Chat Questions from 9/10 Circle|Call:
Tactical AI for Finance Leaders

There were so many great questions in chat! Here's a recap of the answers from your VIPs: Ryan Roccon - CFO @ Zapier, Adam Klein - CFO @ Metronome, Dan Griggs - CFO @ Intercom, and Jeff Berry - CFO @ BluWave.

Asked By	Question	Answered By	Answer
Julia Liu - Independent	Ryan, this is super super cool. Does your team double check the work afterwards (like click into the links in the spreadsheets)?	Ryan Roccon @ Zapier	Yes and no. Yes - We'll test these heavily for the first few runs to make sure things are working properly and may double click into a high value/critical/variable rec at the end of quarter. Otherwise no, these are set it and forget it (and in most of these automations we've also built in exception reporting, so if something doesn't tie after the automation runs it will notify the right person in Slack).
Alexander Coates @ Airspace Technologies	I have a question about using AI for forecasting and modeling in general how that overlaps with Excel	Ryan Roccon @ Zapier	These things work in tandem, AI doesn't replace Excel/Google sheets today. AI does do a great job of building V1 sql queries that power excel models. It also does a reasonable job creating commentary for BvAs. And it's good at highlighting interesting variances/trends in data sets. I'd think of AI more like a power filter on top of Excel, at least today.
Dustin Pederson @ Locus Robotics	Adam, which tool did you use to do the vibecoding?	Adam Klein @ Metronome	We use Claude and OpenAI, Claude is much better to explain processes and give instructions to, and then Chat GPT Agent helps actually code. This is what our SE/SA team relayed is best. As we are flying blind without them. We used the ChatGPT agent feature for this purpose, post "perfecting" the vibe coding, so the agent runs around and does this…

Michael Golub @ Pano AI	Adam, what are the tools you're using for each of those examples you shared?	Adam Klein @ Metronome	For this specific use-case, we use Gemini too, so it is Google-centric, because it is mostly their ecosystem.
Michael Golub @ Pano AI	Adam, where do you then 'put' the code you generate? Google Colab or something similar?	Adam Klein @ Metronome	Clay for the repository of data, and updating LinkedIn movements, and announcements, then chatgpt to write personalized messages, or reach outs. Claude and OpenAI for the second one. Claude is better as an assistant to explain to you what you need to do, and then I take that output and have chatgpt help with the coding. (This was feedback from my technical team) And, Concourse for the last which plugs into QBO, SFDC, and other tools through API and then we query against it, great for quick ELT summaries, quick charts and graphs. To be clear, we are happy with our progress, but there are much deeper use cases that we are working towards!
Jamie Chesner @ Cadence	Are folks able to share how they are using AI within their financial modeling?	Ryan Roccon @ Zapier	Not using it in production of actual financial models (ie predicting values or creating structure). I've found it very helpful to compile benchmarks, especially for benchmarks that aren't as commonly found in the major VC benchmark reports (staffing structure, span of control, % insurance vs exposure, etc). Also super useful for SQL query writing when building underlying data structures for financial models.
Thomas Chuang - Independent	Jeff, how do you ensure data privacy (that gpt wouldn't use it for training) if you pump your slide decks through?	Michael Golub @ Pano AI Jeff Berry @ BluWave	Michael Golub @ Pano AI - To the question on how to make sure that AI is not using your data, one more thing to add is that you should centrally control your subscriptions. Get a Business or Enterprise subscriptions so that you can centrally administer that your data is not used. Do not rely on individuals paying for their own account and choosing the right settings. It is easy to sign up for these and administer. Jeff Berry @ BluWave - We use the ChatGPT Business plan, which allows us to opt out of any training with our data. We've spoken with a number of AI consulting firms in our B2B marketplace, who have advanced knowledge of sharing data with ChatGPT – all have said it's secure

			with a Business plan. If there are still concerns with sharing the data, there are two workarounds: 1) build a custom LLM on a privately hosted cloud (our IT team stood this up within a day, and it leverages the user's choice of model), and 2) create a blinded reporting package with Salesforce IDs vs customer or vendor names (ie same assets, but do a lookup or Index Match to replace the customer name with a blinded one).
Julia Liu - Independent	How are folks thinking about making the time to trial and error automations - is there capacity on your teams, hiring new folks?	Adam Klein @ Metronome	Candidly, I won't hire someone that isn't experimenting already, and we test this in the interview process now. I push the current members to demo tools, do POCs, etc. it is a non-negotiable. And, weekends / mornings — any free time when I have a few hours to sit and play around.
John Ewert @ Eclypsium	Follow up... for the common AI tools I am assuming most are using company provided accounts to ensure data processed by third-party cloud vendors is covered by contractual security and privacy guarantees? How difficult and costly has the process been signing up OpenAI ('ChatGPT'), Anthropic ('Claude') or Google ('Gemini')?	Michael Golub @ Pano AI Dustin Pederson @ Locus Robotics Ben Warner @ clearer.io	Michael Golub @ Pano AI: We have done this for ChatGPT and Claude. We are a Google house and so Gemini follows your Google Workspace account protections and so you get that "out of the box" with Gemini when you're a Google Workspace house Dustin Pederson @ Locus Robotics: depends on the tool/version/featureset, but for enterprise Copilot/OpenAI, $20-$30 pupm seems to be pretty typical Ben Warner @ clearer.io: We just switched to enterprise, which is 10% more than teams. We switched for the ability to measure how people are using it and for the ability to centralize control of integrations. One negotiating heads up. They will contract you at a minimum seat commit, which you can't tune down. Lowering our commit did not increase our pricing and we have the flexibility to add seats at negotiated cost.
Rob Jacobs @ accessiBe	Where did you start? Was it primarily self exploration, finance and internal collaboration, a partner or something else? What was most critical in helping you navigate the learning curve, limitations and functionality?	Tod Harmon @ Scribd	At Scribd we used a Hack Week that was solely focused on AI across the company