

2025 Finance Trends

7 Finance Trends to Consider for 2025

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The Association of
Accountants and
Financial Professionals
in Business



 avidxchange

Featured Presenters



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Today's Agenda

Agenda

- 01 Key Takeaways from AvidXchange's 2025 Trends Survey
- 02 Top Priorities and Challenges for Finance Departments
- 03 2025 Finance Trends
- 04 AP Automation with AvidXchange
- 05 Q&A

Key Takeaways

Key Takeaways

AvidXchange's 2025 Trends Survey

We surveyed 500 finance leaders across middle market companies in August 2024

The survey unveiled seven areas of focus for finance leaders as we move into the new year:

- 01 Understanding the return on investment (ROI) of artificial intelligence (AI)
- 02 Remaining vigilant against financial fraudsters
- 03 Developing new skills as the finance function evolves
- 04 Evaluating finance and accounting tech stacks
- 05 Adopting new electronic payment methods
- 06 Finding efficiencies through automation
- 07 Nurturing strategic partnerships with suppliers

Key Insights

Top Priority

Creating operational efficiencies is the top priority for **61%** of finance departments moving into the new year.

AI ROI

71% are concerned about measuring ROI from AI technology.

ePayment Popularity

86% of finance departments are adopting ePayment methods, including digital wallets and mobile payment platforms.



Key Insights



Finance Function Evolution

87% of survey respondents report they were tasked with new responsibilities like overseeing data analytics and tech integrations in 2024.

Biggest Concern

Security, including fraud and phishing attempts, is the biggest concern for **52%** of finance departments as they prepare for 2025.

Poll #1

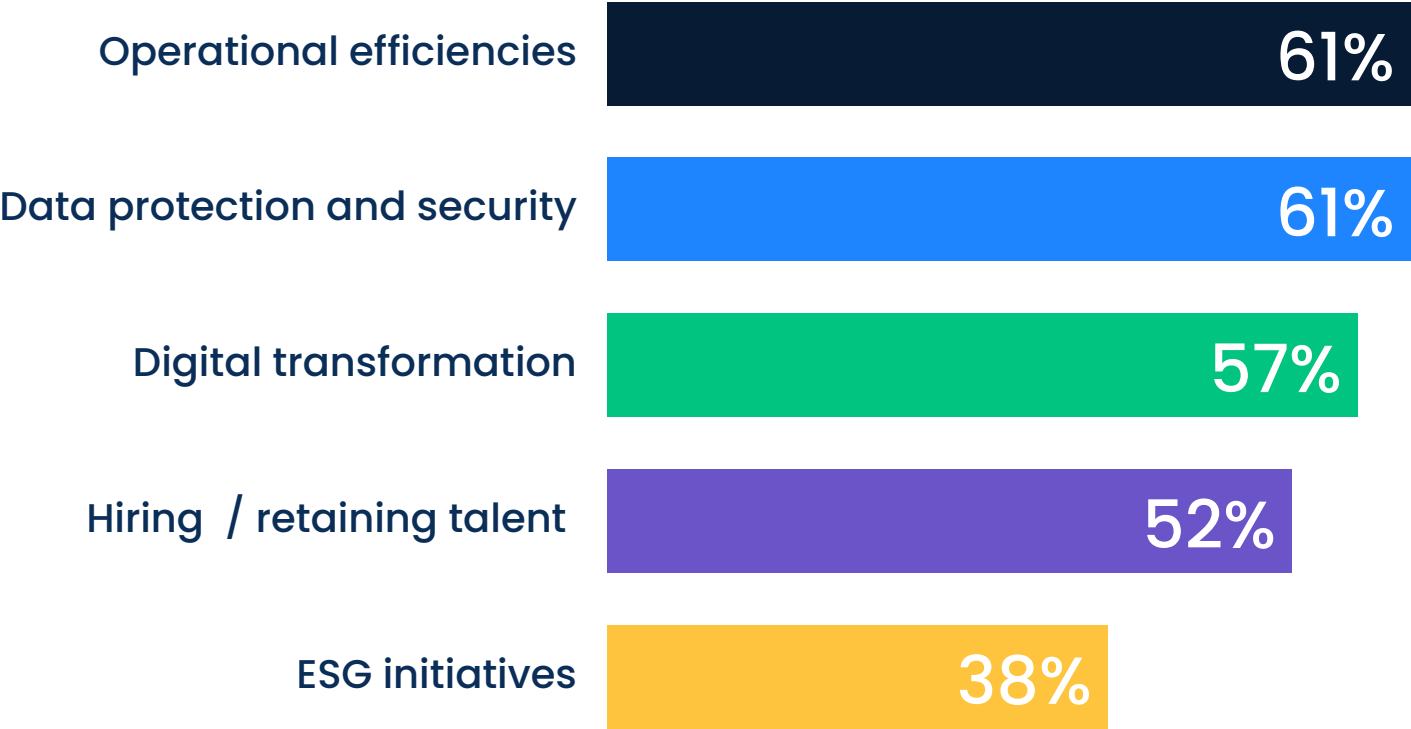
What is your finance department's top priority for 2025?

- A. Attracting, hiring and retaining talent
- B. Creating operational efficiencies
- C. Data protection, security and regulatory compliance
- D. Environmental Social Governance (ESG) initiatives

Top Priorities and Challenges

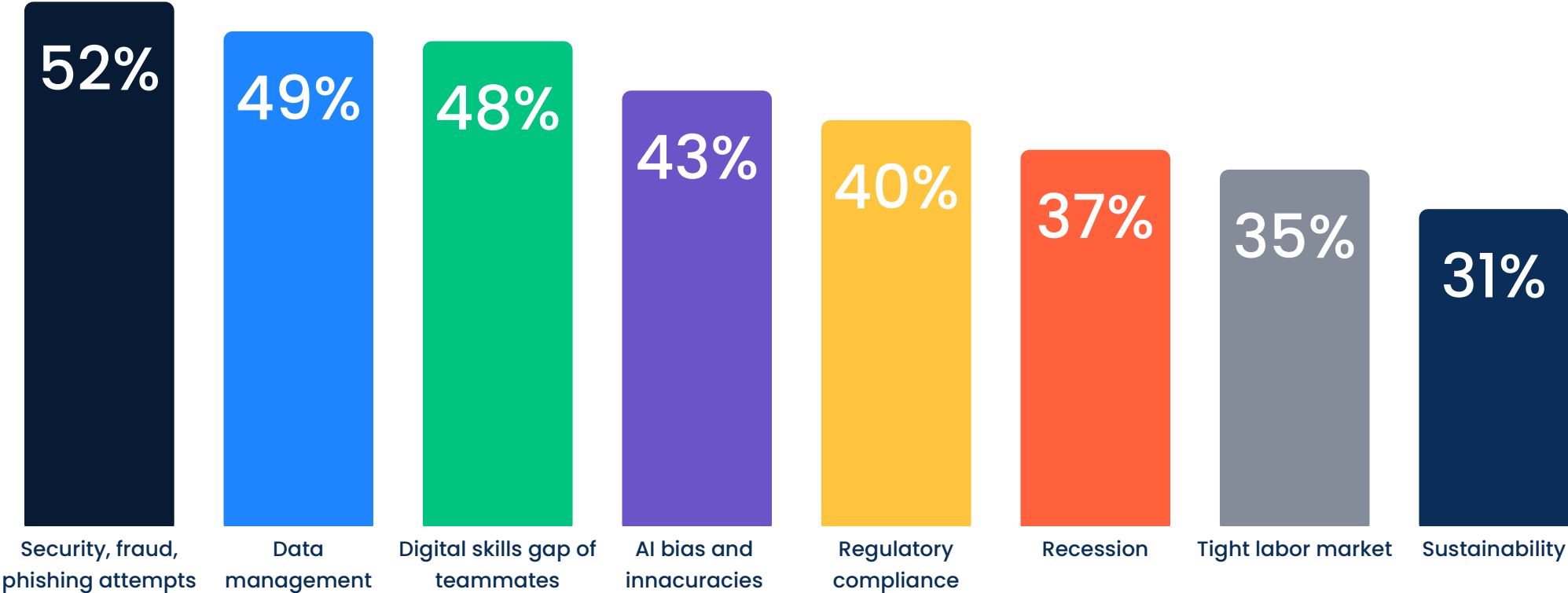
Top Priorities for Finance Departments

As we head into an unpredictable 2025, finance leaders are reassessing their technology investments, strengthening security measures, and exploring new operational strategies as their roles continue to expand and evolve.



Top Concerns for Finance Departments

While the future is unpredictable, keeping on top of industry shifts will help finance pros adapt no matter what 2025 holds.



Poll #2

Looking to 2025, what is your finance department's biggest concern?

- A. Recession or tight labor market
- B. Security, fraud, and phishing attempts
- C. Data management or regulatory compliance
- D. Bias and inaccuracies in AI
- E. Sustainability

2025 Finance Trends

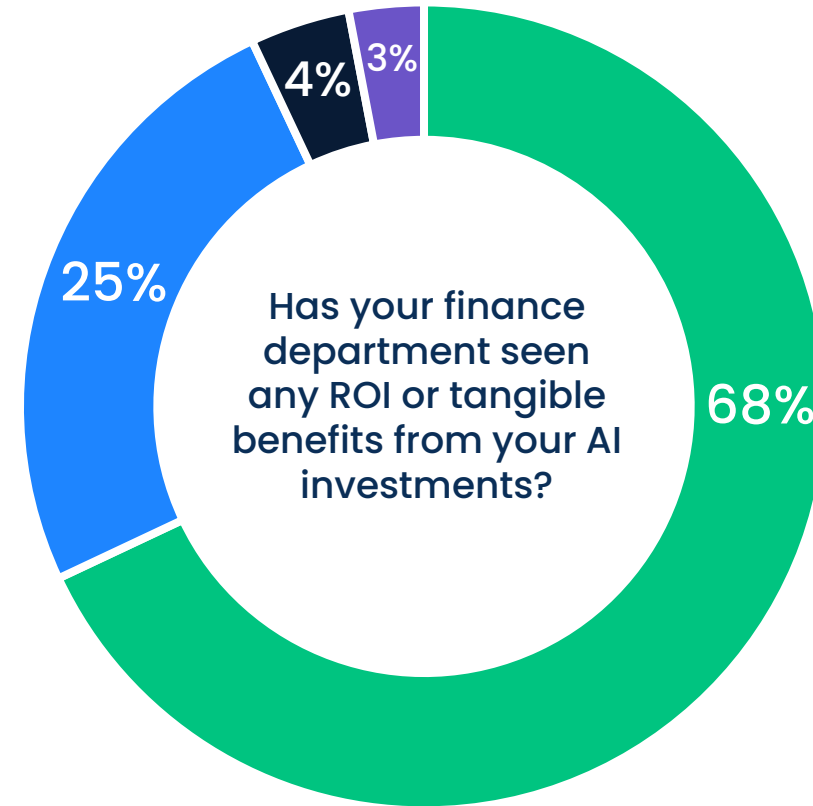
1. Finance Pros Embrace AI, Evaluate ROI

65%

of finance leaders report
currently using AI
technology in their
department

1. Finance Pros Embrace AI, Evaluate ROI

- › A recent [McKinsey](#) report summarized by [CFO Dive](#) reported that most companies are not yet realizing significant earnings gains from their AI investments.
- › While the vast majority (76%) see value in using AI within their finance department, 71% noted they are concerned about measuring the ROI of their AI tools.

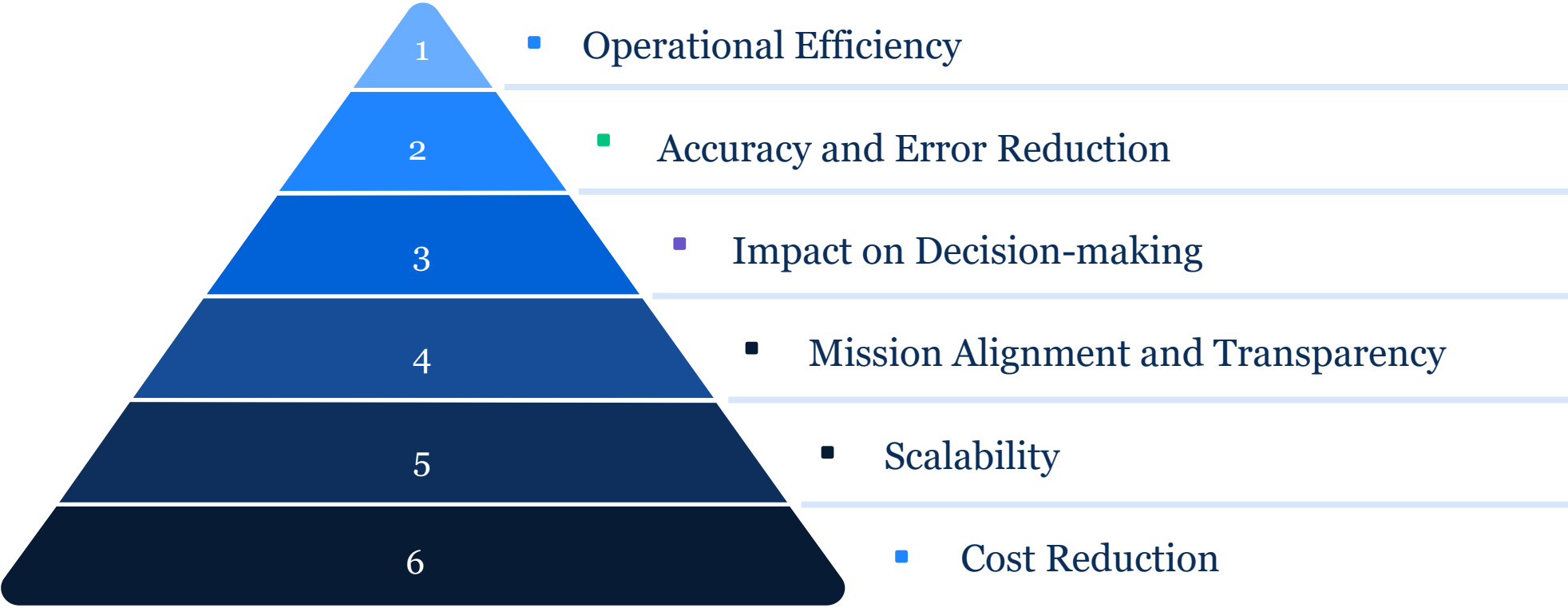


- Yes, significant ROI and benefits
- Yes, moderate ROI and benefits
- Yes, minimal ROI and benefits
- No, no noticeable ROI or benefits

Sources:

- AvidXchange 2025 Trends Survey, August 2024
- www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai
- www.cfodive.com/news/companies-report-solid-ebit-gains-rush-gen-ai-mckinsey-generative-technology-artificial-intelligence/718516/

How Do We Measure the Success of AI in Finance?



2. Security Remains a Top Concern

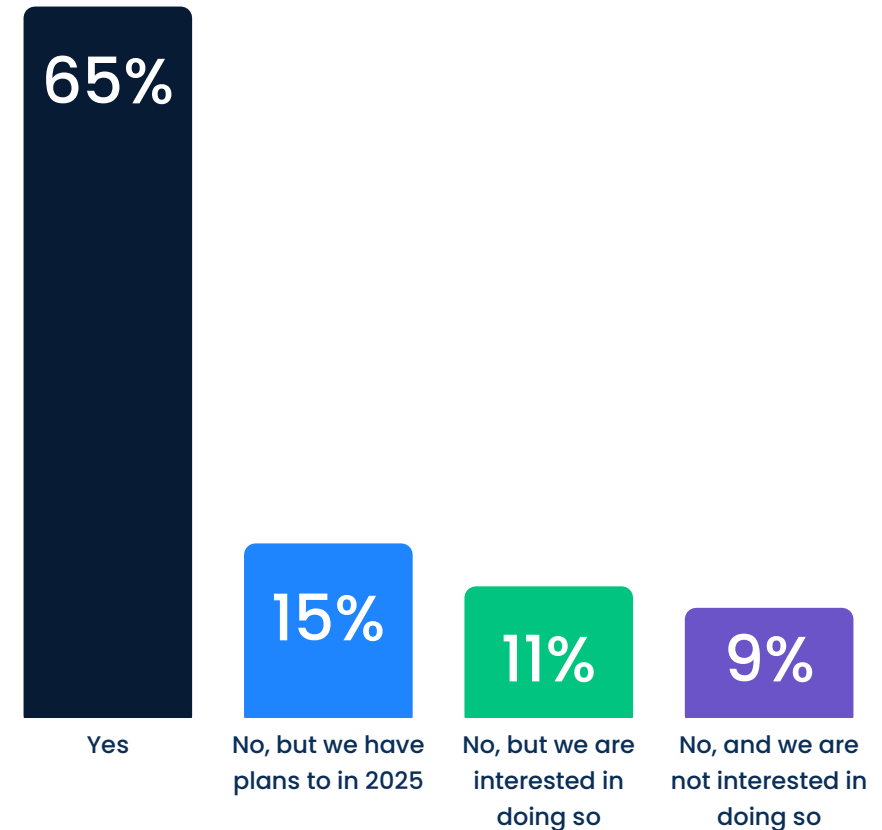
Only 10% Said they did not experience
check fraud attacks or attempts
in 2024

2. Security Remains a Top Concern

Moving into 2025, finance departments should remain vigilant as cyberattacks grow increasingly sophisticated.

- › **30%** said risk management mitigation is now part of their job description.
- › **61%** said deep fakes or impersonations impacted their finance departments in 2024.

Has your organization strengthened its security measures in 2024?



3. The Finance Function Evolves

87%

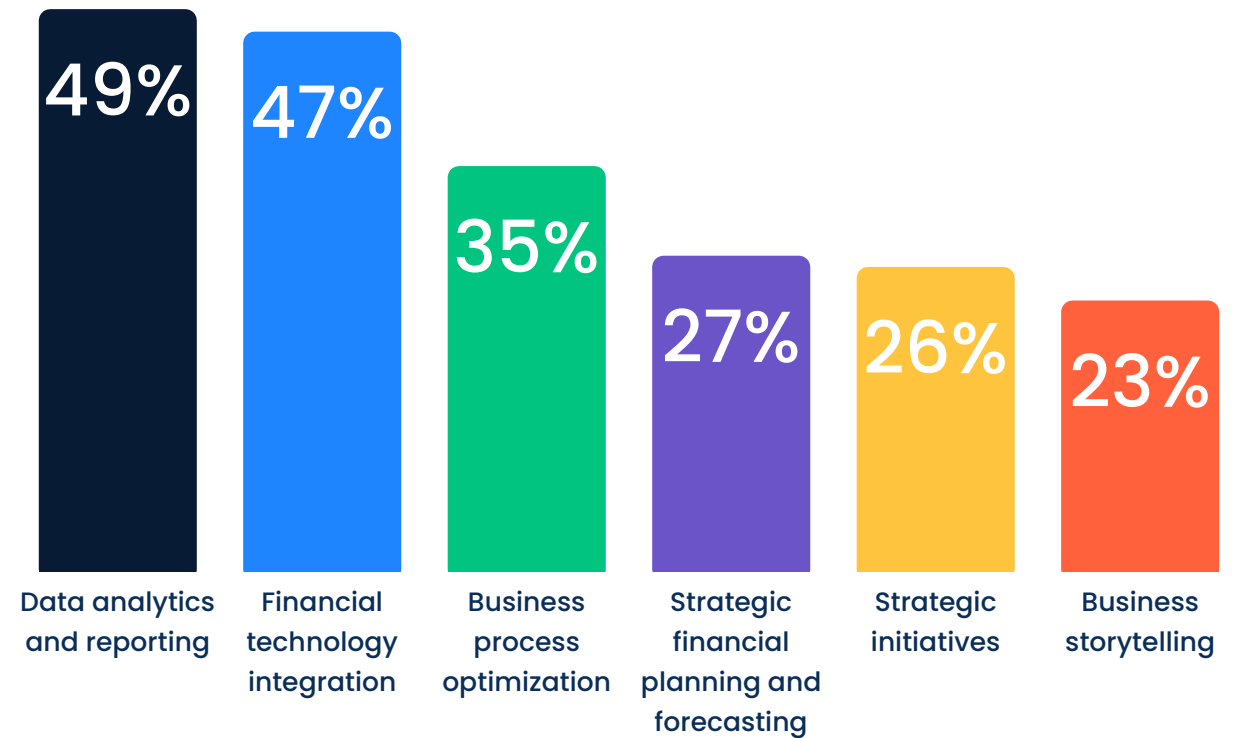
of finance leaders were
tasked with new
responsibilities in 2024

3. The Finance Function Evolves

Traditional finance and accounting roles are shifting due to various factors including the ongoing talent shortage and demand for digital skills.

- › More than **3 out of 4** finance departments said they have invested in AI and automation to address staffing challenges in 2024.

What responsibilities are you tasked with in 2024 that you weren't tasked with two years ago?



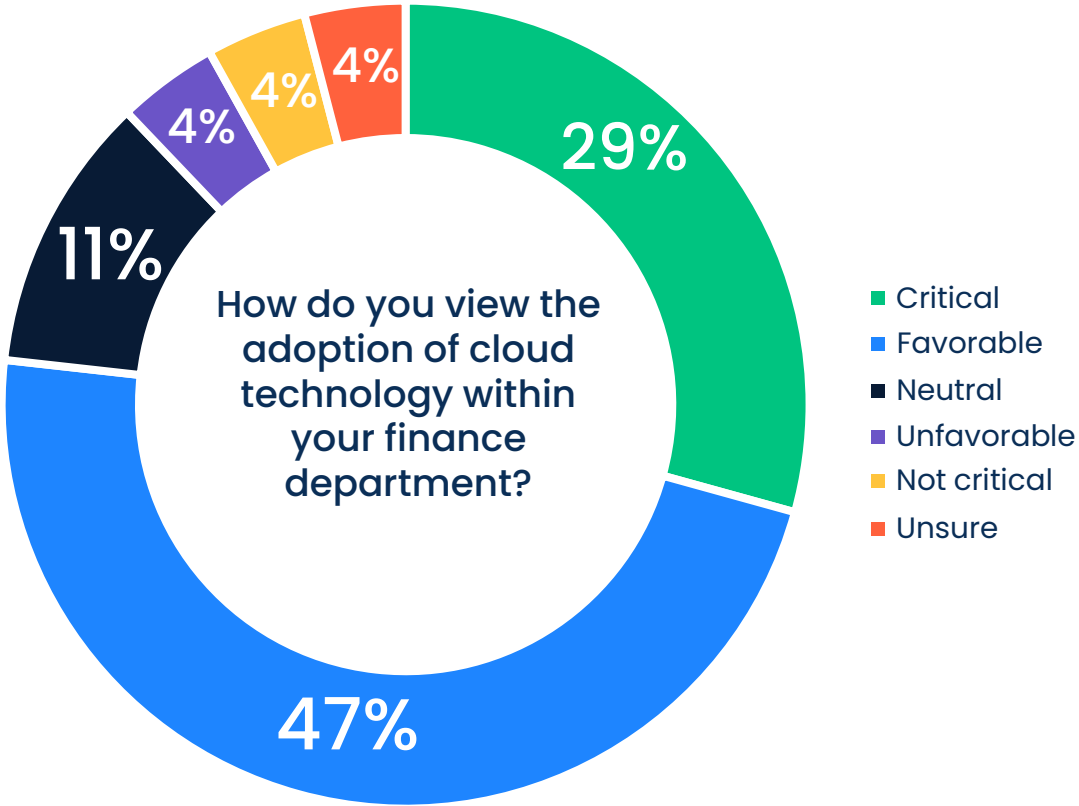
4. Tech Stacks Consolidate, Cloud Adoption Expands

Only 4%

of respondents said none of their finance work is currently conducted in cloud-based technologies

4. Tech Stacks Consolidate, Cloud Adoption Expands

Finance leaders are evaluating and consolidating their tech stacks with integrations that centralize their processes with all the information they need in one place.



Poll #3

How much of your finance work is currently conducted in cloud-based technologies?

- A. All of it
- B. Most of it
- C. About half of it
- D. Some of it
- E. None of it

5. Electronic Payment Adoption Grows

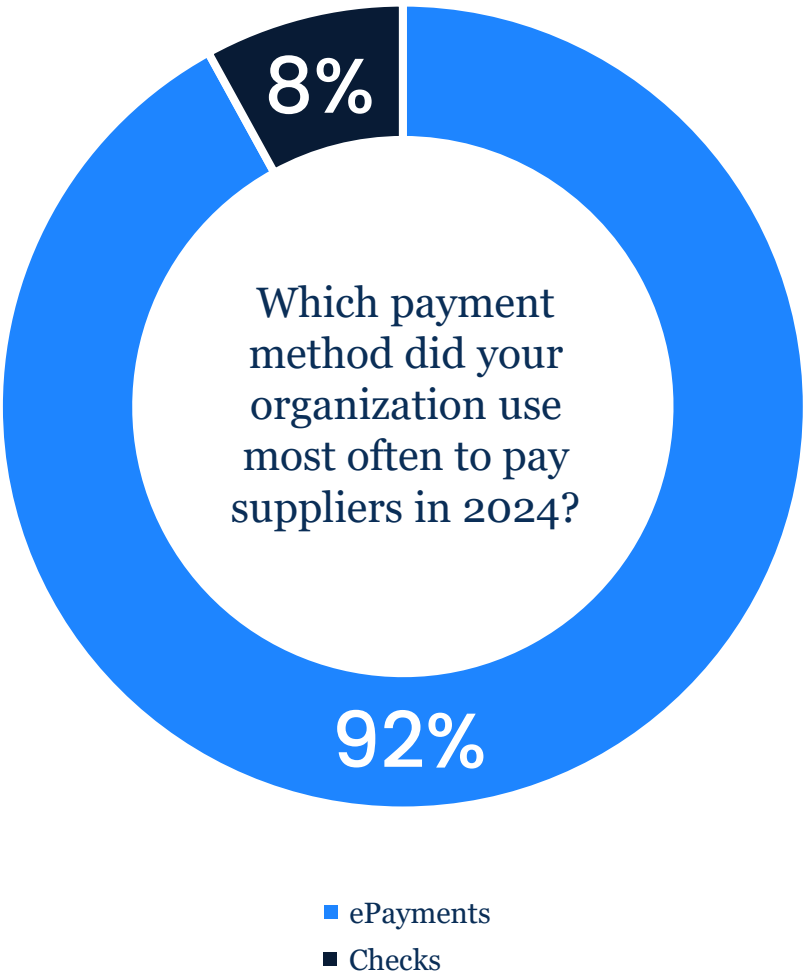
About
3 out of 4

finance teams have seen
an increase in requests
from suppliers for real-
time payments in 2024

5. Electronic Payment Adoption Grows

Our Trends Survey found that the percentage of businesses using mobile payment platforms most often to pay suppliers **nearly doubled** to 15% in 2024 compared to 8% in 2023.

- › The majority of businesses (61%) either exclusively or mostly use ePayments like virtual credit cards or bank transfers for financial transactions.



6. Finance Leaders Recognize Automation Advantages

55%

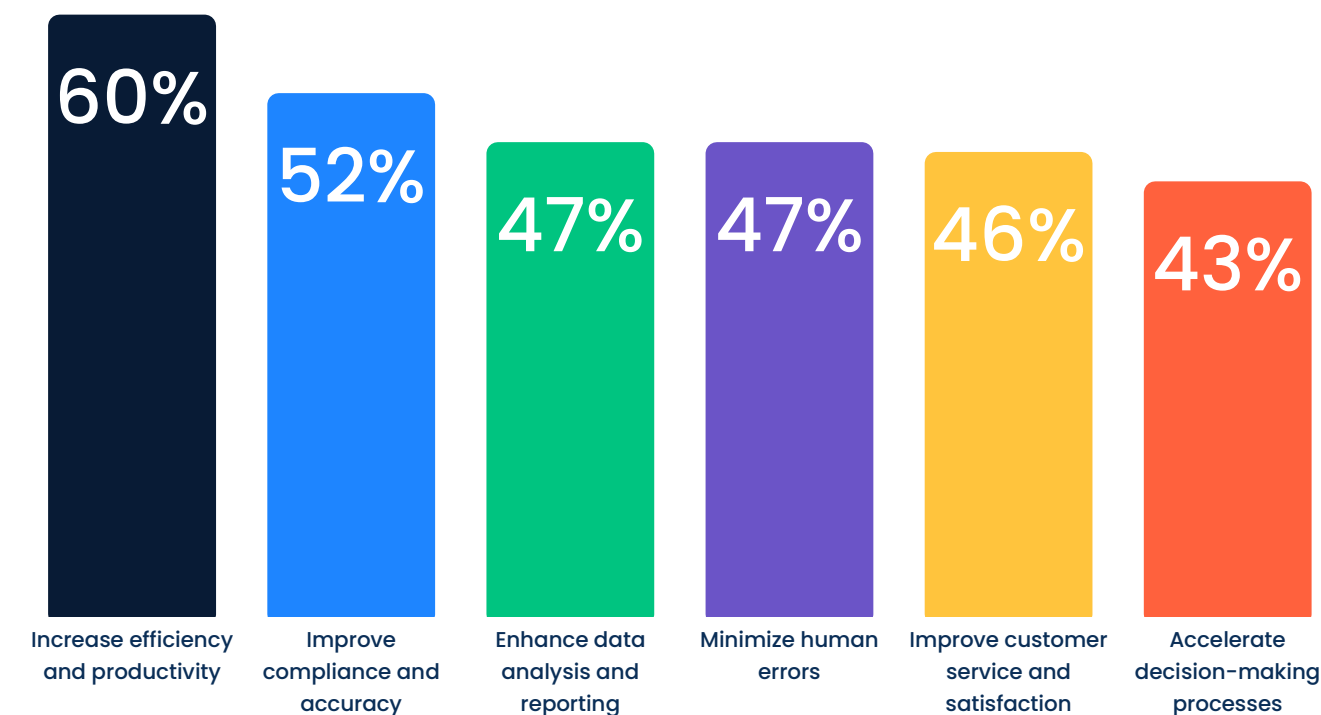
of finance leaders say
automating workflows in the
finance department is a high
priority

6. Finance Leaders Recognize Automation Advantages

64% of organizations are currently using finance automation technology.

- › An additional 17% plan to implement automation tools in 2025.

Why would your organization use automation in your finance department?



7. Supplier Relationships are Paramount

64%

of finance leaders would consider adopting payment automation software or switching providers to gain access to a supplier hub

7. Supplier Relationships are Paramount

Many businesses are realizing the advantages of collaborating with suppliers, including opportunities for discounts and strategic partnerships that ultimately impact the bottom line.

- › 37% of finance leaders feel that their organization is very effective at collaborating with suppliers to enhance financial processes.



- Yes, it's a key part of our strategy
- Yes, it's somewhat included in our strategy
- No, but we are considering it
- No, it's not part of our strategy
- Unsure

Poll #4

Would you consider switching your payment automation software or adopting payment automation software to gain access to a supplier hub?

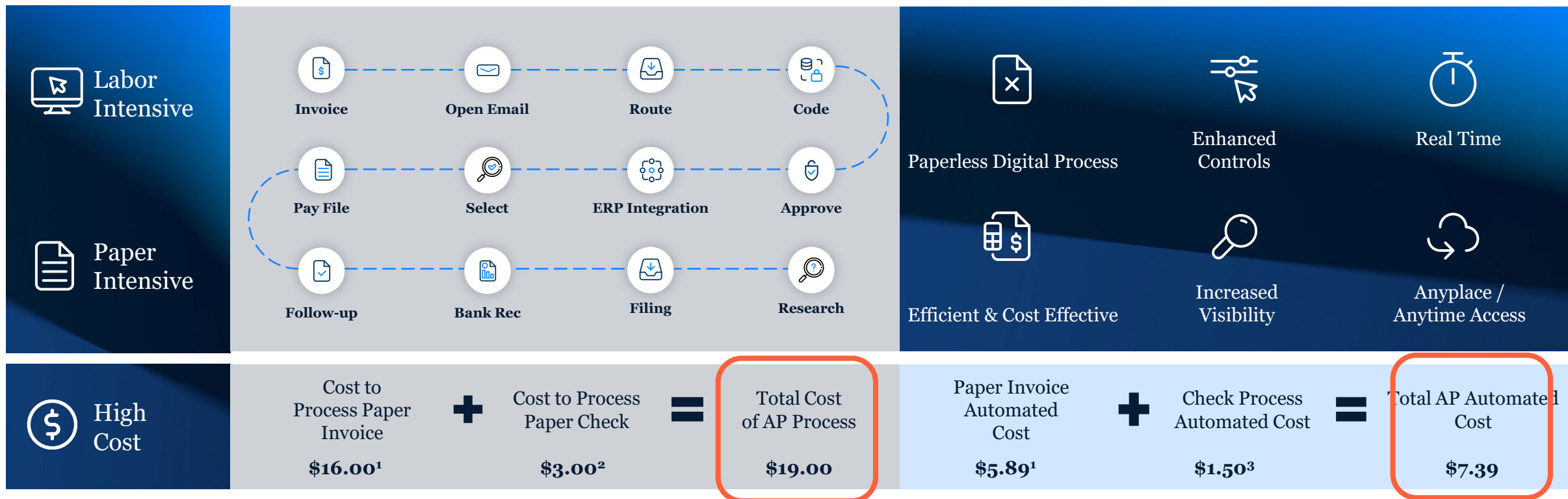
1. Yes
2. No

AP Automation with AvidXchange

Traditional Workflows Are Manual, Slow, And Expensive

BEFORE AUTOMATION

AFTER AUTOMATION



\$12 Estimated Savings
Per Transaction

How We Serve Both Our Buyer and Supplier Customers



Buyer

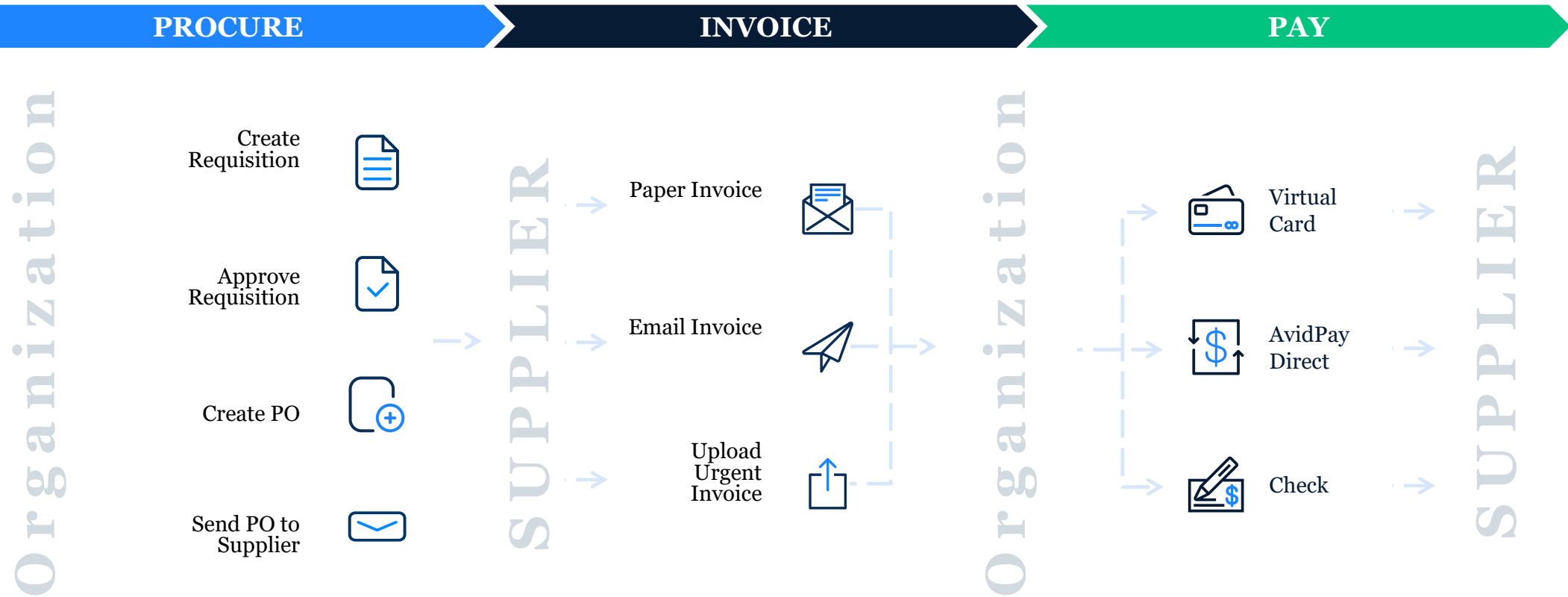
- > Improve and Control Spend
- > Eliminate Paper Processes
- > Reduce Manual Data Entry & Fraud
- > Increase Visibility
- > Manage Suppliers
- > Audit / Regulatory Trails



Supplier

- > Invoice Reconciliation
- > Remove Costly Frictions
- > Send Invoices Electronically
- > Decrease Data Entry
- > Improve Cash Forecasting
- > Provide Working Capital

Full AP Automation Through AvidXchange



Automate and Match Purchase Orders

More PO visibility and control. Less hassle.



Encumbrance Tracking



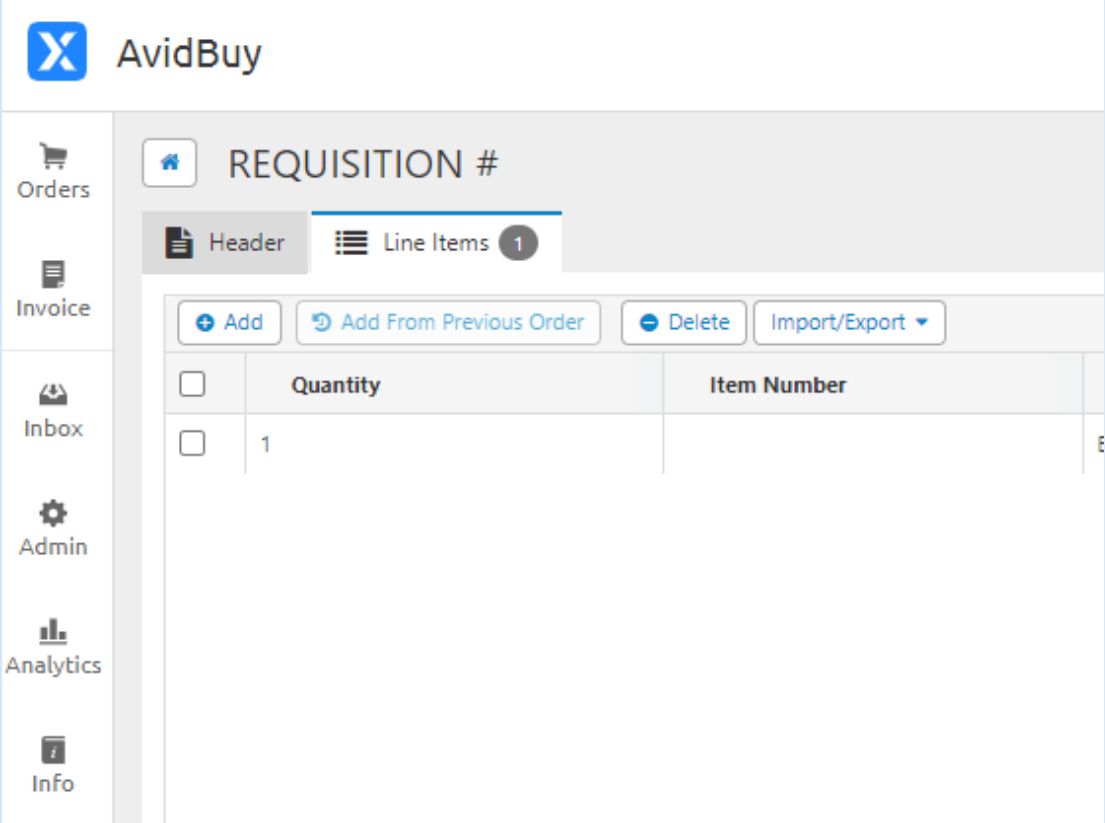
BI Budget Dashboards



Visual indicators of invoice approval



2-and 3-way PO matching



Streamline Your Entire Invoice Process

Eliminate risk-prone, inefficient invoice processes.



Review and approve invoices on a cloud-based platform allowing for 24/7 real time access



Reduce the hard costs of dealing with paper invoices and payments



AI and Machine Learning with professional indexing services achieves 99.2% accuracy



Custom workflows to accommodate your desired approval process

Orders

Invoice

Inbox

Admin

Analytics

Info

INVOICE # 042924

Header

INVOICE #042924

INVOICE TOTAL800.00

MATCH POLICY3 Way Matching

MATCH STATUSORDER LINESRECEIPT

INVOICE DATE04/29/2024




INVOICE POSTING DATE04/29/2024

INVOICE DUE DATE05/29/2024

SUPPLIERBrana Yoga Flow Store (2022)

Facilite Automated Vendor Payments

Create stronger supplier relationships and vastly reduce fraud risk.

-  Suppliers paid on time with the payment method they prefer
-  Suppliers are supported by a full-service team
-  Organization benefits from fraud monitoring tools like Positive Pay and risk scoring to flag suspicious activity, while systems are monitored 24/7/365 for cyber threats

X AvidPay				
<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Batches		Approvals	Manage Workflows
	Batch ID	Date	Status	
	pps-596	08/30/23	Processing	
	pps-508	08/30/23	Cleared	
	pps-575	08/30/23	Cleared	
	Bank Account		Check Number	Status
	Ops Account		7010563	Cleared
	Payment Detail			
	Mastercard			

Poll #5

Would you like to hear from AvidXchange? (Your 'Yes' response indicates consent to contact from AvidXchange, overriding any previous opt-out selections)

1. Yes, I would like to schedule a demo for a \$100 egift card.
2. Yes, please send me more information.
3. Yes, but I'm not the right person at the organization.
4. Yes, but it's not the right time. Check back in in a few months.
5. No, I am just here to learn.

Question & Answers



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Thank you!

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<https://www.avidxchange.com/>



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