PRÉCIS.

FINANCE BRIEF · CFO & HEAD OF FP&A

An Introduction for Finance Teams

An introduction to the Précis Finance Intelligence Platform.

> *Finance that moves at the speed of your business.*

1. The finance-stack gap

Finance teams do not lack systems. The ERP records transactions. The data warehouse and BI layer aggregate and visualise trends. The EPM platform supports planning workflows, approvals, and plan consolidation. And yet the team's day-to-day is consumed running Excel by hand to carry the analysis between those systems.

The reason is structural. The questions the business asks rarely repeat: a board question by Friday, a new product line, a restructuring, a forecast refresh, a margin bridge that needs one more cut. No single system is scoped to answer them, and none has the modelling flexibility the work needs — so the work falls to the team, in Excel. Each question requires data from multiple systems, a model that may not already exist, and assumptions that have to be revised as the work develops.

AI features inside existing platforms are useful, but they inherit the scope of the platform they live in. An AI inside the EPM can help with the EPM. A conversational dashboard can answer questions about the dashboard. Microsoft Copilot can help inside Excel. The work that falls in the gaps between platforms is exactly the work an in-platform AI cannot reach.

That is the gap Précis is built for: the cross-system analytical work that today lives between the ERP, the warehouse, the EPM, and Excel.

2. What Précis is

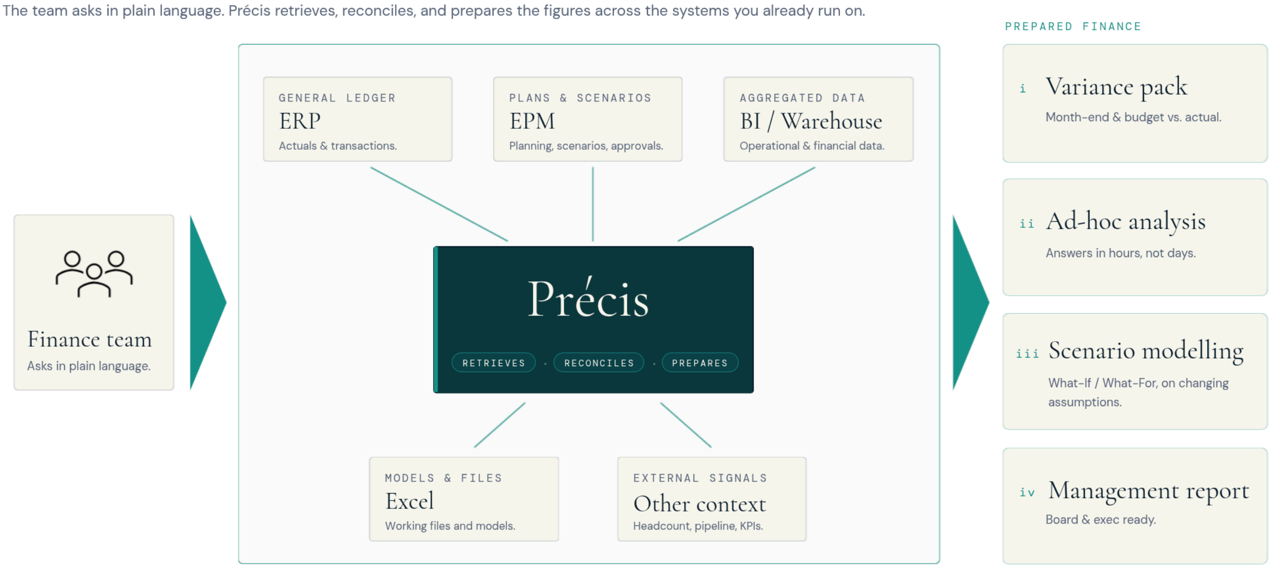
Précis is a **Finance Intelligence Platform** built for the cross-system analytical work that still falls to the Financial Planning & Analysis (FP&A) team.

The user directs the work in plain language. The agent retrieves the data, reconciles it across sources, prepares the figures, and structures the output. The analyst does the analysis.

The architectural difference is simple: Précis is built around an agent in the middle, given a set of tools, doing the legwork the user used to do by hand. It is built around the agent rather than around hardcoded data flows.

An agent in *the middle.*

The team asks in plain language. Précis retrieves, reconciles, and prepares the figures across the systems you already run on.



An agent in the middle, given a set of tools — working across the ERP, the warehouse, the EPM, and Excel on the team's behalf.

That matters because finance work changes as the business changes. A new cost-centre structure, a revised forecast, a pricing question, an acquisition model, or a board-pack request should not require the team to rebuild the workflow from scratch.

The boundary is equally important: **Précis prepares, the analyst decides.** It does not replace the financial analyst. It does not generate figures from a language model. Every figure traces back to source data: account, cost centre, period, and scenario. When the data is not there, the system says so.

3. What Précis does for the team

Précis delivers four things to a finance function. They sequence from the operational work that should already be prepared when the week begins to the strategic outputs finance produces for the business.

Routine analytical work, prepared automatically

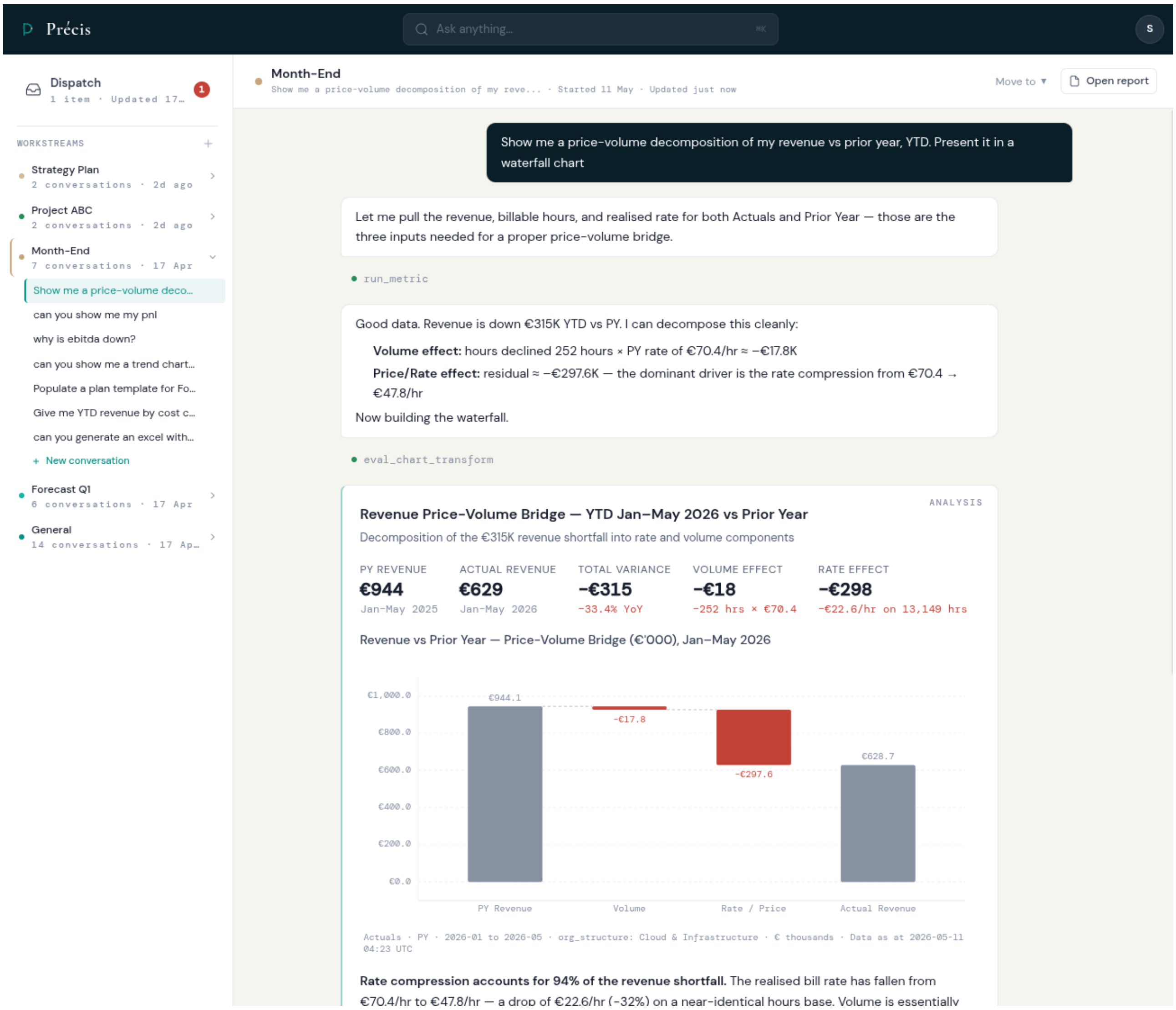
Variance breakdowns, reconciliations, and monthly-close inputs are prepared before anyone asks. The team arrives to find the figures gathered, reconciled, and laid out as briefing cards, with the largest movements first and each linked to its underlying drivers.

The analytical thinking is still theirs to do. The preparation is not.

Ad-hoc analysis, on request

A board paper, a strategic review, an unexpected variance: the analyst frames the question and Précis assembles the underlying data, structures the model, and surfaces the relevant cuts.

Outputs return as the artefacts the team would have built by hand: financial statements, tables, charts, and variance decompositions. The analyst keeps control of what the analysis actually says.

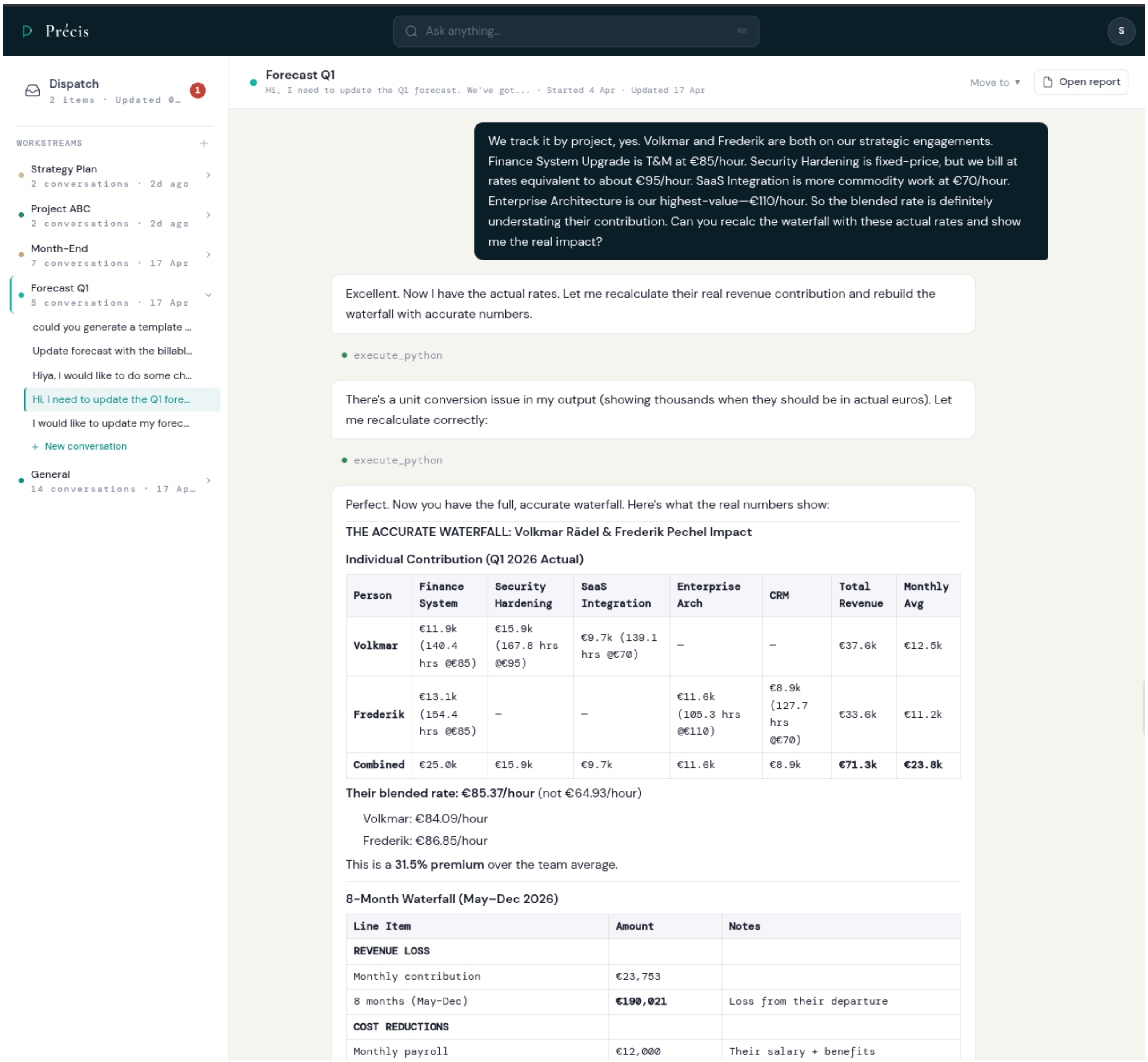


An ad-hoc decomposition: the team asks why a number moved, and Précis returns the breakdown — driver by driver, traceable to source.

Scenarios with retrieved assumptions

When the team models a strategic option, Précis pulls the current-state inputs from source: actual headcount, current pipeline, latest cost base, current actuals, and existing forecast assumptions.

The team works in conversation with the agent, revising assumptions and reviewing impact. The team owns the assumptions; Précis owns the data fetch.



A scenario in conversation: the team revises assumptions inline; Précis rebuilds the waterfall with full provenance.

Reports and management packs, co-produced

The team and the agent build the deliverable together: financials, charts, variance tables, and narrative drafts the analyst edits and signs off.

The output is the format the business already expects. The difference is that the team is no longer assembling every block by hand before it can start judging what the numbers mean.

4. Why it is different

Each category in the FP&A stack is built for the work inside its scope. Précis is built for the work between them.

EXISTING APPROACH	WHAT PRÉCIS DOES DIFFERENTLY
EPM platforms run the planning cycle and consolidation through fixed workflows.	Précis adds the flexible scenario modelling those workflows cannot.
BI tools visualise the dashboards and reports already in place.	Précis assembles the relevant data and structures the output for the new question being asked.
Excel gives the team flexibility, but leaves the manual data work to the analyst.	Précis preserves flexibility while taking on the cross-system legwork.
In-platform AI answers questions inside the system where it lives.	Précis is built for the work in between systems.
Generic AI tools can produce plausible text and may invent figures.	Précis retrieves, reconciles, and structures source data. Nothing is guessed.

5. The function finance is being asked to be

The CFO's brief has shifted. Boards and investors are asking what finance is doing with AI. The operating environment is generating scenario demand at a pace the team cannot carry. The questions arriving at finance need answers while the decision is still live, not after it.

Most of what is on offer in the market helps at the task level — quicker reconciliation, faster drafting, AI in the cells of a spreadsheet. Useful, but not the function-level change the board is actually asking for. The function being asked for is structurally different from the function most FP&A teams are configured to deliver.

The change Précis makes is not a new planning process. It is a different operating rhythm.

FINANCE TODAY	WITH PRÉCIS
Variance packs start with data collection and reconciliation.	The pack starts with the movements already gathered, reconciled, and prioritised.
Board questions trigger a round of spreadsheet assembly.	The team starts from a prepared answer, traceable to source, and spends the time on judgement.
What-if scenarios require analysts to gather actuals, drivers, and assumptions before modelling can begin.	The team generates scenarios in plain language, with assumptions retrieved from actual source data.
Management reporting absorbs analyst time before the story can be challenged.	Statements, tables, charts, and narrative drafts are prepared for review and sign-off.

The practical outcome is a finance function that can respond while the decision is still live. Decisions get faster because the analysis is ready when the question is asked; they get more accurate because they sit on top of current data, not yesterday's reconciliation.

6. Working with Précis

Implementation is measured in weeks, not months — 8-10 weeks end to end, with an implementation partner. The work is configuration, not custom development: understanding the chart of accounts, source systems, planning processes, and the FP&A workflows that hurt most.

Précis is deployed inside the customer's own cloud environment and connects directly to existing systems. The customer holds the contracts with the language-model provider directly, retaining control of commercial terms, privacy settings, and data residency.

The first engagement is deliberately practical: prove value against live finance work, not a transformation programme — a monthly variance pack from actuals, budget, and operational drivers; an ad-hoc board question answered with traceable source data; a scenario comparing the impact of hiring, pricing, or cost-base changes.

With the data work handled, finance can become the business partner the CFO has been asking for. The role of finance shifts: from delivering reports to shaping decisions.