



Chicago Roundtable

Insights from Finance Leaders.

November 2025



Executive Summary

On November 11, 2025, a group of senior finance leaders from across industries gathered in Chicago, IL, for a candid and forward-looking roundtable on the future of finance. The discussion explored how CFOs and their teams are navigating seismic shifts—from AI adoption and data trust to talent shortages, globalization, and evolving workforce structures. With perspectives from banking, insurance, healthcare, construction, manufacturing, technology, and nonprofit sectors, participants shared real-world challenges, innovative solutions, and bold visions for what finance could look like by 2030.

What follows is a synthesis of rich dialogue, organized around the major themes that surfaced during the evening. The direct insights from leaders in the room reflect a shared commitment to becoming strategic, data-driven business drivers empowered by advanced AI and analytics tools.

Global Shifts Reshaping Finance

After pulling together top finance executives from the Chicagoland area, the conversation started with a compelling exploration of the macro shifts transforming the finance function, revealing three dominant themes: **globalization, technological acceleration, and the evolving talent landscape.**



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First, globalization has permanently altered the structure and expectations of finance teams. As organizations increasingly adopt distributed operating models, finance work is being offshored and nearshored to centers in India, Eastern Europe, Ireland, and cost-efficient U.S. hubs like Dallas and Charlotte. This dispersion isn't just about cost; it also reflects access to specialized talent and the need for 24/7 operational agility. Global finance leaders now oversee teams spanning three or more countries. This demands cultural fluency and a rethinking of governance, risk, and compliance strategies across jurisdictions.

Second, the technology stack in finance (and across all enterprise functions for that matter) has evolved beyond recognition. Once anchored in monolithic ERP systems, the modern finance toolkit is increasingly defined by modular, AI-native platforms. Tools like AI-powered dashboards, predictive analytics engines, and autonomous close processes are becoming standard. However, a clear theme from participants was that these tools are only as good as the data that feeds them; clean, reliable, and integrated data remains the gating factor for realizing AI's promised productivity gains.

Finally, talent remains the most contested battlefield. The war for skilled finance professionals is intensifying, not only due to a scarcity of candidates with strong digital fluency and strategic acumen, but also because of shifting generational expectations. Younger talent seeks roles with purpose, flexibility, and pathways for continuous growth. Gen Z finance professionals prioritize “mission-driven work” over the desire for compensation alone. In response, finance leaders are rethinking job design, investing in digital upskilling, and embedding ESG-linked responsibilities to align with evolving motivations.

Responsible AI Adoption: Risk & Governance

Expanding on the theme of speed and governance, the conversation naturally turned to AI, a domain where finance leaders are simultaneously optimistic and cautious. With growing pressure to innovate, organizations are trying to understand how to implement AI without being exposed to undue risk. While the promise of AI lies in innovation, efficiency, scalability, and cost savings, the pace of technological evolution often outstrips internal governance structures, creating a widening gap between capability and control. To navigate this, some executives outlined a framework for responsible AI adoption built around four

pillars: Strategy, to ensure alignment with core business objectives; Systems, emphasizing the importance of clean, interoperable data; Synchronization, which involves preparing people, processes, and culture for AI integration; and Stewardship, maintaining oversight, transparency, and ethical use. Without these foundations, even the most advanced AI tools will not become value drivers.

A quick AI maturity poll in the room revealed a telling snapshot: while most participants rated their organizations' AI maturity as low to moderate, one outlier proudly claimed a 10—unsurprisingly from a leader at a global technology firm where AI is deeply embedded into strategy. For most others, AI adoption remains in the early stages, limited to pilot programs or narrow applications.

In the construction sector, for instance, one executive explained that their current focus is on enabling AI infrastructure; supporting data centers and conducting simulations to test performance before scaling. This reflects a broader trend: while the potential of AI is widely acknowledged, realizing that potential requires disciplined experimentation, cross-functional alignment, and a willingness to rethink traditional approaches to risk and transformation.

One executive from the electronics manufacturing sector shared that their organization is midway on the AI maturity curve, around a "5," but got there quickly by implementing low-barrier, high-impact solutions. For instance, using Copilot in Microsoft Teams to record meetings, extract action items, and clarify decisions has significantly cut down on miscommunication and manual note-taking. Using AI to review contract scripts was another big win that now frees up hours of legal and finance time while reducing errors.

Security and compliance, however, remain top concerns—especially in highly regulated sectors like insurance. One leader explained that adoption accelerated only after Copilot was configured to operate entirely within their internal firewall. Once the IT and compliance teams signed off, resistance dropped and usage spread rapidly.





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AI's ROI

The conversation pivoted to an increasing concern: what's actually delivering measurable return on investment (ROI)? With many organizations still navigating the experimental phase of AI adoption, CFOs are trying to understand what creates real impact. While high-profile use cases—like generative forecasting or autonomous scenario modeling—often dominate headlines, participants largely agreed that the most tangible value today is being generated through modest, targeted applications. These include intelligent automation of routine tasks, enhanced reporting workflows, and AI-driven document parsing—solutions that quietly reduce manual effort and unlock valuable time for strategic work.

Crucially, leaders emphasized that realizing ROI isn't just a matter of deploying the right tools—it's about orchestrating the right collaborations. One nonprofit finance executive captured this well, noting that success with AI stems less from technical brilliance and more from organizational alignment. "You can't automate in silos," he said, pointing to the essential partnership between IT, compliance, and operational leaders. Cross-functional trust and shared accountability were repeatedly cited as critical enablers of sustainable transformation.

Moreover, the conversation reinforced the value of a disciplined, phased approach: start small, validate impact, then scale. This "crawl, walk, run" methodology not only builds internal credibility but also mitigates risk and accelerates cultural adoption. In an environment where skepticism can easily stall progress, early



wins—however modest—play an outsized role in building enterprise-wide momentum. Ultimately, the consensus was clear: the finance teams seeing the greatest gains are those focusing not just on AI’s promise but on its practical, incremental contributions to enterprise value.

Data Confidence: A Shared Weak Link

As the conversation turned to the foundational issue of data quality, a sobering reality emerged: most CFOs simply do not trust the data that underpins their decisions. According to a [2025 RGP survey](#), only 19% of finance leaders report high confidence in the quality of their organization’s data, and just 27% say they rely on it consistently to drive strategic decisions. This credibility gap poses a critical obstacle to AI adoption—because no matter how advanced the model, its outputs are only as trustworthy as its inputs. As one participant put it, “If you don’t trust your data, AI will give you confidently wrong answers.”

This insight aligns with broader industry research. A [2023 Gartner report](#) found that poor data quality costs organizations an average of \$12.9 million per year, largely due to wasted operational time, compliance risks, and missed insights.

Participants agreed that data governance, standardization, and process discipline are no longer technical chores relegated to IT—they are strategic imperatives, foundational to AI readiness. In the pharmaceutical industry, one executive described the persistent challenge of integrating prescription and patient-level data sourced from third-party providers and disparate EMR systems. Wrangling this data in a way that is secure, HIPPA-compliant, and analytically usable requires not only robust infrastructure but deep collaboration across legal, data science, and clinical teams.

In the senior care sector, another leader recalled the operational chaos created by a financial restructuring that left the organization juggling nine different accounting systems across multiple counterparties. What followed was a months-long effort to normalize charts of accounts, align treatment classifications, and standardize reporting conventions—an effort that highlighted just how fragmented and fragile data becomes in the absence of centralized oversight.

These lived experiences underscore a critical takeaway: AI success is about the systems, standards, and stewardship that ensure data is not just collected, but curated and trusted. Until that trust is institutionalized, efforts to scale AI will remain stalled at the proof-of-concept stage.

Talent, Skills & Developing the Workforce of Tomorrow

A critical topic that wove through every prior theme: talent. As automation and AI reshape finance, so too must the roles, skills, and mindsets of the people behind the numbers. The talent shortage isn't just about headcount; it's about evolving expectations and equipping teams for a new era of value creation. Today's younger professionals aren't motivated by superficial perks; they're seeking purpose, impact, and growth. Automation isn't a threat to this; it's an enabler. By removing repetitive work, AI allows teams to focus on strategic thinking, storytelling with data, and driving business outcomes.

Yet this transition isn't seamless. In several industries, including technology and insurance, leaders reported workforce imbalances—teams with deep experience but not enough early-career talent to carry the torch forward. This has sparked a renewed focus on building pipelines of younger professionals, upskilling them not only in accounting and finance but in data science, automation tools, and AI literacy. One executive noted that with a large portion of CPAs nearing retirement, their firm is proactively hiring IT and analytics talent within finance teams to future-proof their operations.



Others emphasized the changing nature of entry-level roles. In nonprofit and healthcare sectors, for instance, the next generation of finance staff won't be inputting data; they'll be interpreting it, validating AI outputs, and generating insights. This requires a shift in training, expectations, and leadership support. As one participant observed, it mirrors past transitions—like the move from paper ledgers to spreadsheets—but with far greater speed and complexity. The mission of finance remains the same, but the skill sets required are evolving rapidly. Preparing for that future isn't optional; it's existential.

As hybrid work models mature, companies are shaping their approach based on operational demands and organizational culture. A leader from the construction industry shared that their team remains fully onsite, five days a week, to maintain cohesion and manage complex systems effectively. Meanwhile, a participant from a global technology firm explained how internal AI tools have helped reduce manual HR tasks by more than 50%, making remote work more scalable.

The Future of Finance: Automation, Ownership & Strategy

As the discussion wrapped, the group reflected on a forward-looking question: if you could redesign your finance function for 2030, what would you automate, keep, or outsource? The consensus was clear — AI and automation come first. One participant remarked, "Why let others profit off your efficiency gains when you can capture them internally?" The future of finance lies in strategic automation that builds internal capability.



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This sentiment was echoed by leaders across industries. At a major bank, internal innovation challenges are driving transformation from within. Teams are empowered to pitch and implement AI solutions, with one recent example centralizing strategic initiative data and automating the intake process; a clear sign of how AI is reshaping not just operations but decision-making infrastructure. In manufacturing, another leader cautioned against the unintended consequences of outsourcing, drawing from past experience where outsourcing production also meant training future competitors. For him, investing in AI is not just a matter of efficiency but of protecting long-term strategic advantage.

The tone of the evening was one of both realism and optimism. Finance leaders recognize that automation, AI, and data governance are no longer optional; they're foundational. But they also see opportunity: to elevate their teams, reshape roles, and drive innovation from within. As the moderator brought the discussion to a close, it became clear that this wasn't just a conversation about the future of finance—it was a blueprint for how modern business must evolve.

Speed is the currency of credibility

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