# Top 3 Ways **Finance** Teams Turn Document Work into Impact

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# Today's speakers

**Lisa Fraser**
Content Strategist
Adobe

**Joe Santiago**
Senior Acrobat Evangelist
Adobe

**Lori DeFurio**
Principal Solutions Technologist
Adobe

**Milana Gilo**
Senior Manager of Business Process Optimization at Adobe

**Michael Slayday**
Senior Director of Business Process Optimization

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# Agenda

1. AI and document workflows
2. Finance teams and top use cases
3. Adobe customer zero: Finance

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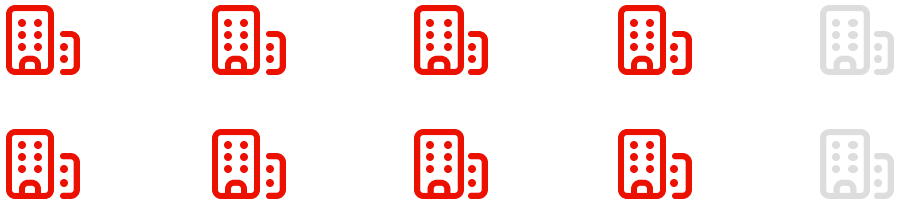
# If AI doesn't get embedded into core business workflows, the value doesn't scale

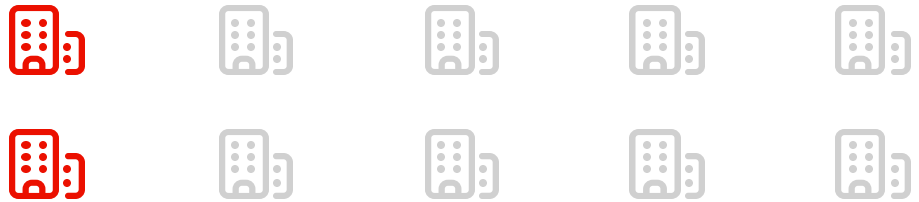
## Everyone is using AI

**8/10** have deployed AI in some form[1]



## Business value is elusive

Only **2/10** report significant bottom-line impact[2]



1 "Seizing the Agentic AI Advantage," McKinsey & Company, June 2025 | 2 "The State of AI: How Organizations are Rewiring to Capture Value," McKinsey & Company, March 2025

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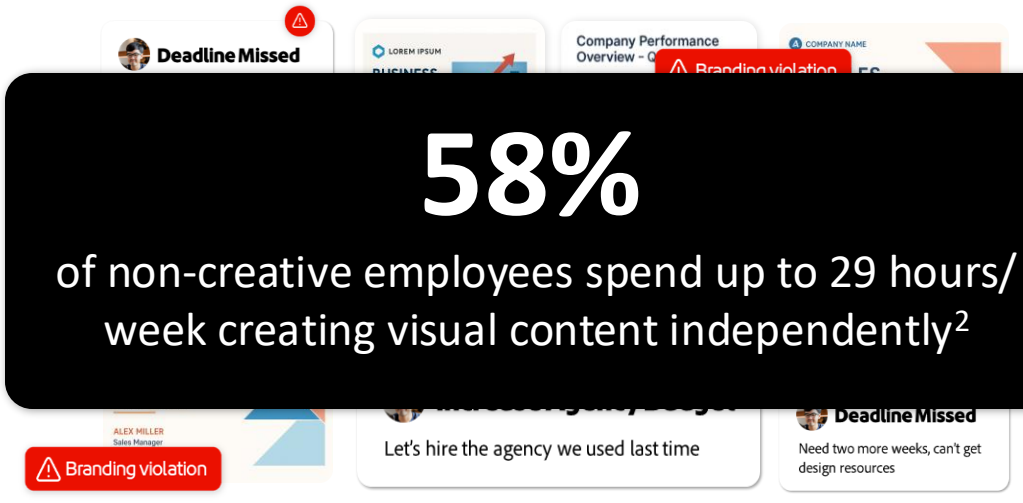
# Turning insights into actions is hard.

## Vast amounts of unstructured information

**40%**

productivity loss among business professionals due to content sprawl and cognitive overload[1]

## Communication often misses the mark




**58%**

of non-creative employees spend up to 29 hours/ week creating visual content independently[2]

## Constant context switching slows work and outcomes

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1 "Maximize Curiosity Velocity to Improve Your Data Culture," Forrester, March 2023 | 2 "The Creative Multiplier," Adobe, July 2025

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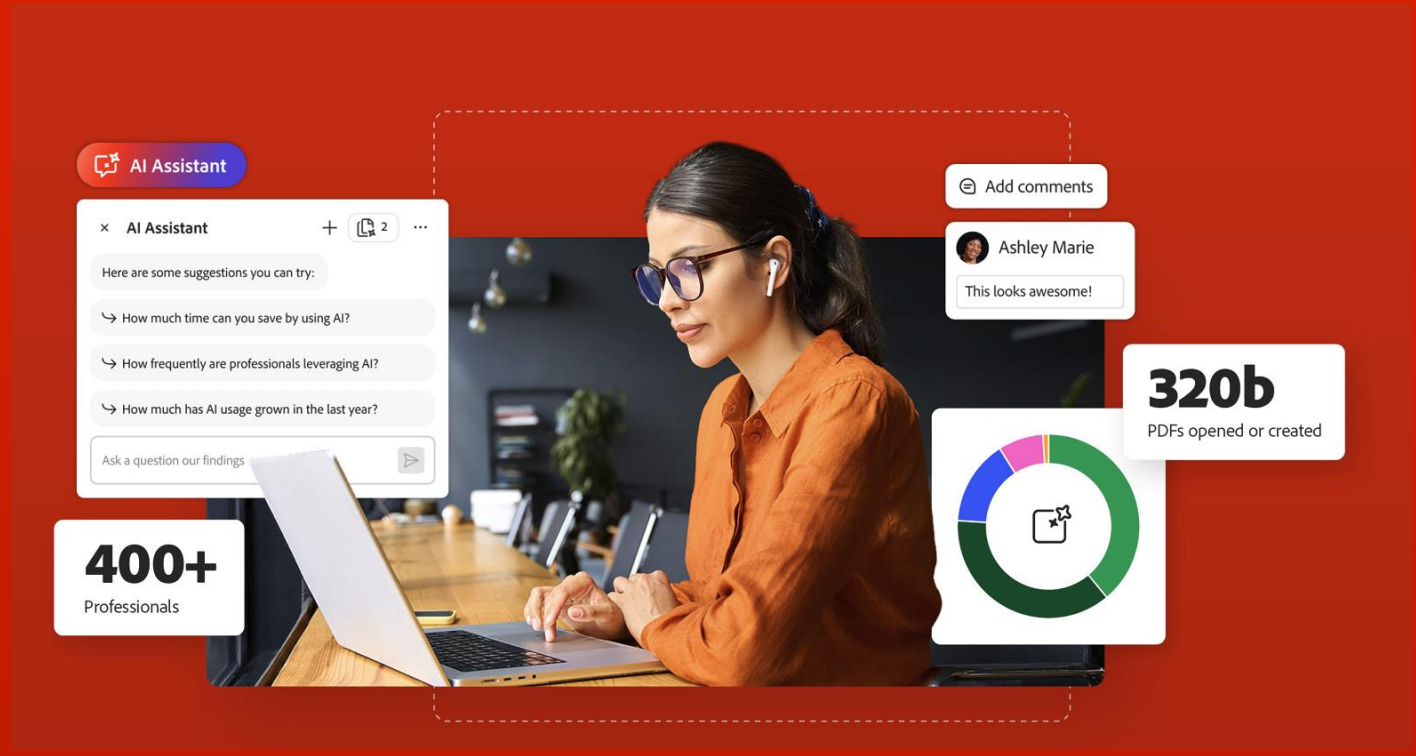
# State of AI in documents:

## Use surges 371% as AI transforms how we work[1]




1 "State of AI in Documents: Use Surges 371% as AI Transforms How We Work," Adobe Digital Insights, January 2026

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# Top challenges of finance teams

## Comprehension

Finance teams struggle to analyze scattered data, summarize reports, and spot anomalies quickly.

## Collaboration

Fragmented collaboration makes it difficult to align stakeholders on budgets, forecasts, and compliance materials.

## Creation

Finance teams need to turn insights into accurate, audit-ready, and shareable financial reports and presentations.

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# Introducing Adobe Acrobat Studio

**Industry-standard productivity & creativity tools — all-in-one, AI-powered platform for PDF editing, comprehension, collaboration, and creation**

Acrobat Pro + AI Assistant + PDF Spaces + Adobe Express

Adobe's trusted security, safe AI, and integrated workflows

Legal

Finance

HR

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# Adobe brings insights and actions together in one integrated solution.

## Control critical information with PDFs

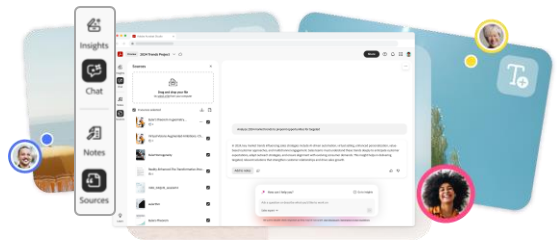
Edit, redact, convert, protect, export, and more — now with conversational AI

### Comprehend

Trusted AI insights and summaries— backed by source-linked citations, plus AI-generated podcasts

### Collaborate

**Unites documents, context, and feedback** in one AI-powered workspace




### Create

High-impact content across formats that's on-brand, self-served, and scalable — powered by AI, templates, and assets

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# Solutions for finance teams

## Comprehension

AI quickly summarizes reports, surfaces anomalies, and extracts key metrics for better decisions.

## Collaboration

PDF Spaces centralize financial documents for secure collaboration and stakeholder alignment.

## Creation

AI-powered tools turn insights into polished, audit-ready reports with secure sharing and traceability.

**Creating a financial brief:**
**2+ hours → around 40 minutes[1]**
**ROI = up to 415% for an enterprise[2]**

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1 "Adobe Acrobat AI Assistant: Transforming How Knowledge Workers Interact with Documents," Pfeiffer, 2024
2 "New Technology: The Projected Total Economic Impact of Adobe Acrobat AI Assistant," Forrester, January 2025

# You are in control of your data.

1. **Customer data is not used to train language models.**
2. **Acrobat AI Assistant and PDF Spaces only look at the documents you tell it to.**
3. **Customer has controls and discretion to enable and disable storing chat history & documents in the cloud.***
4. **Responses with verifiable citations to specific points in the source documents.**
5. **Enterprise controls to manage who has AI access in the company.****
6. **Easy to deploy across the enterprise.****

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# Top 3 use cases for Finance

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Use case #1

# Financial reporting

# Accelerating discovery and insights: Key needs

1. Summarize complex financial reports
2. Identify anomalies and risks
3. Extract critical metrics and disclosures
4. Attributions within results

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# [DEMO placeholder Financial reporting]



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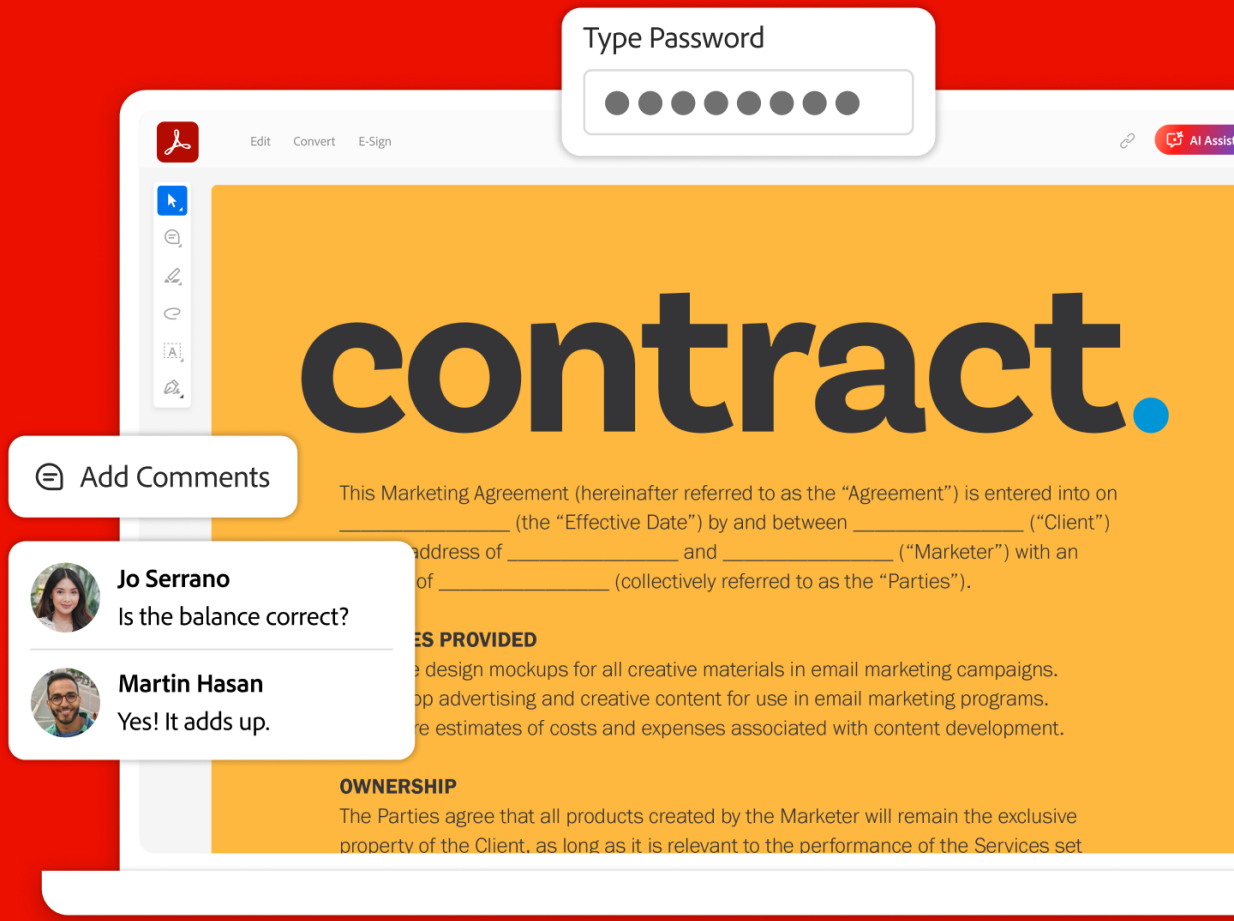
Use case #2

# Collaboration

# Collaboration productivity: Key needs

1. Centralized document management
2. Alignment across stakeholders
3. Secure collaboration

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# [DEMO placeholder Collab]



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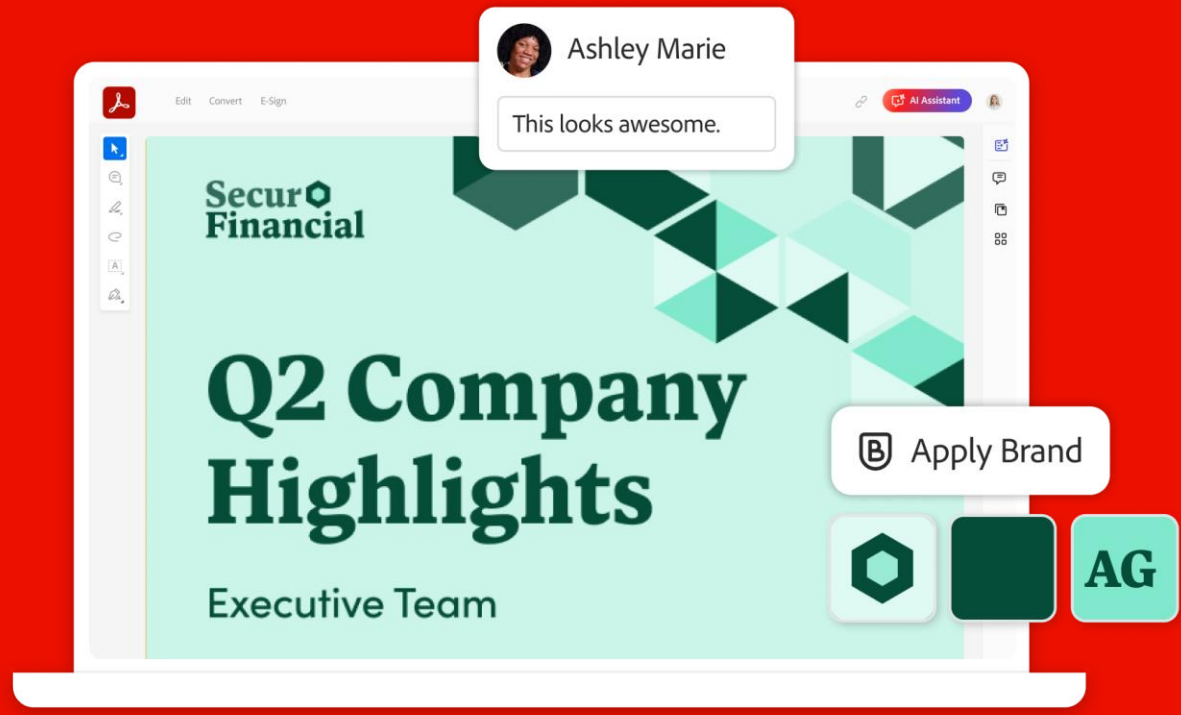
Use case #3

# Creation and distribution

# Collaboration distribution: Key needs

1. Polished, on-brand content
2. Data visualization
3. Secure sharing and tracking



# [DEMO placeholder Creation/Distribution]



1. McKinsey & Company, Seizing the agentic AI advantage, June 2025 | 2. McKinsey & Company, The state of AI: How organizations are rewiring to capture value, March 2025

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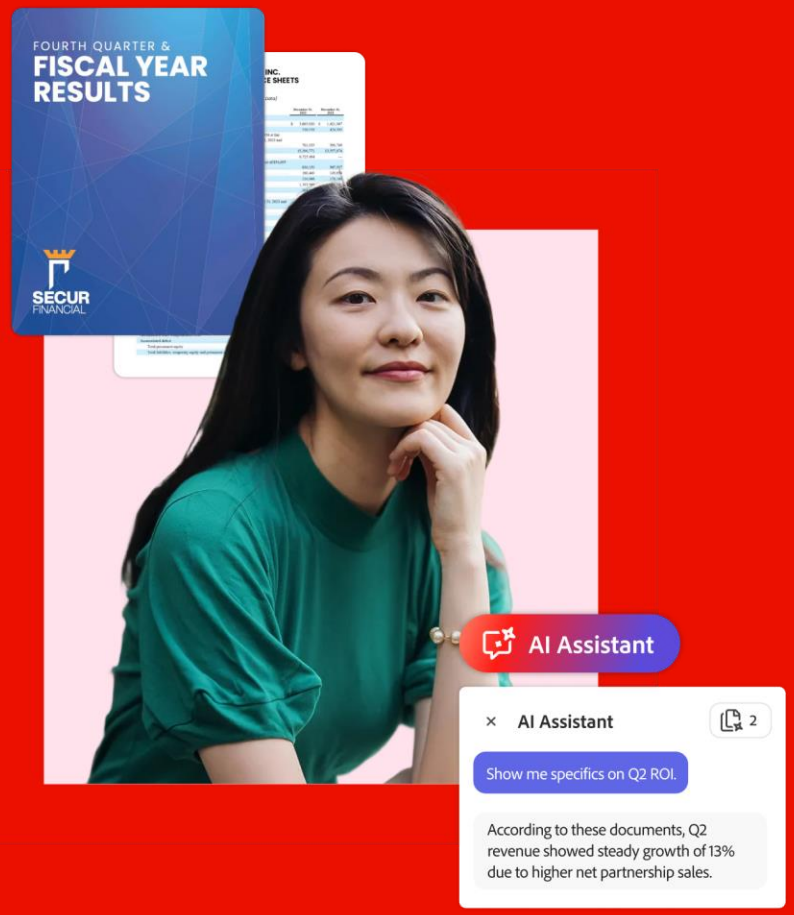
# Empowering Finance with Acrobat

Customer Zero

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# Adobe Customer Zero

**Milana Gilo**
Senior Manager of Business Process Optimization at Adobe

**Michael Slayday**
Senior Director of Business Process Optimization

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# Acrobat Generate presentation

1. **Problem**
   Preparing for a presentation is time-consuming.

2. **Existing process**
   Spend considerable time formatting while manually transferring information from various sections.

3. **Generate Presentation**
   Merges document information and creates content approved by the brand for evaluation.

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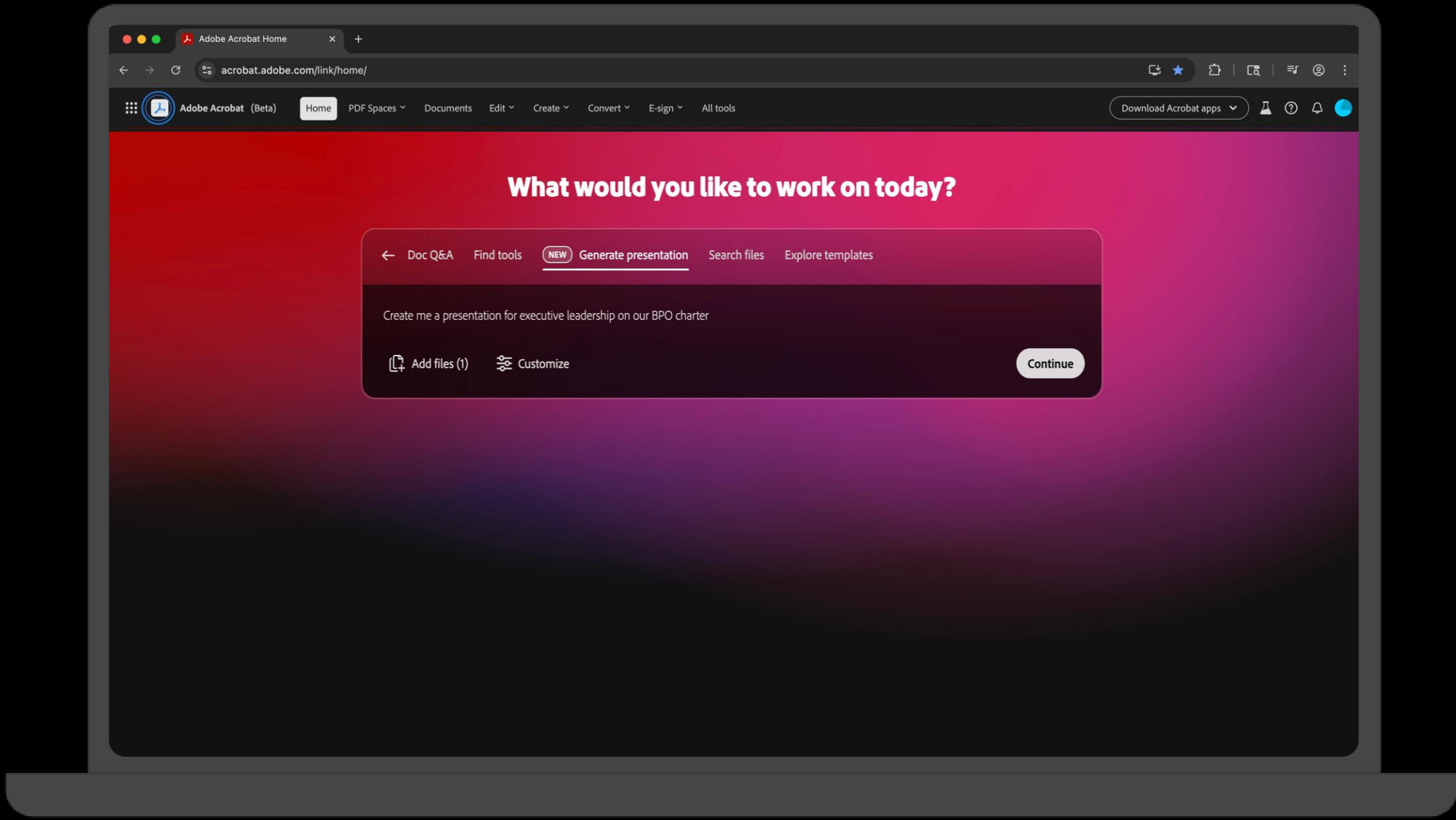
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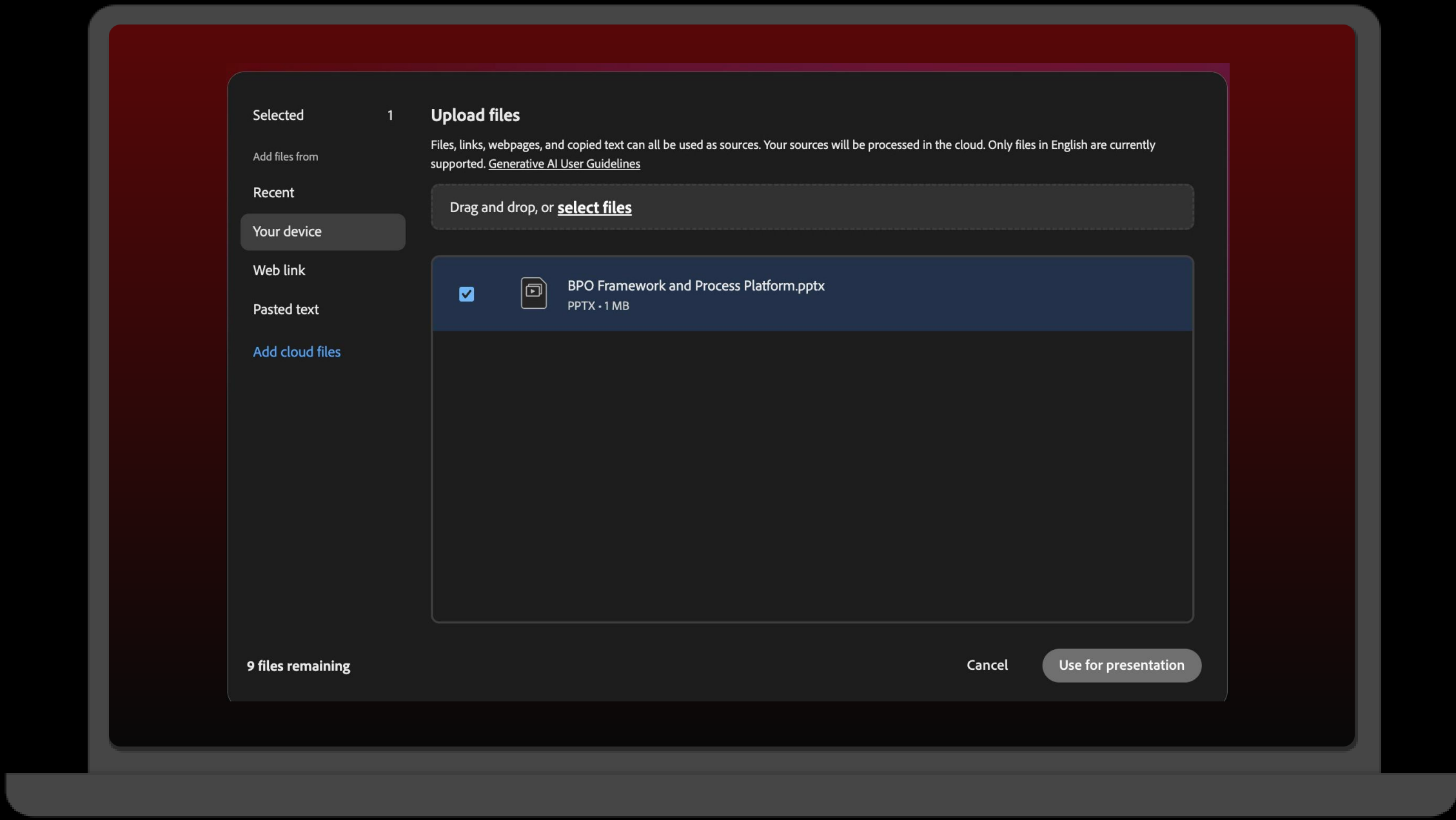
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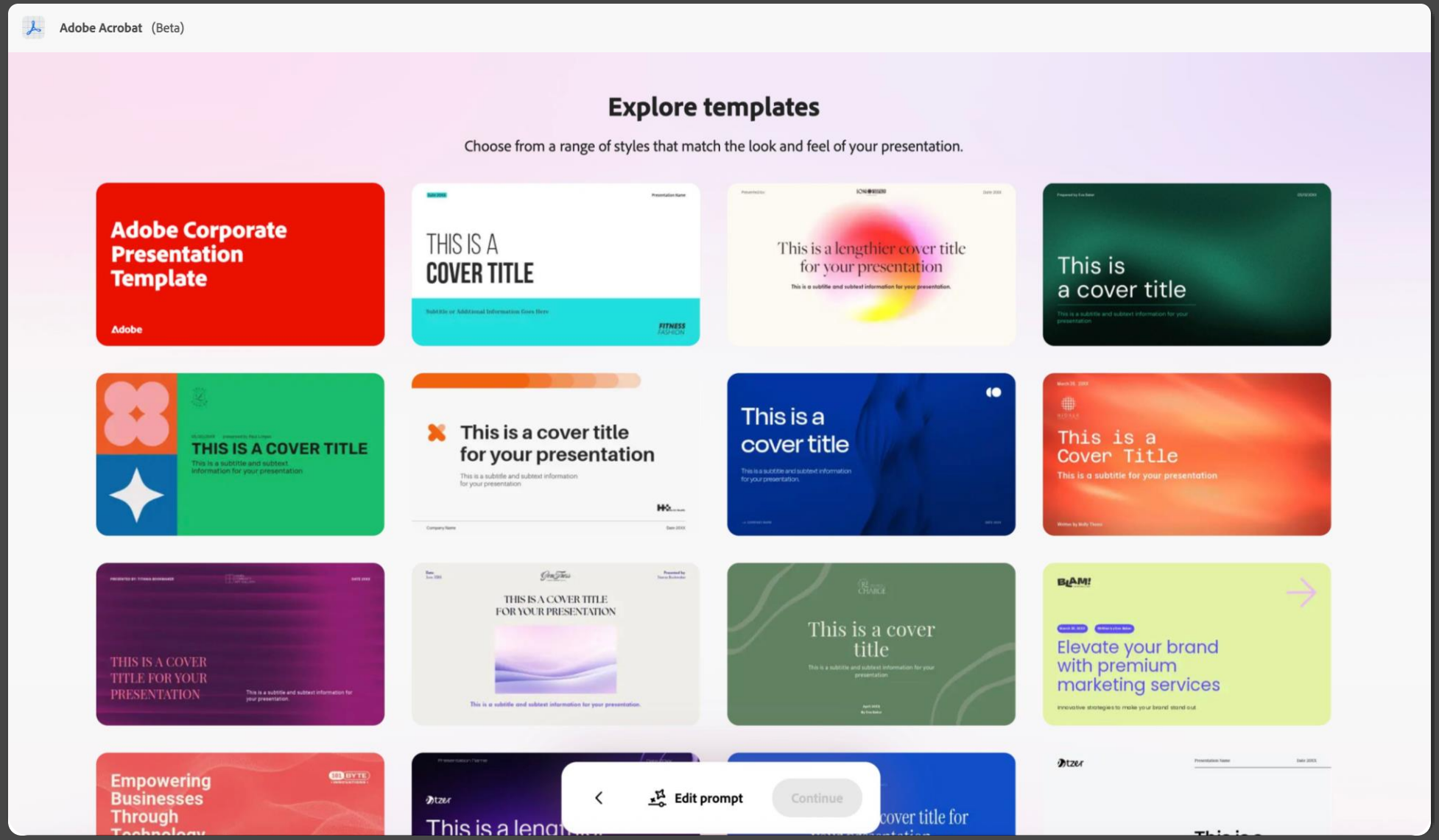
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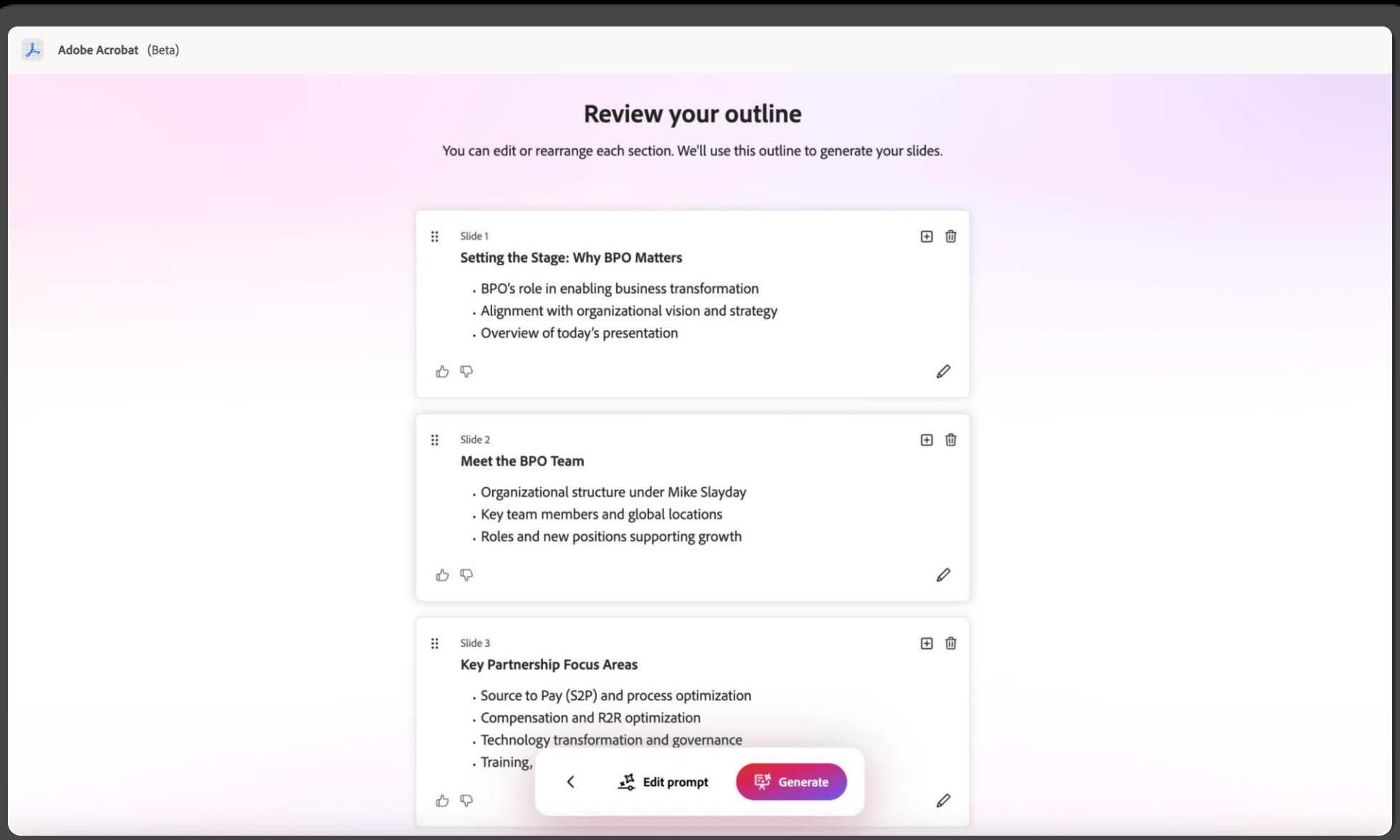
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Review your outline
You can edit or rearrange each section. We'll use this outline to generate your slides.
Slide 1
Setting the Stage: Why BPO Matters
. BPO's role in enabling business transformation
. Alignment with organizational vision and strategy
. Overview of today's presentation
Slide 2
Meet the BPO Team
. Organizational structure under Mike Slayday
. Key team members and global locations
. Roles and new positions supporting growth
Slide 3
Key Partnership Focus Areas
. Source to Pay (S2P) and process optimization
. Compensation and R2R optimization
. Technology transformation and governance
. Training,
Edit prompt
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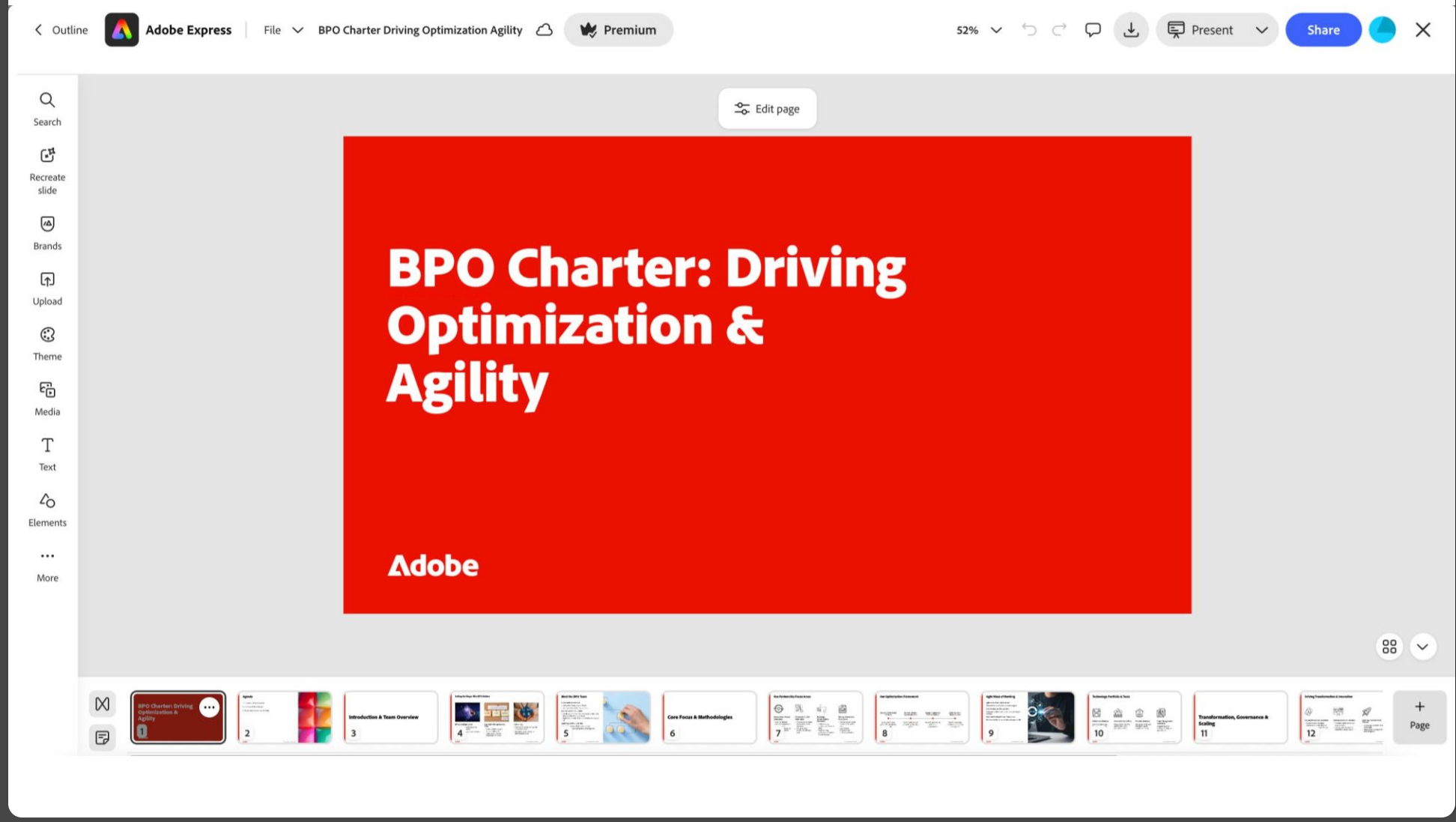
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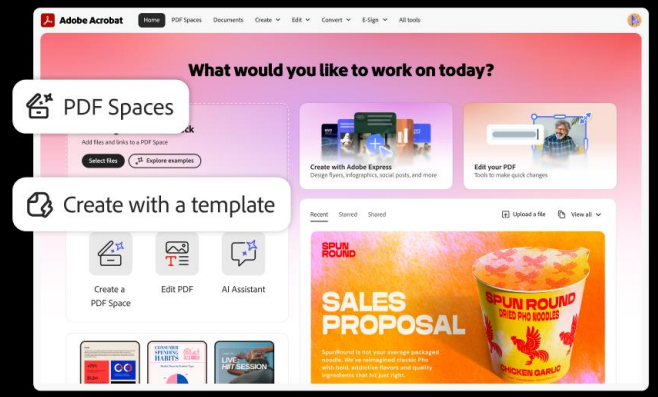
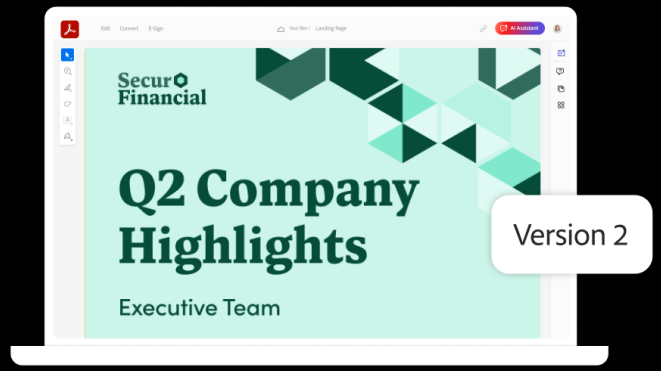
# Next steps: Opportunities with Acrobat Studio




**Centralized document hub**
All finance documents in one secure, accessible space

**Real-time collaboration**
Enable instant feedback and team input on key files




**Enhanced transparency**
Track changes and maintain clear version history

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