

Finance Data Appliance (FDA)

Value-added finance, tax and risk data analytics and insights for transformative growth

The better the prompt. The better the answer. The better the world works.



Shape the future
with confidence



Microsoft

Business drivers

Business financial ecosystems are increasingly complex, with data volumes and varied systems posing challenges:

- Finance teams must navigate multiple platforms, source data from various locations and spend significant time preparing data.
- Simplification and transformation are lengthy and costly processes that may need repeating due to new technology gaps or organizational changes.
- Artificial intelligence (AI) adoption is further hindered by challenges in data readiness and modeling. Compounding this, many teams lack a scalable foundation to build custom agents and agentic workflows – limiting their ability to automate, generate insights and act quickly across the finance function.

Solution overview

The EY organization's **Finance Data Appliance (FDA)** solution is a Sarbanes-Oxley Act (SOX)-compliant, award-winning platform built on Microsoft Azure and deployable in EY or client infrastructure: It unifies data from multiple enterprise resource planning (ERP) systems, linking transactions to balances and helping deliver reusable, AI-ready insights across finance, tax, accounting, operations, and risk. It assists in accelerating automation and enabling out-of-the-box and custom AI solutions. Solution capabilities include:

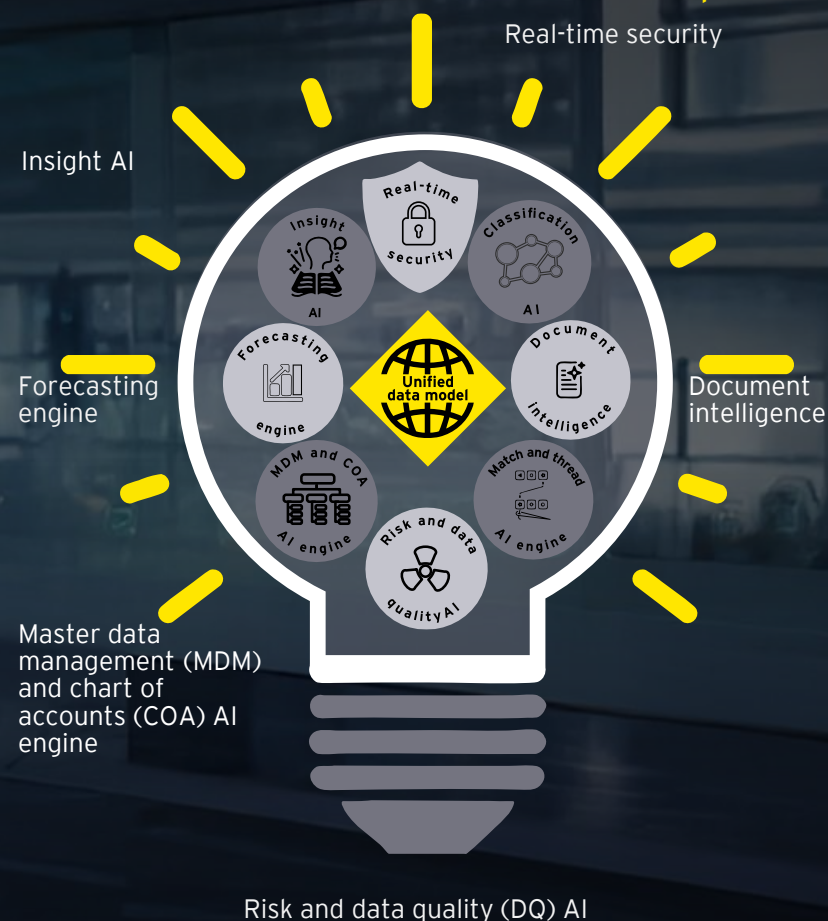
- Multi-industry application through unified data model and analytical engine
- Plug-n-play accelerators for data harmonization and threading at the transactional grain
- Value-journey acceleration of five to ten times by solving the complexity of diverse enterprise data
- Pre-built analytical and AI capabilities for finance and operations
- Modern and loosely coupled architecture to tap into AI and generative AI (GenAI) advancements
- Measurable drive down cost per outcome by product standardization and data reusability
- Microsoft Alliance support through Azure, PowerBI and Copilot

Solution benefits

The **FDA** solution provides immediate value with more than 30 AI-infused outcomes across nine critical finance solution areas. FDA helps enable rapid deployment with industry-standard connections, a scalable framework and proven blueprints that reduce redundant decisions. It also empowers teams with conversational AI for instant answers from financial data and serves as a launchpad for building custom agents and agentic workflows – accelerating insight generation and AI execution across the finance function:

- Greater than 80% auto-reconciliation of accounts
- Greater than 96% cash forecasting accuracy
- Five to ten percent increased accuracy of driver-based forecasting
- Fifty percent effort reduction for audit preparation
- Ten percent savings from visibility into cross-business spend
- Launchpad for custom agents and agentic workflows
- Conversational AI for instant answers from financial data

Unified data model architectural element deep dive



Solution differentiators

- **Better insights**
 - Advanced financial planning with AI-driven cash forecasting and driver-based planning
 - Automated reconciliation for faster, more accurate reporting
 - Actionable spend analytics to optimize procurement and uncover savings
 - A launchpad for custom AI agents and workflows, enabling deeper and more tailored insights
- **Speed-to-value**
 - Comprehensive data integration from multiple ERPs for rapid, cross-functional insights
 - Built-in AI capabilities help accelerate time-to-insight
- **Cost per outcome**
 - A single source of truth across finance, tax, accounting, operations and risk to drive scalable financial outcomes
- **SOX-compliant**
 - Helps ensure secure, audit-ready operations that meet regulatory standards

Joint value proposition

- By combining the EY organization's industry experience with advanced Microsoft technologies, the Finance Data Appliance solution helps enhance financial and operational performance.
- FDA leverages Microsoft Azure, PowerBI and Copilot to provide rapid insights and transformative growth.
- This partnership simplifies data management, assists in enhancing financial planning and improves decision-making.
- It empowers clients to activate AI capabilities across finance, achieve significant cost savings and drive business growth.

Case study

This multinational company operates across seven business segments, spanning a wide range of industries, including aviation, energy, health care and insurance. Amidst an ongoing transition to global business services (GBS), the company is navigating significant divestitures, acquisitions and business movements between segments.

Client challenge	Engagement summary	Value provided
<ul style="list-style-type: none">▪ More than 90 ERPs and more than 300 non-ERP systems (billing, procurement, human resources, travel, etc.)▪ Different chart of accounts (COAs) across businesses▪ Need for enterprise-wide comparability and visibility in a timely fashion	<ul style="list-style-type: none">▪ Visibility of performance metrics at the total company corporate level▪ Ability to drill-down to the lowest level of detail (individual transactions or documents)▪ Rapid enablement of new systems during mergers and acquisitions (M&A) activity to provide value to finance functions	<ul style="list-style-type: none">▪ Total of more than US\$325m annualized savings▪ Reduction in month-end close cycles by 60%▪ US\$50m in license costs and headcount reductions▪ Cross-business spend visibility and analytics generating more than US\$100m savings every year▪ Ability to predict cash availability and invest excess cash using subledger transactions▪ Auto-reconciliation of more than 70% of accounts across all business units▪ Retired more than 30 data silos

Contacts

EY



Sameer Sinha
Partner/Principal
Technology Consulting
Ernst & Young U.S. LLP
sameer.sinha1@ey.com

Microsoft



Jodi Lustgarten
Microsoft Alliance Director
Microsoft Corporation
jodise@microsoft.com

EY and Microsoft: helping the world work better to achieve more

Every day, throughout the world, businesses, governments and capital markets rely on EY business ingenuity and the power of Microsoft technology to solve the most challenging global issues with extraordinary, transformative outcomes.

EY and Microsoft bring a compelling formula to spark the potential of the cloud and unlock the power of data. We solve our clients' most challenging issues by blending trusted industry experience with innovative cloud technology. Our strategic relationship draws on decades of success developing visionary solutions that provide lasting value.

Together, we empower organizations to shape the future with confidence.

For more information, visit: ey.com/microsoft

EY | Building a better working world

EY is building a better working world by creating new value for clients, people, society and the planet, while building trust in capital markets.

Enabled by data, AI and advanced technology, EY teams help clients shape the future with confidence and develop answers for the most pressing issues of today and tomorrow.

EY teams work across a full spectrum of services in assurance, consulting, tax, strategy and transactions. Fueled by sector insights, a globally connected, multi-disciplinary network and diverse ecosystem partners, EY teams can provide services in more than 150 countries and territories.

All in to shape the future with confidence.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst and Young Global Limited, each of which is a separate legal entity. Ernst and Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com.

© 2025 EYGM Limited.
All Rights Reserved.

EYG no. 006973-25Gbl
ED None

This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, legal or other professional advice. Please refer to your advisors for specific advice

ey.com