AI readiness: A 10-step checklist for finance leaders

Getting AI to work in finance isn't about deploying the latest technology – it's about changing how your team works. Use this checklist to turn AI pilots into proven workflows that deliver measurable time savings, improved accuracy and strategic impact.

Ready to get started?

Lets go →

1. Start with one workflow

- Pick a high-volume, repetitive, rule-based process like invoice matching, expense categorisation, month-end variance explanations or supplier contract summaries.
- The goal is to win fast, learn fast and build momentum.

2. Build a small cross-functional squad

- Include a finance lead, an IT/Ops partner and a change champion.
- Give them time, decision rights and a clear mandate.

3. Set success metrics upfront

- Define specific targets before you start.
- For example: time saved (-40%), user satisfaction (≥80%) and close acceleration (-2 days).

4. Clean your data early

- Standardise categories, suppliers and classifications.
- Spend 2-4 weeks cleaning the core datasets to boost accuracy and adoption.

5. Pick the right tools, not the loudest

- Evaluate on integration, security, usability and vendor viability.
- Tip: Purpose-built AI in your spend platform (e.g. Spendesk) often beats generic tools.

6. Pilot fast, measure faster

- Launch a focused pilot with real work and real users. Track metrics weekly, gather feedback and iterate fast.
- Pause and diagnose if adoption or impact remains low after six weeks.

7. Upskill your team on prompt fluency

- Teach clear prompts, when to use AI and how to verify outputs.
- Run a 90-minute workshop, share a prompt library and offer office hours.

8. Establish governance from day one

- Define approved tools, allowed data, verification steps, accountability and error handling.
- Share a one-page AI usage policy with the whole team.

9. Communicate wins early

- Share time saved and quality gains in team and leadership forums.
- Spotlight power users to drive adoption and reduce scepticism.

10. Keep a human in the loop

- Require human review for approvals, sensitive comms, edge cases and regulated areas.
- Use AI to draft/analyse and humans to decide.

Get started with Spendesk

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AI works best when it's embedded in daily finance workflows. Spendesk brings purpose-built AI to spend management – automating policy compliance, accelerating month-end close and freeing teams for higher-impact work.

Give your team the complete solution they need to work smarter, not harder, and turn AI into your competitive advantage.

Book a demo →

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