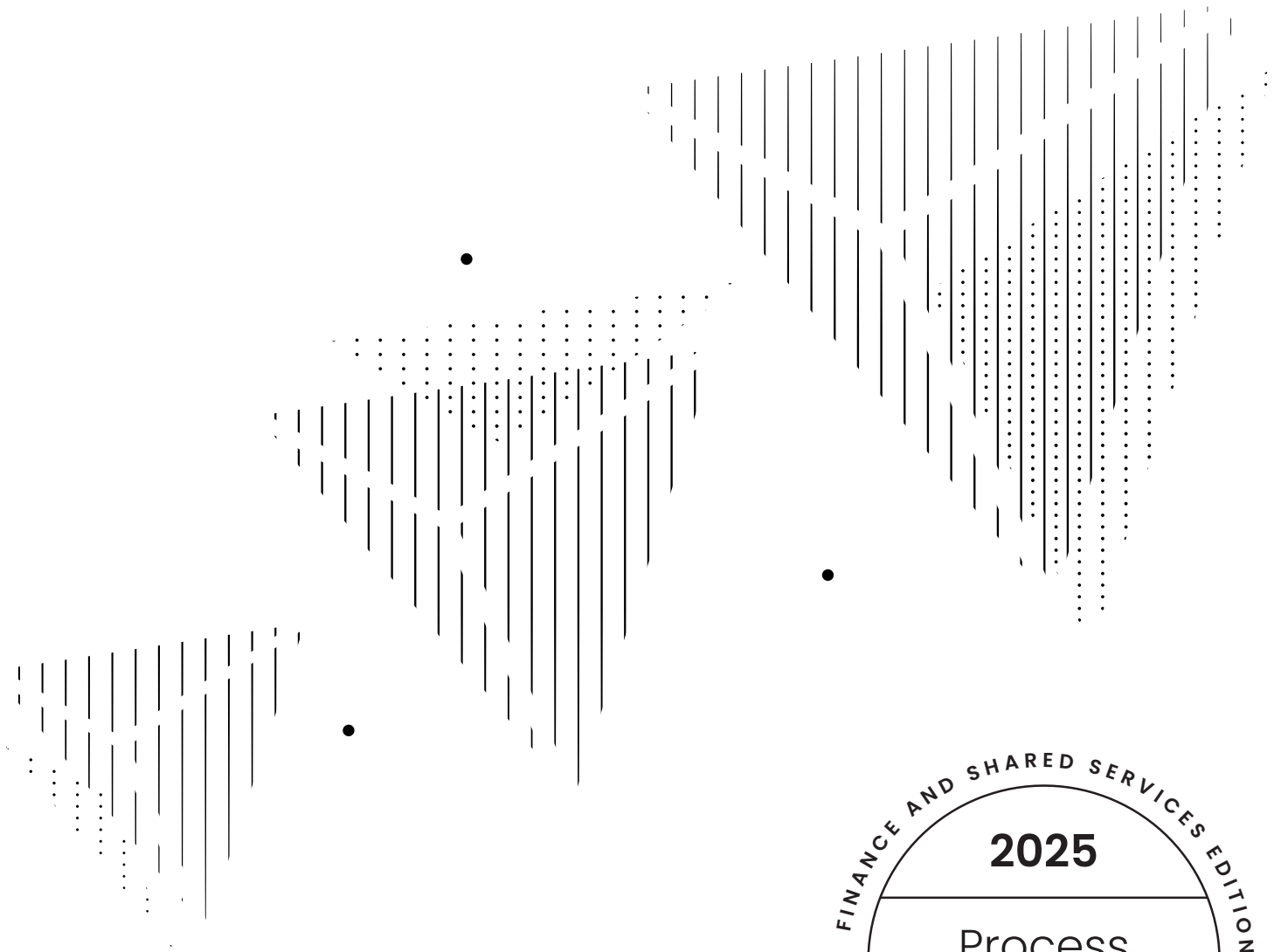


Follow the money

When processes work, Finance and Shared Services can lead value creation



Contents

The people perfectly placed to lead process improvement	03
Section one:	04
How teams are adapting to their leadership role	
The macroeconomic pressures teams face	05
The new skills teams need most	07
Value hunting is becoming a vital skill	08
Section two:	09
What people expect from processes that work	
Productivity is expected from process optimization	10
Process know-how positions teams to drive improvement	11
Section three:	12
The process optimization and AI interconnection	
The tools used for process improvement	13
How Finance and Shared Services are investing in AI	15
Effective AI needs process optimization	18
What's next?	
Taking the lead with Process Intelligence	21
Survey sample	23

The people perfectly placed to lead process improvement



The five editions of the 2025 Process Optimization Report

The work of Finance and Shared Services teams impacts the entire organization. The processes they are involved in – think Order-to-Cash and Purchase-to-Pay – depend on, and have an effect on, just about every other business process. When Finance and Shared Services optimize their end-to-end processes, this has a positive impact on other departments, unlocking opportunities across the entire enterprise. And this puts them in an ideal place to lead process improvement.

Leading transformation is business-as-usual for Shared Services teams. But for Finance, which was once seen as a largely administrative function, it's a less familiar role that requires new skills and ways of working. To find out how these teams are adapting to their trailblazing roles, we surveyed 400 Finance and Shared Services leaders in Australia, Austria, France, Germany, Japan, South Korea, Spain, Switzerland, the UK, and the US.

A considerable 88% feel their department needs to be more cross-functional than ever, operating in sync with other parts of the business. And the same proportion (88%) say they need more visibility into processes than the rest of the business so they can drive improvement.

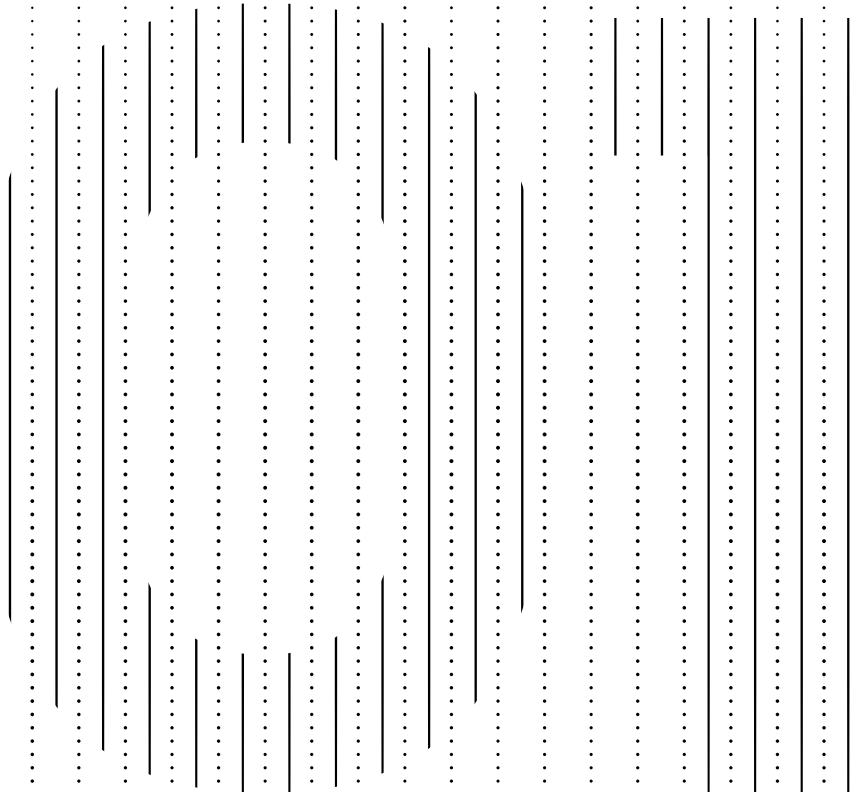
Expected rewards are significant, with 91% believing there's untapped value in their departmental processes, and 40% saying the value is 'massive'.

Read on to find out more about the pressures their departments are under, what process optimization tactics they're using, and what outcomes they're expecting from process improvement. They also told us how they're using AI, and how this interconnects with process optimization.

This report forms part of a series of reports from a larger study of 1,620 business leaders, which includes respondents from the Supply Chain, IT, and Process and Operations functions. Throughout the report we'll draw comparisons with these other departments where it's relevant to do so. We'll also use data from our 2024 report to highlight trends and changes.

Let's get started.

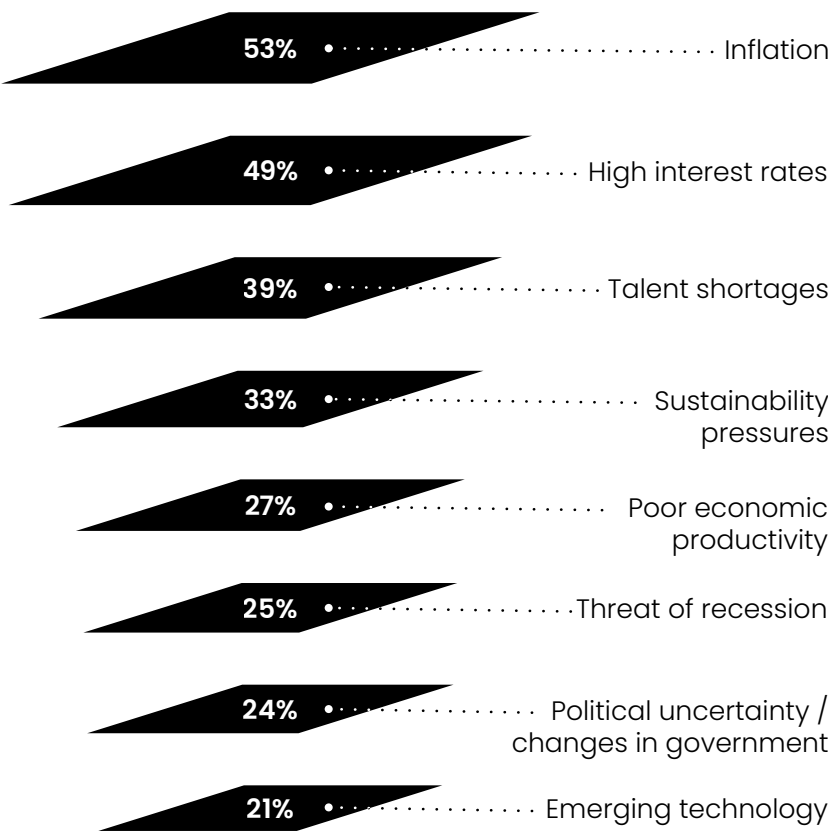
How teams are adapting to their leadership role



The macroeconomic pressures teams face

To understand the macroeconomic challenges Finance and Shared Services teams face, we asked whether or not the following factors (current or potential) put pressure on their departments.

The greatest macroeconomic pressures



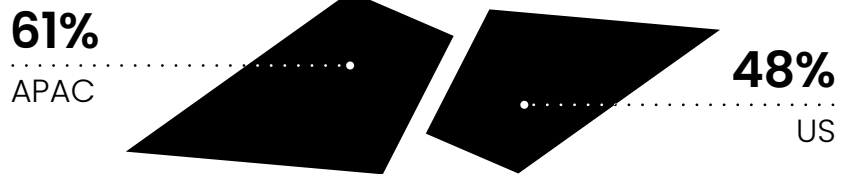
The two most significant pressures identified across all regions are inflation and high interest rates. But even these are only selected by around half of respondents, suggesting the other half don't necessarily recognize them as pressures. Factors like the threat of recession, political uncertainty, and emerging technology are only identified as pressures by a quarter of respondents, or fewer.

Overall, the majority of Finance and Shared Services leaders don't see factors other than inflation putting pressure on their departments, perhaps indicating their teams are optimistic and able to remain stable and focused even in tough conditions.

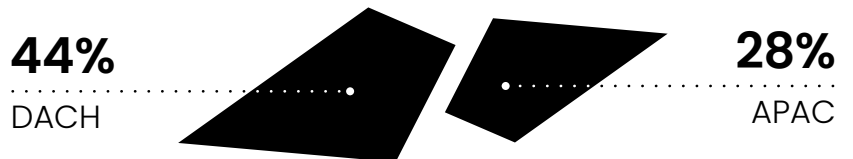
There were some differences in the macroeconomic pressures felt by Finance and Shared Services teams in different regions. The most notable are:

● Macroeconomic pressures vary by region

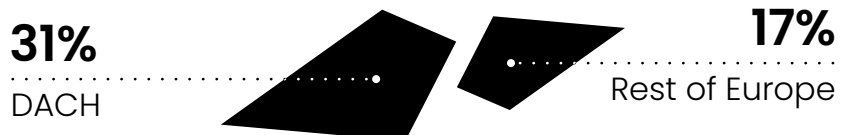
Inflation



Sustainability



Threat of recession



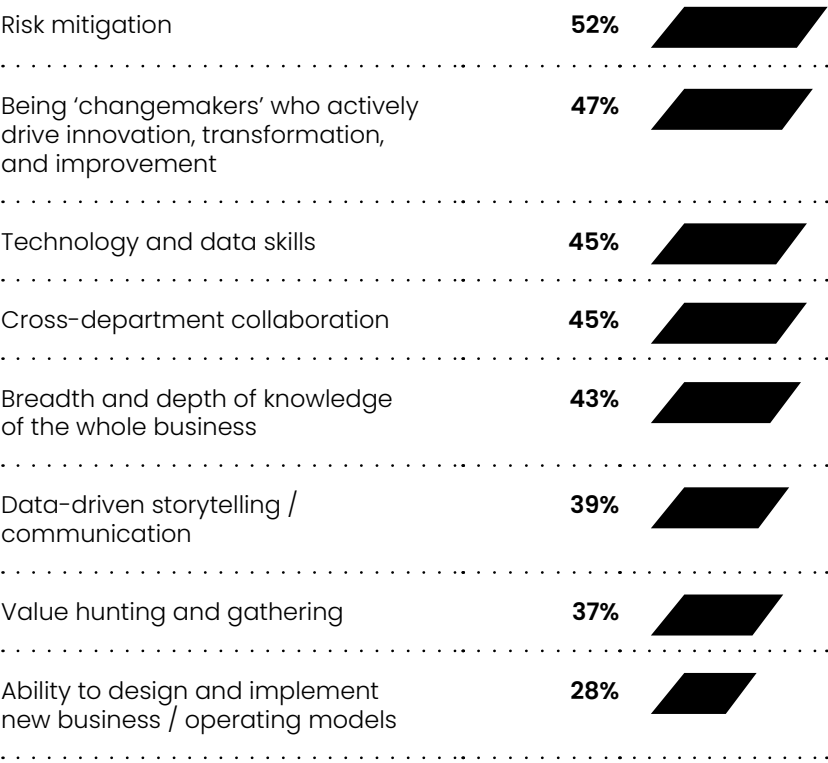
The new skills teams need most

The vast majority (88%) of Finance and Shared Services leaders say their departments need to be more cross-functional than ever, operating in sync with other parts of the business. For years they've kept the wheels of the business turning. Now they need to reimagine how those wheels turn.

We asked respondents to identify the skills and qualities they believe are increasing in importance for their teams. The top answer is risk mitigation skills, which is to be expected as managing risk is bound to be top of mind for these teams when considering any transformation.

The next answers relate to leading transformation and working more cross-functionally, with 47% saying they need to become changemakers, 45% saying they need to improve cross-department collaboration, and 43% saying they need to gain broader knowledge of the whole business.

Skills that are becoming increasingly important



Value hunting is becoming a vital skill

Increasing process understanding will help Finance and Shared Services leaders work in harmony with other departments, drive transformation, and find opportunities to create value. A huge 91% of Finance and Shared Services leaders think there's untapped value in their departmental processes, and we've just seen that over a third (37%) think value 'hunting and gathering' is becoming an increasingly important skill for their teams.

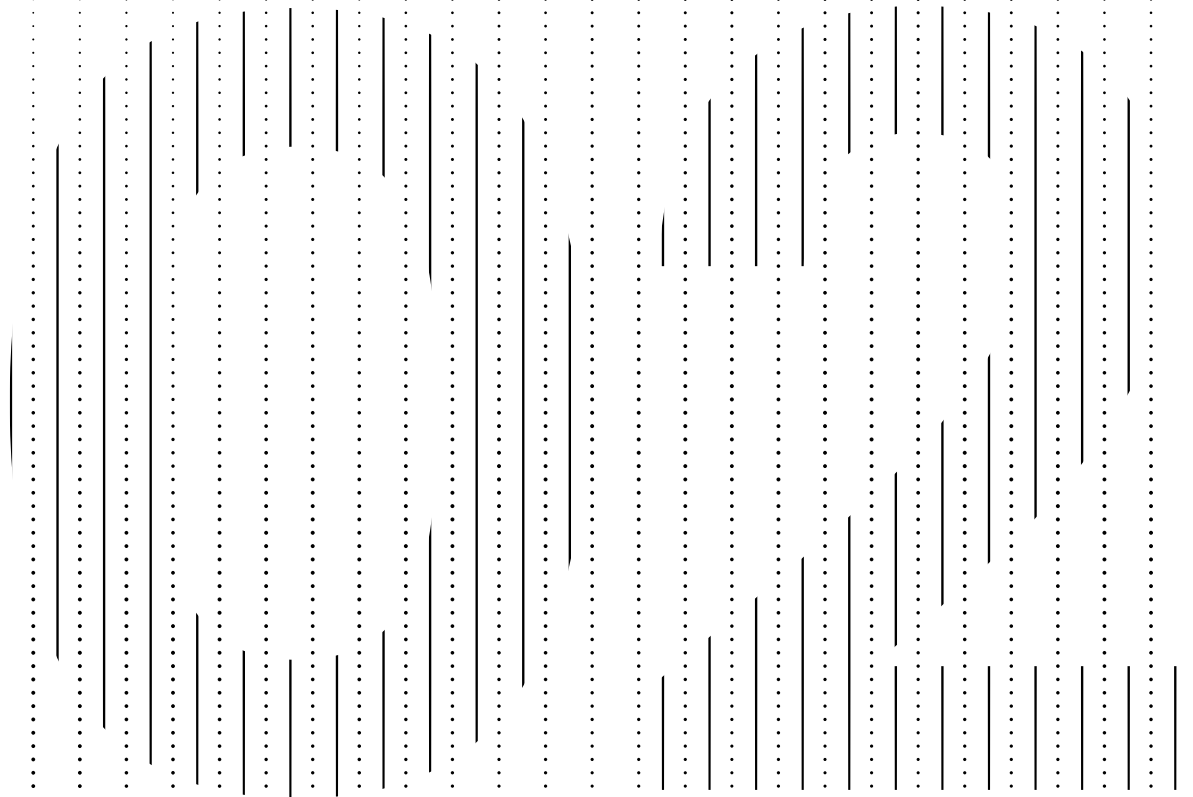
88%

say they need more process visibility than the rest of the business to drive improvement

83%

say they urgently need to understand how their processes work to create more value

What people expect from processes that work



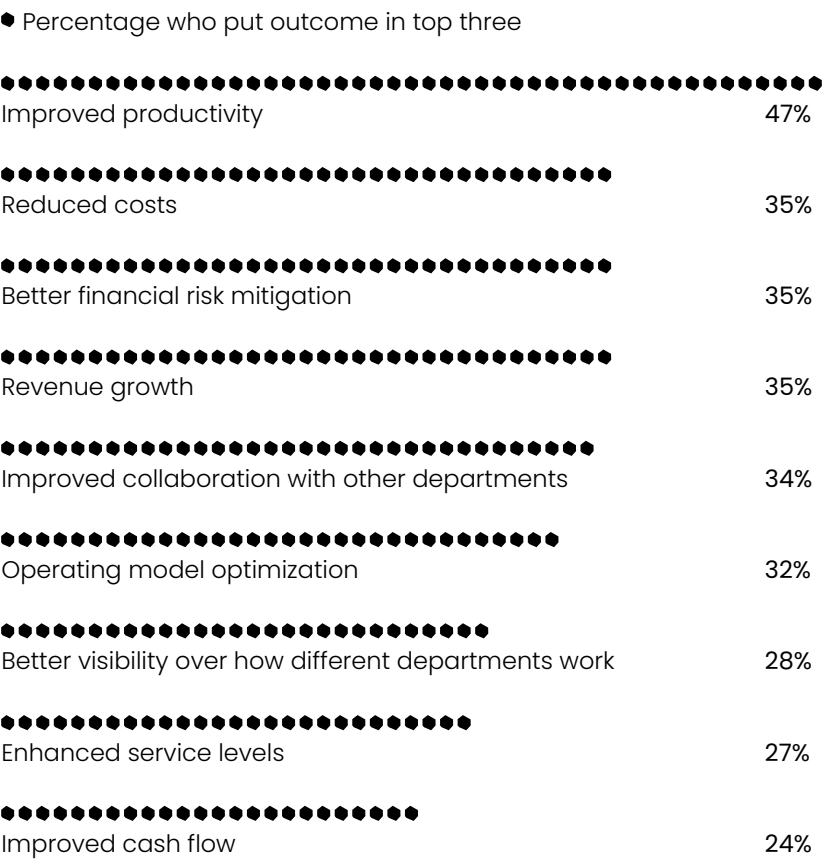
Productivity is expected from process optimization

So what types of opportunities are Finance and Shared Services leaders looking to unlock with process improvement? We asked them to select the top three outcomes they expect from better process visibility and process optimization.

Improved productivity comes out top of the list by a significant margin. Using time wisely, on tasks that will impact overall business objectives, is clearly a priority, which potentially includes automating repetitive tasks and freeing up time to be spent more strategically. Reduced costs, better financial risk mitigation, and revenue growth all tie for second place, which is to be expected as they are common finance goals.

Interestingly, improved collaboration with other departments is seen as almost as important as those more typical, statistical outcomes. It is the first of the less expected outcomes, and is cited as a top-three outcome by over a third (34%).

Expected outcomes of process optimization

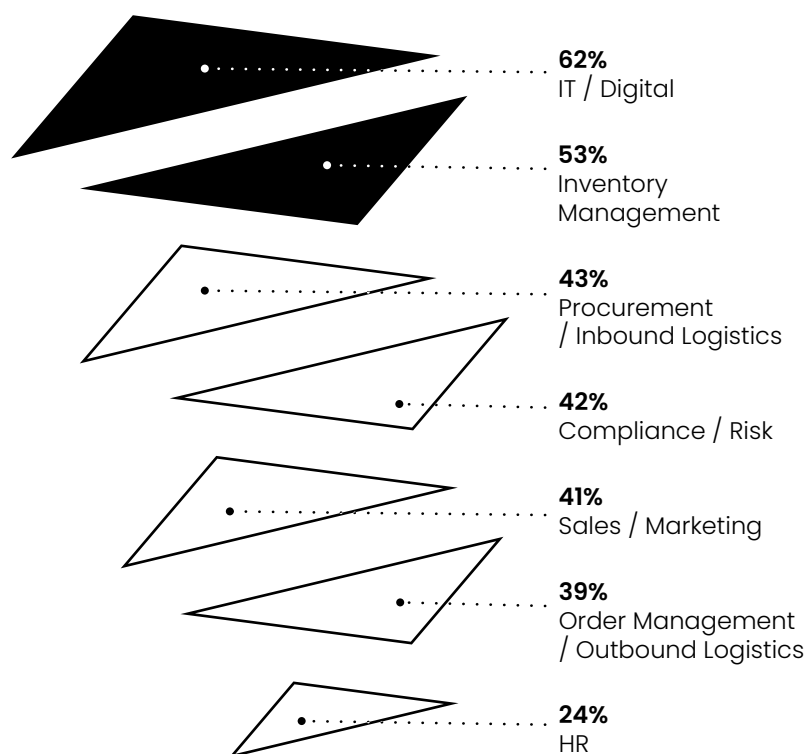


Process know-how positions teams to drive improvement

We asked the 34% of Finance and Shared Services leaders who expect process optimization to improve collaboration with other departments which relationships they think would benefit most.

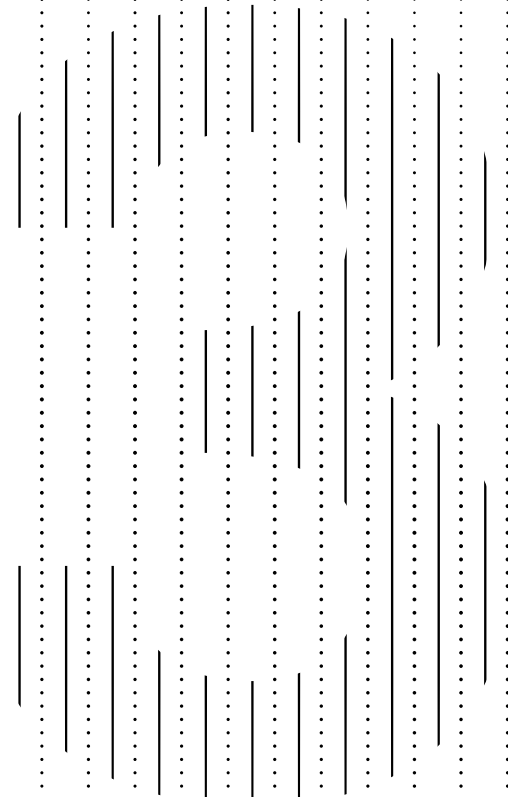
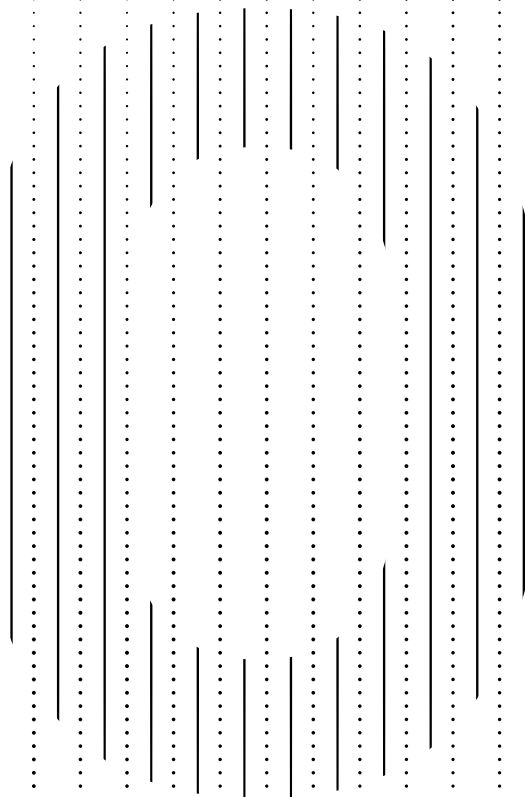
They expect getting better visibility into their end-to-end processes is most likely to benefit their relationships with IT (and Digital) teams, as well as with Inventory Management, but the spread of answers shows that increased process visibility could improve their relationships with every department.

Finance and Shared Services relationships that would benefit from process visibility



Finance and Shared Services are teams with long-developed process know-how. Because they work with and across so many departments, and have a horizontal understanding of how each of those departments work, they are strategically placed to drive change. If they're equipped with the right technologies to make processes work, they can be true pioneers not just of process improvement, but business improvement at large.

The process optimization and AI interconnection

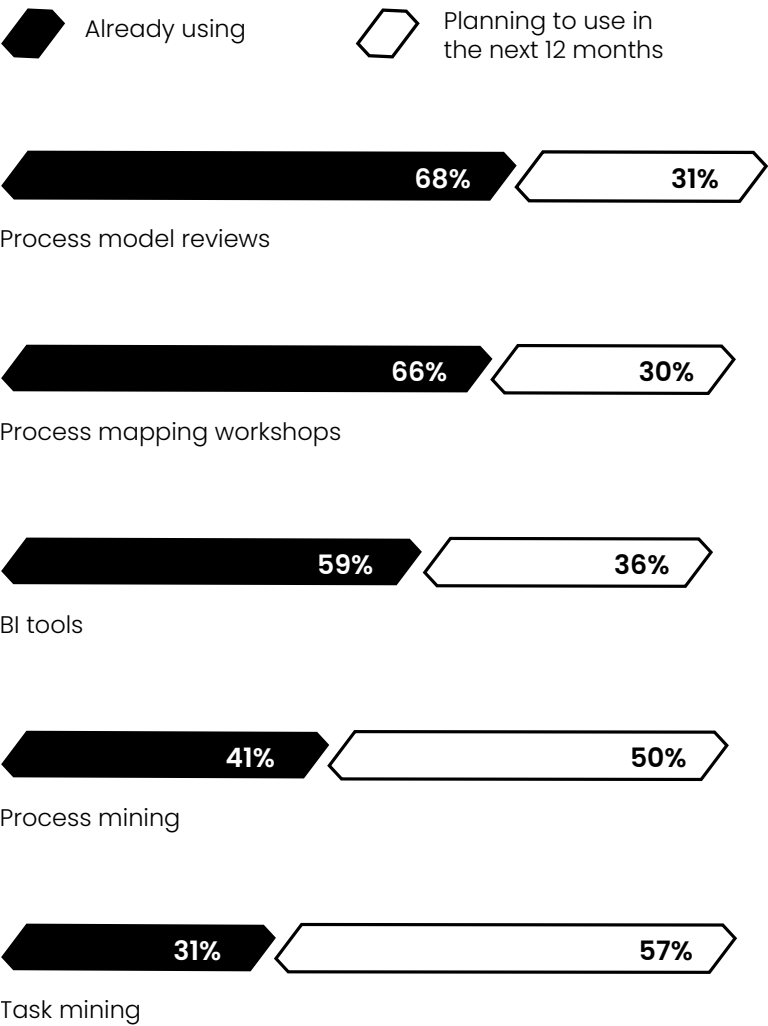


The tools used for process improvement

We asked Finance and Shared Services leaders what tactics they currently use, or plan to use in the next 12 months, to increase visibility of their business processes.

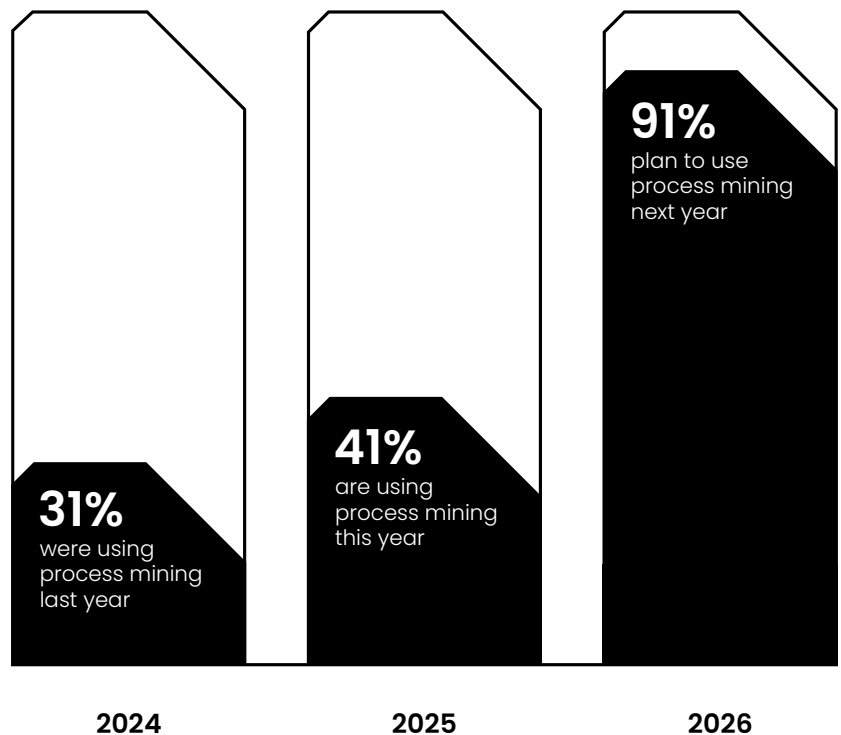
Their responses reveal 99% will review existing process models in the next year. There’s still a heavy reliance on process mapping workshops, which are time consuming and generate inaccurate information that only indicates people’s perceptions of how processes run, rather than how they actually run. The majority of these teams are also using business intelligence (BI) tools, which can provide insights into what’s happening in the business but don’t necessarily empower them to take action or help them understand the root causes of inefficiencies.

Tools used for process visibility



Currently 41% of Finance and Shared Services teams are using process mining, which is fast, accurate, and actionable because it visualizes, analyzes, and optimizes business processes by leveraging real-time and historical data.

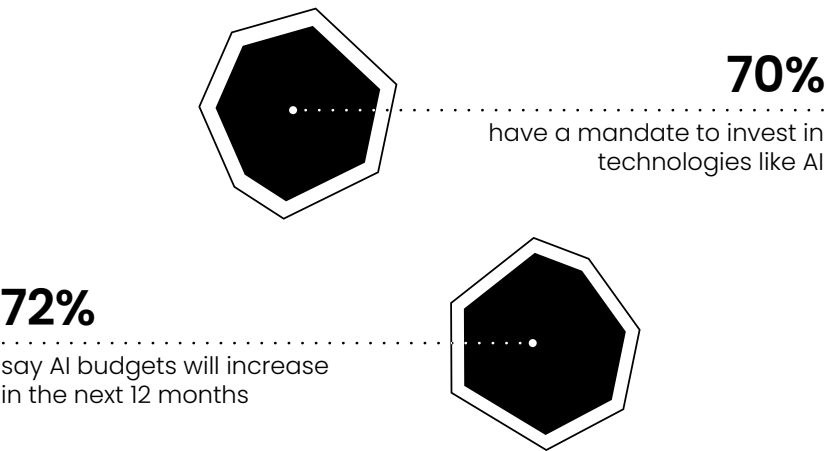
This is a significant increase from the 31% that said they were using process mining in our 2024 report. What's more, a further 50% intend to use the technology in the near future.



Finance and Shared Services leaders are adopting emerging technologies in their quest to get processes to work – and capture value from them. Some 81% say AI will be used to directly improve business processes in the next 12 months.

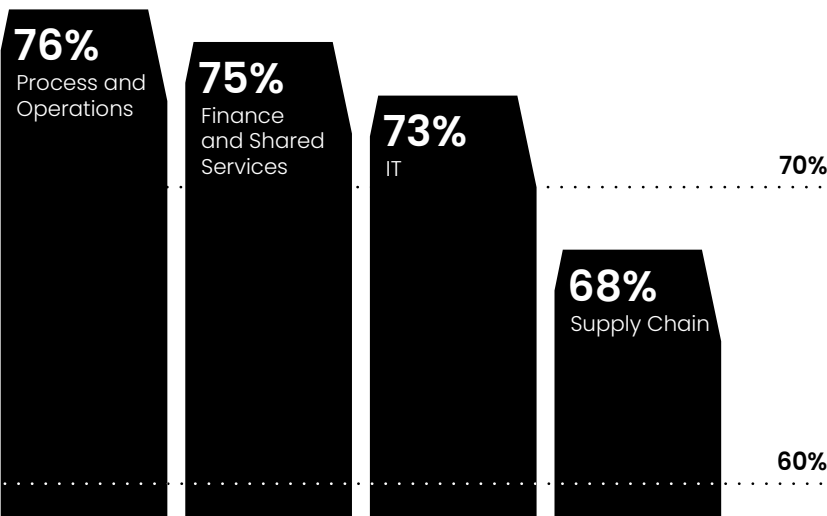
How Finance and Shared Services are investing in AI

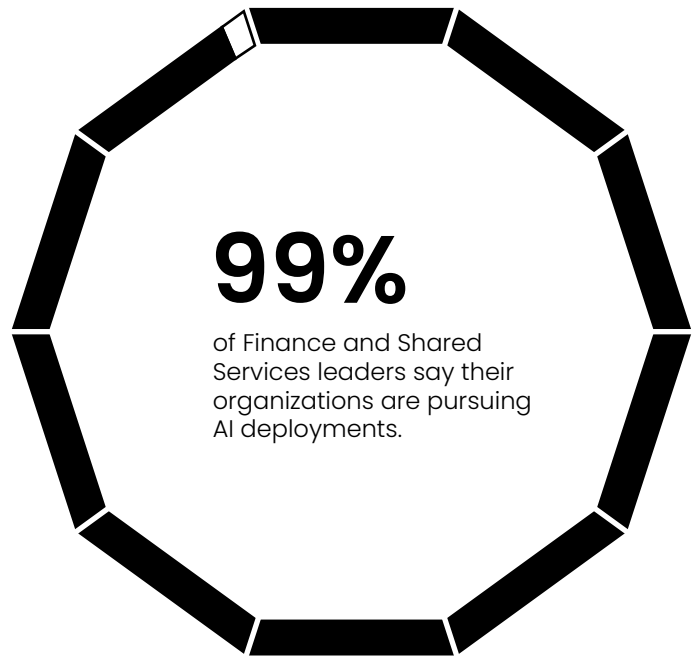
Overall, Finance and Shared Services leaders have a positive outlook on AI. They say they have a mandate to invest in AI-powered technologies that will drive business efficiency, and they expect their AI budgets to increase this year.



Three-quarters (75%) say there will be established use cases in their departments in the next 12 months, along with associated policies and usage guidelines. This is a slightly higher proportion than in Supply Chain and IT departments, and very nearly as high as in Process and Operations teams.

Departmental expectations for AI use cases





We asked how their departments specifically are using AI or plan to use it in the next 12 months.

As you'll see on the next page, automating routine tasks is the most common existing use case, with 54% already using AI for this purpose and a further 41% planning to do so in the coming year.

When answering additional questions, Finance and Shared Services leaders reveal 73% of their processes are already partially or completely automated, and their top goal with automation is to do more with the resources they already have.

How Finance and Shared Services are using AI



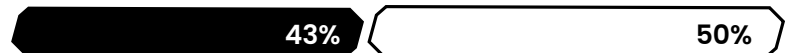
Already using AI



Planning to use AI in the next 12 months



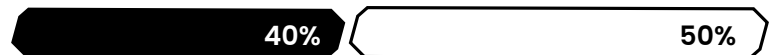
Automate routine tasks



Financial reporting and analysis



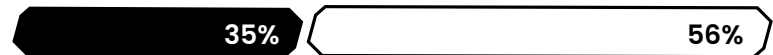
Fraud detection



Financial forecasting and planning



Cash flow optimization



Expense management



Regulatory compliance

Overall, Finance and Shared Services teams are pushing forward with AI adoption. Even in areas where AI is less commonly deployed, such as cash flow optimization, expense management, and regulatory compliance, the intention to use AI in the coming year is high.

Effective AI needs process optimization

Finance and Shared Services leaders understand that to effectively deploy AI, the technology needs to understand their business processes. In fact, 90% say it's crucial that AI has the context of how their business runs, how they calculate KPIs, what their policies and procedures are, and how their organization is structured.

What's more, a significant 60% say they are concerned the current state of processes in their organization may limit the value they can achieve with AI.

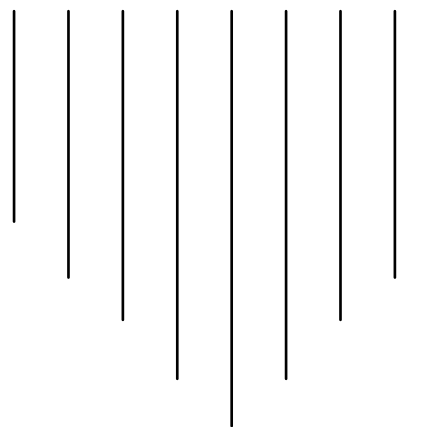
90%

say it's crucial AI knows how their business runs to be effectively deployed

60%

are concerned their processes may limit the value they can get with AI

The bond between processes and effective AI is undeniable – check out how the two play off each other.



What's the deal with AI and processes?

Celonis Process Intelligence (PI) gives AI the context it needs to be relevant and effective for your business. There's no enterprise AI without PI.

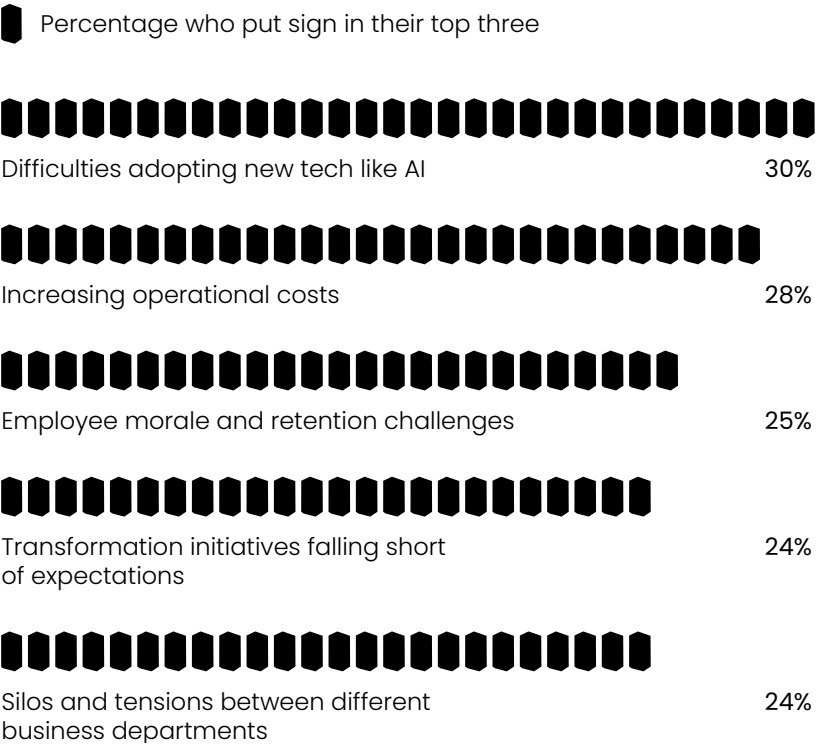
How does it work? After Celonis PI creates a digital twin of a business's end-to-end processes, it then uses AI algorithms to show teams where value opportunities lie and how to capture them.

At the same time, PI provides AI agents, co-pilots, and assistants with the contextual data they need to understand how processes run and interact, like KPI definitions or a business rule that says all invoices above \$25,000 have to go to the Finance Director for approval. All that means PI provides the relevant insights that are essential to effectively automate processes with AI agents.

The importance of process optimization in enabling AI applications is further illustrated when we asked Finance and Shared Services leaders what they see as the three biggest signs that an organization doesn't understand how its processes are working. Difficulties adopting new tech like AI come top of the list.

Finance and Shared Services leaders see difficulties adopting AI as the biggest sign organizations don't understand how their processes are working.

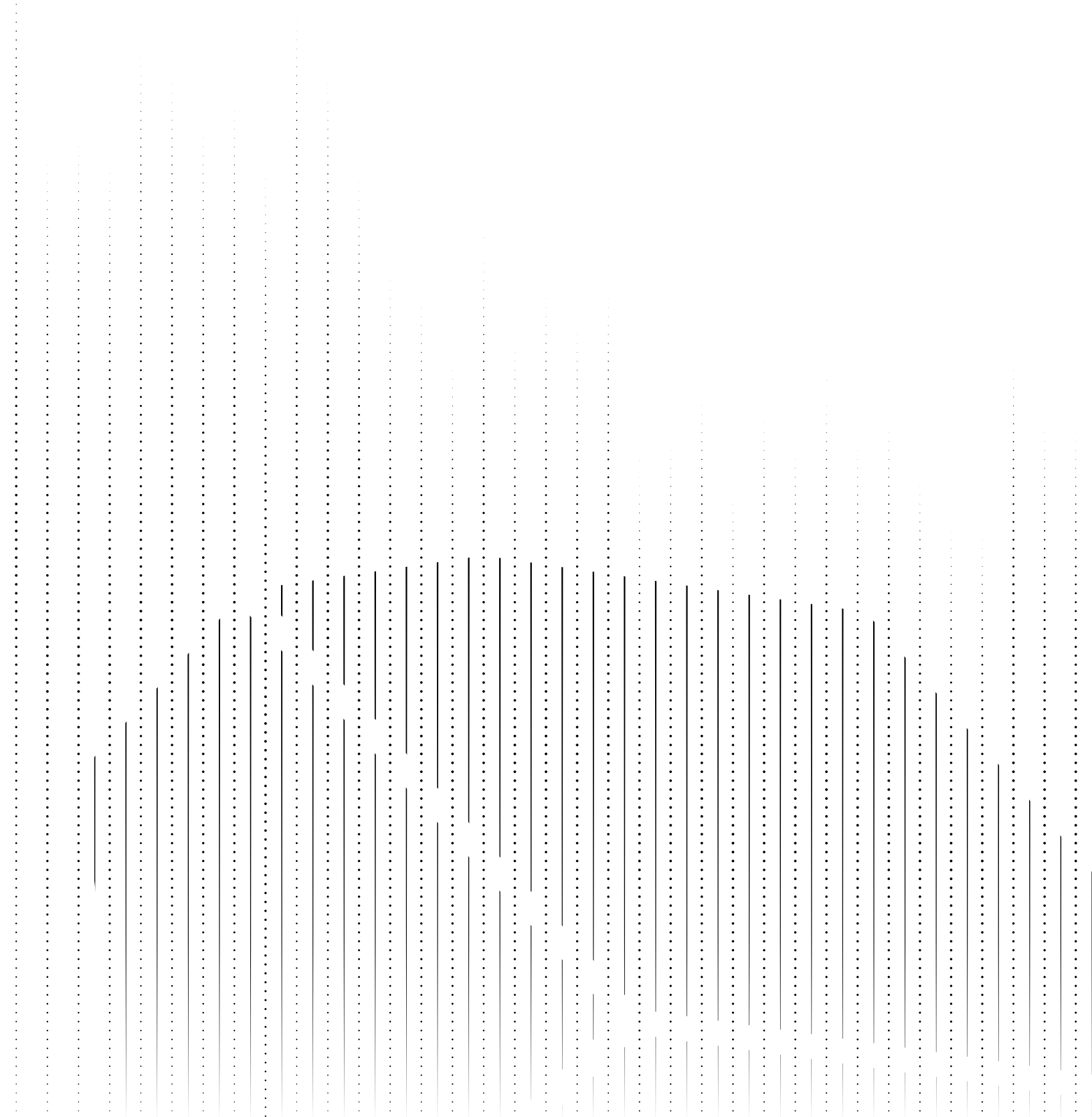
Signs an organization doesn't understand processes



It's interesting to see that Finance and Shared Services leaders don't just see the technical implications of suboptimal processes, like difficulties adopting tech and increasing costs. They also include more personal signs in their top three, like employee retention challenges and inter-departmental tensions. This further reinforces the idea that they are ideally placed to drive process improvement initiatives and consequently create value across the organization.

What's next?

Taking the lead with Process Intelligence



Starting any process improvement initiative with Finance and Shared Services teams makes perfect sense. As the adoption of innovative process optimization solutions continues to increase, these teams will gain full visibility into their end-to-end processes, including how they intersect with other functions.

With that visibility, they can improve productivity, reduce costs, mitigate risk, and grow revenue. Finance and Shared Services teams are in an

enviable position to take a lead in driving the business forward.

Success will rest on using advanced tools like process mining and, ideally, more comprehensive process intelligence technologies.

Departments like yours are already using Celonis Process Intelligence to connect to their processes, connect their teams to each other, and make AI work effectively for the enterprise.

Want to find out more about how Celonis Process Intelligence can benefit your team?

- Take a look at **Process Intelligence 101** to find out what Process Intelligence is and why you should care.
- Discover how you could use Celonis to **power transformation in your department.**
- See how Celonis customers are using our Process Intelligence platform to **improve finance processes.**

You can also read our report, **Making processes work**, to find out what 1,620 business leaders across multiple departments are doing to optimize their processes. And there are additional department-specific editions to explore too.

Read the reports:

- **Operations and Process Improvement Edition**
- **IT Edition**
- **Supply Chain Edition**



Survey sample

The research was conducted by Insight Avenue, an independent, third-party, specialist B2B and technology research consultancy. 1,620 interviews, with around 400 in each of four regions and in each of four departments, were conducted during July and August 2024. Business leaders were interviewed from organizations with revenue of \$500m+ across a range of sectors.

This report uses data from the 400 respondents who selected “Finance / Shared Services” in response to the question, “Which of the following best describes your department in your organization?”

The sample used in this report is made up as follows:

Level of seniority

Board / C-level	8%
VP level	6%
Head of Department / Director	30%
Senior manager	56%

Organization revenue

\$500m - \$2bn	12%
\$2bn - \$10bn	80%
More than \$10bn	8%

Industry sector

Life sciences	2%
Pharma	3%
Oil & gas	9%
Retail	7%
CPG / FMCG	6%
Manufacturing	5%
IT / technology	8%
Automotive	7%
Chemicals	3%
Banking	24%
Insurance	8%
Logistics	6%
Public sector	7%
Utilities	5%

Region

US	25%
Europe (France, Spain, UK)	25%
DACH (Austria, Germany, Switzerland)	25%
APAC (Australia, Japan, South Korea)	25%

Country

Australia	10%
Austria	3%
France	8%
Germany	15%
Japan	8%
South Korea	7%
Spain	5%
Switzerland	7%
UK	12%
US	25%

About Celonis

Celonis makes processes work for people, companies, and the planet. The Celonis Process Intelligence Platform uses industry-leading process mining and AI, and augments it with business context to give customers a living digital twin of their business operation. It's system-agnostic, without bias, and provides everyone with a common language for understanding and improving businesses, and enabling AI to be effective and relevant for the enterprise. Celonis empowers its customers to continuously realize significant value across the top, bottom, and green line.

Celonis is headquartered in Munich, Germany, and New York City, USA, with more than 20 offices worldwide.

Find out more at celonis.com

© 2025 Celonis SE. All rights reserved. Celonis and the Celonis "droplet" logo are trademarks or registered trademarks of Celonis SE in Germany and other jurisdictions. All other product and company names are trademarks or registered trademarks of their respective owners.

