CFO/Controller Assistant

Ask finance questions in natural language and get real-time, validated insights from Dynamics 365 F&O – complete with drill-downs, variance explanations, risk signals, and recommended next actions.

Overview

Sonata's CFO / Controller Assistant automates day-to-day finance decision support by turning Dynamics 365 Finance & Operations (D365 F&O) data into real-time insights, drill-down analytics, variance explanations, and risk indicators – so finance leaders can act with confidence in the numbers.

Built for modern finance teams, it enables CFOs, Controllers, FP&A, and Treasury to ask questions in natural language through familiar interfaces like Microsoft Copilot and Microsoft Teams and receive executive-ready narratives alongside validated calculations and recommended next steps.

Challenges

Organizations often struggle with finance visibility and speed due to fragmented data, manual analysis, and delayed reporting. Common pain points include:

- Limited real-time cash visibility
- Manual variance analysis
- Close status uncertainty
- Low transparency into cost drivers
- Blind spots in profitability analytics
- Lack of predictive insights

Key capabilities

The CFO/Controller assistant delivers a comprehensive suite of financial intelligence capabilities:

- Cash and liquidity intelligence – Real-time visibility into cash positions, liquidity forecasts, and working capital across legal entities
- Automated insights – Natural language explanations of variances, anomalies, and financial trends without manual analysis
- Performance analytics – Instant drill-downs into P&L, cost centers, and profitability by segment, region, or product

- Close assistant – Live monitoring of period-close status, open items, and bottleneck alerts to accelerate the close cycle
- Spend intelligence – Identification of cost drivers, over-budget categories, and leakage patterns with root-cause context
- Predictive analytics – Forward-looking signals on cash flow, budget adherence, and financial risk to support proactive decisions

How it works

Designed to reduce implementation anxiety with a clear, governed flow:

1. Ask finance questions in natural language via Copilot / Teams
2. Intent recognition & context validation to understand the question and validate access/reporting context
3. Trusted ERP data extraction from Dynamics 365 F&O
4. Financial analysis & validation with CFO-grade calculations and checks
5. Insight & narrative generation that translates numbers into executive-ready summaries
6. Executive actions with recommendations and suggested next steps

Business impact

Measurable outcomes finance leaders typically target with this assistant:

- Close cycle reduction (fewer days to close)
- Finance effort reduction (less manual analysis and reporting prep)
- Cost savings / leakage prevention through spends intelligence and anomaly signals
- Forecast accuracy improvement with predictive indicators and variance learning
- Faster decision cycle time for leadership and BU reviews

Who benefits

- CFO
- Controller
- FP&A

- ➢ Treasury
- ➢ BU head
- ➢ Audit

Sales inquiry

Write to us: partnerupdates@sonata-software.com