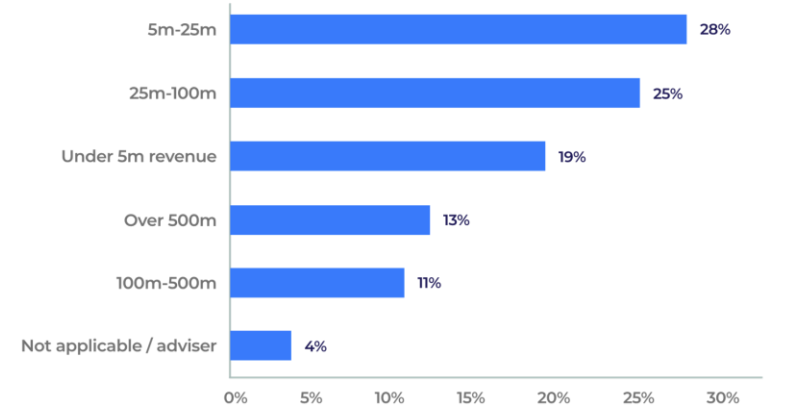
90.5% finance leaders

Finance leaders made up 90.5% of valid respondents.

Role



Organization size



What this means

The sample reflects finance decision-makers: 59.0% are CFOs or Finance Directors and 90.5% hold finance leadership roles. More than half work in organizations with £5m to £100m revenue, making the findings especially relevant to mid-market finance teams.

CURRENT STATE

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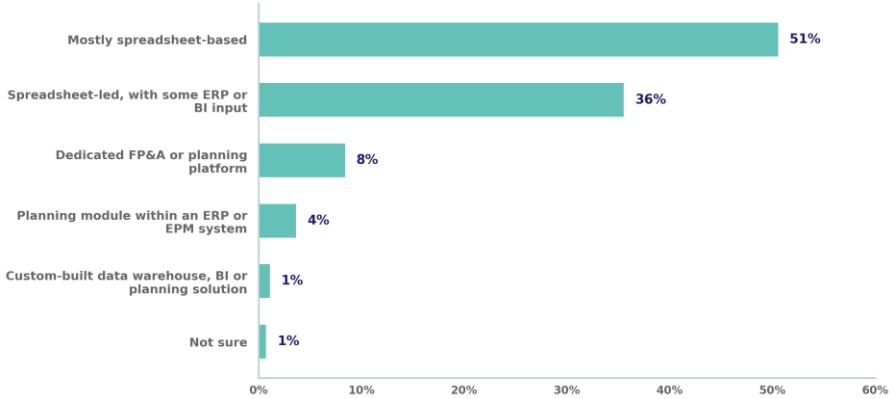
Current planning environment

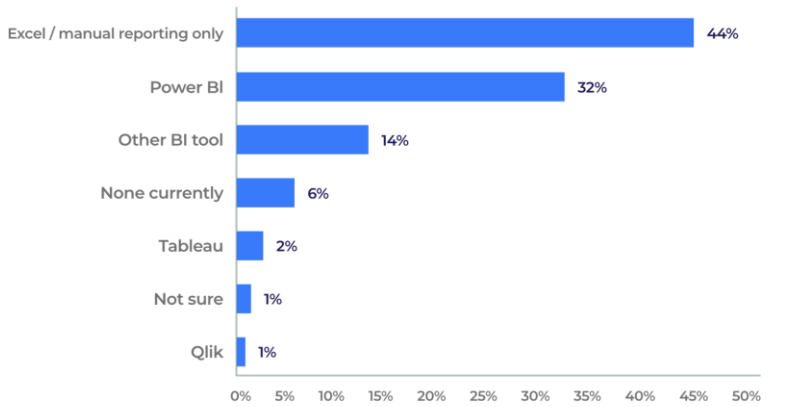
86.1% spreadsheet-led

86.1% remain mostly spreadsheet-based or spreadsheet-led.

Planning, budgeting and forecasting process



Primary reporting tool



What this means

Spreadsheet dependency remains the norm: 86.1% use spreadsheet-based or spreadsheet-led processes and 44.0% rely primarily on Excel or manual reporting. Many teams still work with fragmented planning workflows and limited automation.

CURRENT STATE

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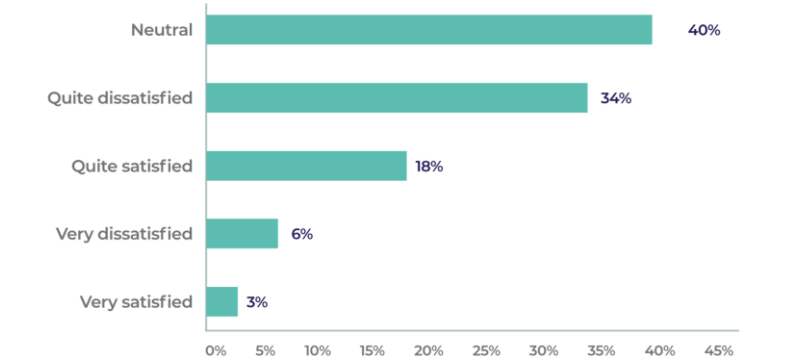
Satisfaction and forecast cadence

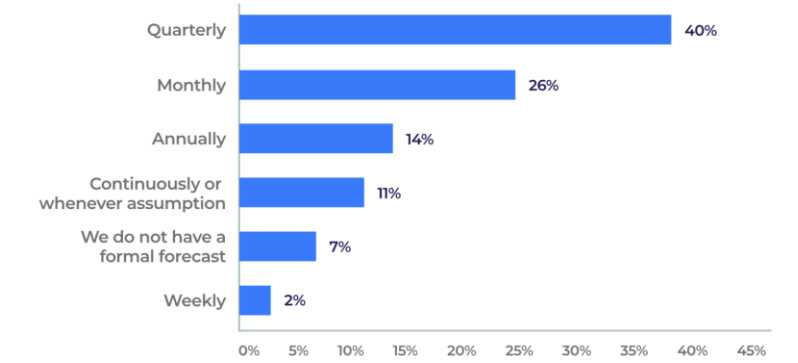
20.1% satisfied

Only 20.1% are quite or very satisfied with their current planning process.

Satisfaction with the current process



Formal forecast update cadence



What this means

Only 20.1% report satisfaction, while 39.9% are dissatisfied and another 39.9% are neutral. Quarterly forecasting is most common, which can limit responsiveness when assumptions or market conditions change quickly.

CURRENT STATE

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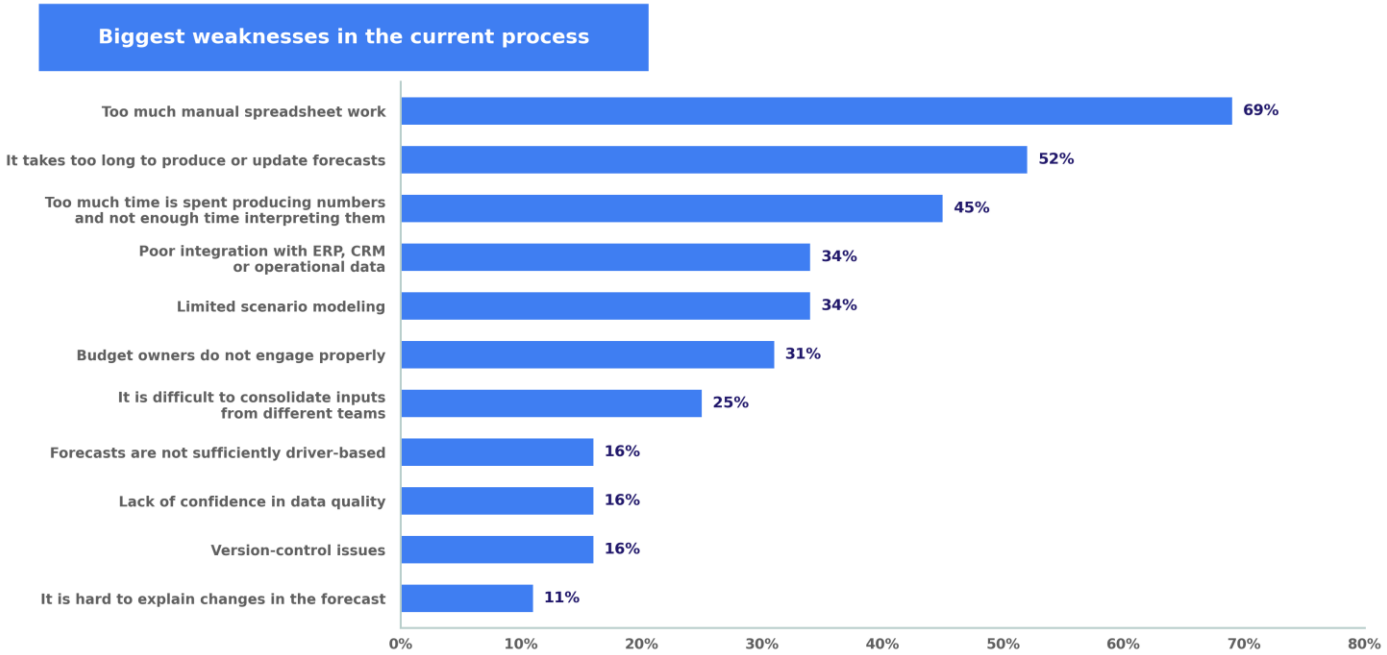
What is broken today

68.9% manual work

Manual spreadsheet work leads every reported weakness.



What this means

Manual spreadsheet work leads at 68.9%, followed by slow forecast production at 52.0% and too much time producing numbers at 45.1%. Current processes consume capacity that finance teams could spend on interpretation and decision support.

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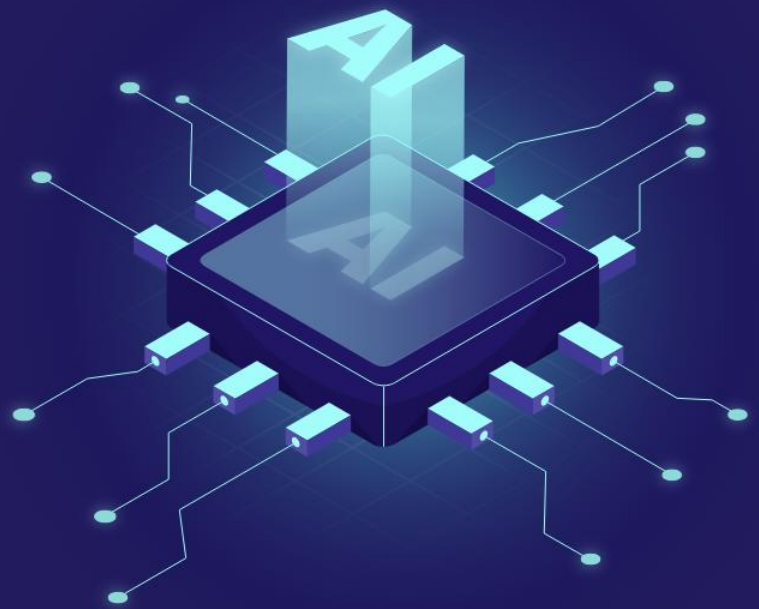
AI Adoption



AI ADOPTION

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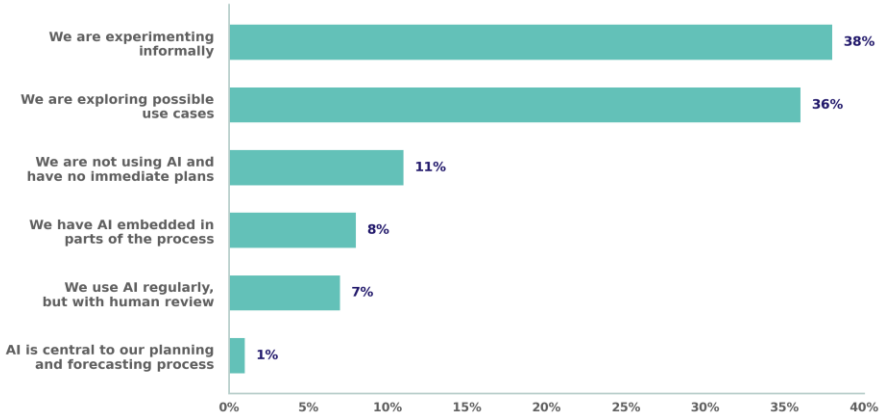
AI adoption remains early

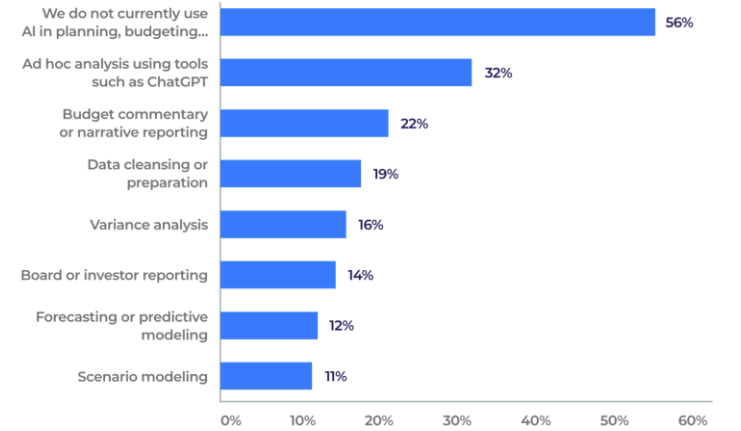
74.0% exploring AI

74.0% are exploring possible use cases or experimenting informally.

AI maturity



Where AI currently features



What this means

Interest is ahead of operational use. Although 74.0% are exploring or experimenting, 56.0% say AI does not currently feature in planning and forecasting. Most adoption remains informal and concentrated in ad hoc analysis or narrative tasks.

AI ADOPTION

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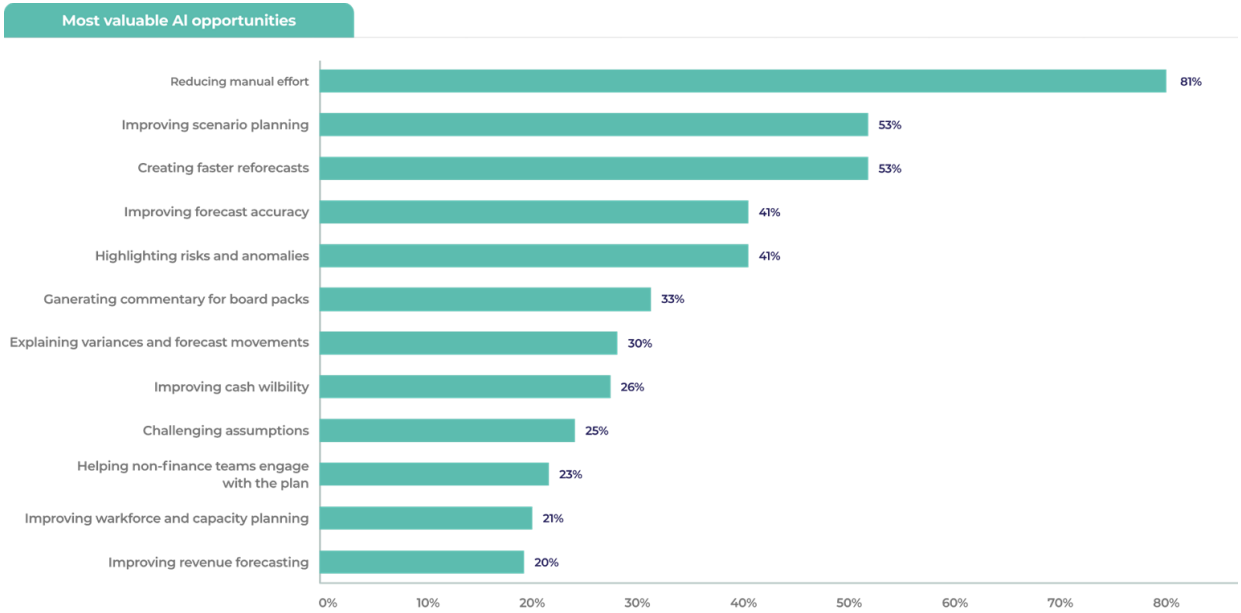
Where finance expects AI to add value

81.0% manual effort

Reducing manual effort stands well ahead of every other use case.



What this means

Reducing manual effort is the clear priority at 81.0%. Scenario planning and faster reforecasts follow at 52.7% each, showing that finance teams value AI most when it improves the speed and flexibility of existing processes.

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Trust and Investment

TRUST & INVESTMENT

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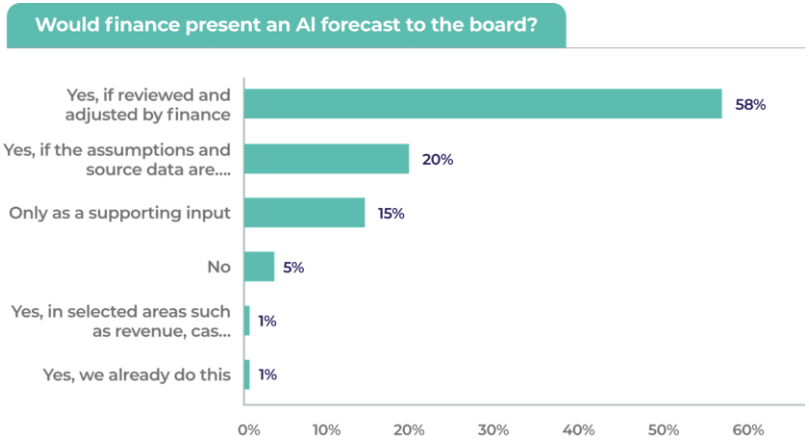
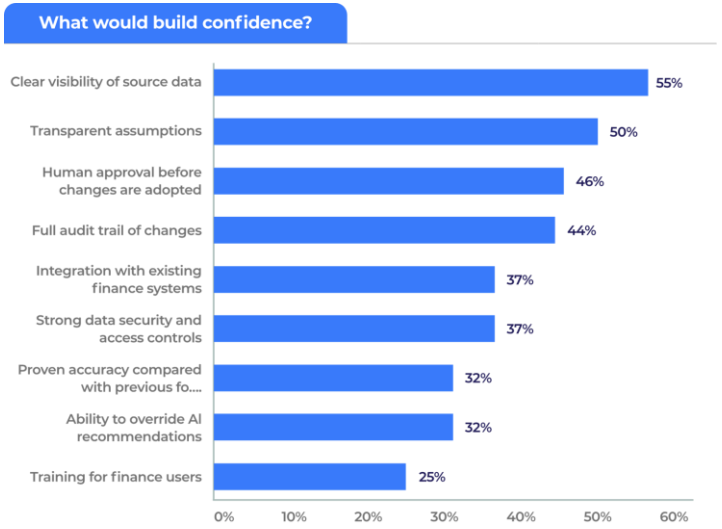
Trust depends on finance controls

78.4% board-ready

78.4% would present an AI forecast if finance reviews it or the inputs are transparent.





What this means

Finance oversight is central to adoption. 78.4% would present an AI forecast when finance reviews it or the inputs are transparent. Source visibility, clear assumptions and approval controls matter more than fully autonomous output.

TRUST & INVESTMENT

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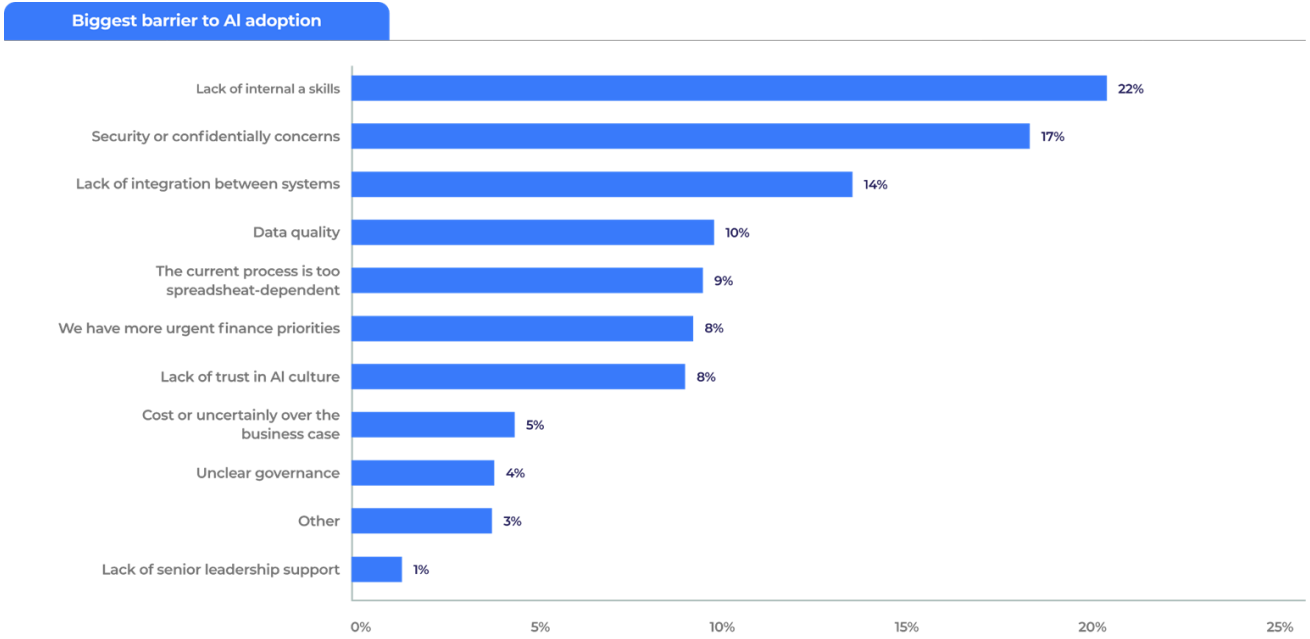
The main barriers are operational

53.1% top barriers

Skills, security and integration collectively account for 53.1% of respondents' top barriers.



What this means

Skills, security and integration account for 53.1% of the main barriers. Adoption depends on implementation support, controlled data access and compatibility with existing systems as well as forecast accuracy.

TRUST & INVESTMENT

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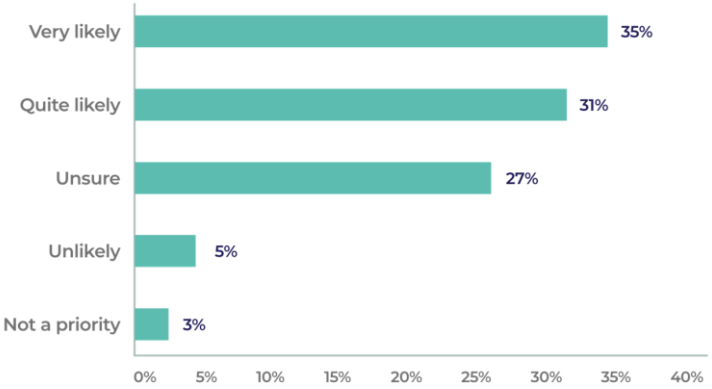
Investment intent is strong

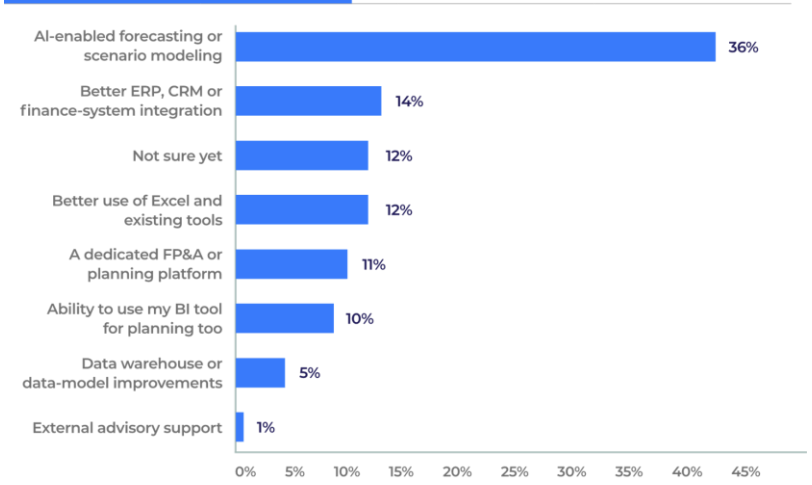
65.9% likely to invest

65.9% are quite or very likely to improve planning and forecasting within 12 months.

Likelihood of investment



Most likely improvement



What this means

65.9% are likely to invest within 12 months, and AI forecasting or scenario modeling is the leading improvement at 35.9%. The 26.7% who remain unsure will need practical use cases and evidence before committing.

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Key conclusions

Finance leaders want faster, more dynamic planning, with finance firmly in control.

1

Ambition is ahead of readiness

Finance leaders want AI to improve planning speed and forecast quality, but spreadsheet dependency, manual consolidation and disconnected data still limit progress.

2

The opportunity for finance

AI can reduce manual effort, accelerate reforecasting and strengthen scenario planning—helping finance interpret change sooner and focus judgment where it matters most.

3

Finance stays accountable

Sustainable adoption depends on visible source data, transparent assumptions, audit trails and human approval. The strongest model is AI-assisted planning with finance accountable for the outcome.

Connected data + explainable outputs + finance-led governance

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What CFOs should do next

Three practical moves to turn AI interest into controlled, usable planning capability.

Fix the planning foundations

Connect actuals and operational drivers, clarify ownership of assumptions and reduce manual consolidation before scaling AI across the planning cycle.

Prioritize practical use cases

Start with data preparation, faster reforecasts, scenario modeling and variance explanation. Measure time saved and decision impact.

Make trust part of the design

Give finance clear visibility of data and assumptions. Keep changes auditable, define approval points and retain human review for material decisions.

THE CONCLUSION

CFOs appear ready for AI-assisted planning, but not black-box automation. Progress will depend on connected data, explainable outputs and finance-led governance.

ACTERYS
by Kena Solutions

Enterprise Write-back & Planning in

Power BI | Microsoft Fabric | Excel

Acterys brings governed write-back, planning and business applications into Power BI, Fabric and Excel so teams can plan, forecast, model scenarios, capture business input, and build custom business apps with governance and control, where they already work.

f5

> You enter the people, do a refresh, and within seconds the impact flows through to every report.
>
> **Anatoliy Chernoshnyuk**
> Financial Systems Manager

Plan entry to variance impact in seconds.

Faster response to change
Update plans and forecasts as business conditions shift.

Less manual reconciliation
Keep assumptions, versions and contributions connected.

Better planning control
Manage scenarios, workflow, approvals and audit history.

Stronger financial alignment
Connect operational decisions to their financial impact.

More value from Microsoft investments
Extend Power BI and Fabric from analytics into governed processes.

Less technology sprawl
One reusable foundation for planning, write-back and business applications.

Key use cases

Finance & FP&A
- Budgeting & rolling forecasts
- Scenario modeling
- Workforce, revenue, OPEX & CapEx
- Management consolidation

Operations & S&OP
- Demand, supply & inventory planning
- Capacity planning
- Forecast overrides
- Cross-functional S&OP

Data & Analytics / IT
- Governed Power BI write-back
- Data enrichment & master data
- Workflow & approvals
- Power BI applications

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Thank you