CFO Roundtable Key Takeaways

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FinQore Formerly SaaSWorks

5 Key Takeaways

Austin based PE-backed CFOs and finance leaders primarily from B2B businesses participated in a peer discussion and here's a summary of the key points we gathered from their conversation:

1 Using the Rule of 40 to Drive Strategic Trade Offs, Not Just Report Card Scores

CFOs noted that PE firms are increasingly using the Rule of 40 — and its variants like the Rule of 65 — as a core framework for valuing companies and setting performance expectations. But strategic finance leaders are starting to leverage it to drive broader discussions about tradeoffs between growth and profitability — with a sharper focus on the quality of revenue growth and the durability of gross margins. Several emphasized that presenting a compelling narrative around these tradeoffs is often more valuable than simply "hitting the number." As one participant put it, "We're not gaming to hit the Rule of 40—we're explaining what we're building and why."

2 Lean Teams Require a Shift from Operator to System Builder

Roundtable participants reflected on the operational reality of leading lean finance teams. Many CFOs are responsible for multiple functions, including HR and Legal, and emphasized the need to shift from personally executing tasks to designing scalable systems and workflows. They shared practices like delegating budget decisions to operating teams and embedding simple, directional KPIs to guide accountability. Participants agreed that overly complex metrics slow down insight, while "approximately right" guidance allows teams to move quickly. This mindset shift is enabling CFOs to operate more strategically despite limited resources.

3 From Exploration to Execution: Where AI Is Actually Delivering Value For Finance

CFOs shared that while AI-specific finance platforms are in the early innings, many finance teams are already using ChatGPT and Gemini to boost efficiency. A select few are hiring professionals with Python or data science backgrounds to better leverage data and AI. A few AI-forward tools were cited for automating repetitive tasks like planning and AP/AR. Use cases like board prep and investor communications were seen as especially promising. Despite growing interest, adoption remains cautious due to concerns around precision, explainability, and the need to fully validate AI-generated outputs.

4 Revisiting Pricing, CAC, and GTM Metrics to Protect Margins in a Tougher Market

CFOs discussed the need to reassess pricing and customer acquisition strategies in light of rising CAC and investor pressure on margins. Several noted a shift away from one-size-fits-all CAC, favoring high LTV segments. Concerns were raised about sales compensation structures that reward bookings without considering profitability. The group also discussed growing customer resistance to price escalators. The consensus: protecting margin and extending runway in today's environment requires a broader reexamination of GTM assumptions—not just tactical cost-cutting or headcount reductions.

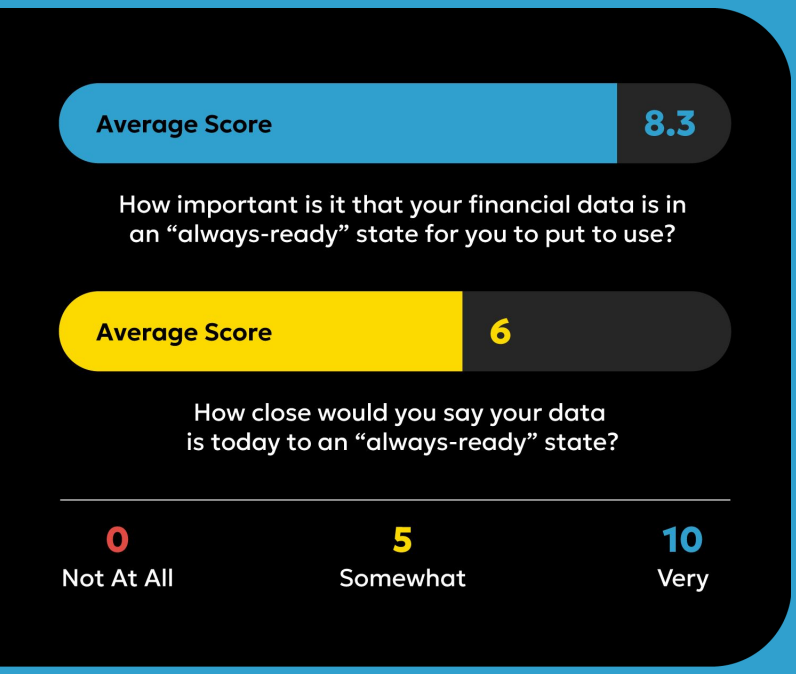
5 Data Rigor and Segment-Level Analysis Remain Core Challenges — Precision Is Now Outpaced by Urgency

Segmented financial data remains difficult to achieve, particularly for CFOs managing data across multiple systems. Participants noted that integrating CRM, billing, and product usage data still involves significant manual effort, with real-time visibility more of a goal than a reality. In breakouts, CFOs emphasized the value of tracking metrics by product, customer, or region to uncover inefficiencies and catch early signs of declining usage. While full automation isn't yet feasible for many, the consensus was that being "directionally correct" is often good enough. As one CFO put it, segment-level insights don't need to be perfect — just timely enough to inform decisions and prevent surprises.

CFOs Weigh-in on the Data Challenge

Before the Roundtable, we invited finance leaders to share their insights on the data challenges within their organizations.

First, we inquired about the significance of having data in an "always ready" state to put to use in real-time and then asked them to evaluate their current status on achieving this readiness. Using a scale from 0 (Not At All) to 10 (Very Important), the responses are summarized below:



We then asked Finance leaders to rank, from most difficult to easiest, the crucial tasks required to ensure a continuous stream of clean, segmented, and accurate data for strategic decision-making and proactive actioning for Finance as well as other operating teams within the organization.

While they shared answers, CFOs were also quick to note that all these tasks are both hard and important today. So there's not a lot that separates top from bottom in terms of priority.

The tasks ranked in order of being most challenging included:

1. **Making sure the data's accurate and reliable.**
2. **Having our data complete and segmented enough to help us generate insights we can confidently act on.**
3. **Setting up the data so it can alert us to changes and signals we should pay attention to.**
4. **Consolidating our data into a single source that all functions can access.**
5. **Enabling other functions to use the data without breaking something and compromising data integrity.**

Deep Dive: AI implications for Finance *(Quick Highlights)*

At the Austin CFO Roundtable, FinQore Co-Founder and CTO Jim O'Neill led a fast-paced, live demonstration of AI—showcasing what's possible today, what's coming next, and how finance teams can adopt it safely.

AI Agents Are No Longer Hype—They're Getting Work Done

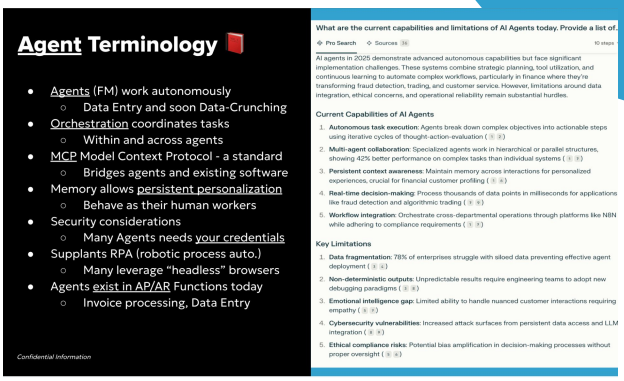
Jim described AI agents as interns capable of handling multi-step tasks—like generating daily compliance reports—with proper guidance. A live demo using OpenAI's Operator to automate SOC 2 prep illustrated what's now possible. The takeaway: agents aren't just answering questions—they're beginning to replace routine, repetitive work.

As AI's Capabilities Scale, So Must Controls:

- With automation comes risk. The session prompted a lively discussion about data security, especially around using AI Agents and Operators in environments handling sensitive financial or HR information. Jim emphasized FinQore's approach—single-tenant architecture, MFA, credential rotation, and strict boundaries on model behavior—as an example of how companies can embrace AI while staying compliant and secure.

AI in Finance Is About Elevating the Strategic:

A highlight of the session was a live demo of FinQore's AI-powered financial analyst "Qori", which built a fully annotated board deck in under three minutes. Attendees saw how AI can now automate deep analytics—like contribution margin and segmentation—while maintaining context-specific language. The implication: finance leaders can offload repetitive reporting and focus on strategic decision-making, faster.



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