



Using AI to Analyze Financial Results With Solver

Discover how finance teams are using AI, Microsoft Copilot, and Solver to turn financial data into faster insights and better decisions.

September 2026

forv/s
mazars

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

1,800+

Combined Partners

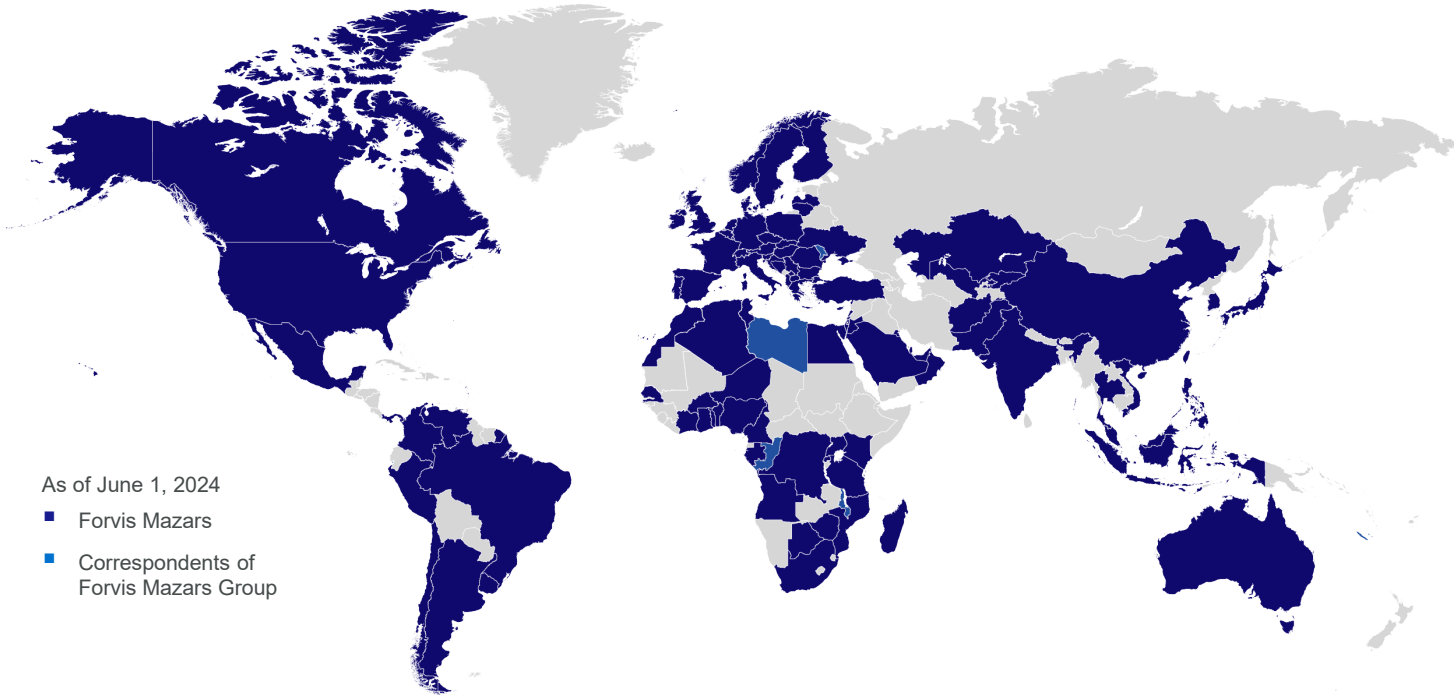
40,000+

Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (estimated) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- | | | | | | | |
|--------------------------|--|--------------|---------------|-------------------|----------------|------------------------|
| ■ Afghanistan | ■ Cameroon | ■ Gabon | ■ Kuwait | ■ New Caledonia | ■ Senegal | ■ United Arab Emirates |
| ■ Albania | ■ Canada | ■ Germany | ■ Kyrgyzstan | ■ Niger | ■ Serbia | ■ United Kingdom |
| ■ Algeria | ■ Cayman Islands | ■ Ghana | ■ Latvia | ■ Nigeria | ■ Singapore | ■ United States |
| ■ Angola | ■ Chile | ■ Greece | ■ Lebanon | ■ North Macedonia | ■ Slovakia | ■ Uruguay |
| ■ Argentina | ■ China | ■ Hong Kong | ■ Libya | ■ Norway | ■ Slovenia | ■ Uzbekistan |
| ■ Australia | ■ Colombia | ■ Hungary | ■ Lithuania | ■ Oman | ■ South Africa | ■ Venezuela |
| ■ Austria | ■ Congo | ■ India | ■ Luxembourg | ■ Pakistan | ■ Spain | ■ Vietnam |
| ■ Bahrain | ■ Côte d'Ivoire | ■ Indonesia | ■ Madagascar | ■ Palestine | ■ Sweden | ■ Zimbabwe |
| ■ Belgium | ■ Croatia | ■ Ireland | ■ Malawi | ■ Panama | ■ Switzerland | |
| ■ Benin | ■ Cyprus | ■ Israel | ■ Malaysia | ■ Peru | ■ Taiwan | |
| ■ Bermuda | ■ Czech Republic | ■ Italy | ■ Malta | ■ Philippines | ■ Tanzania | |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Japan | ■ Mauritius | ■ Poland | ■ Thailand | |
| ■ Botswana | ■ Denmark | ■ Jordan | ■ Mexico | ■ Portugal | ■ Togo | |
| ■ Brazil | ■ Egypt | ■ Kazakhstan | ■ Moldova | ■ Qatar | ■ Tunisia | |
| ■ Bulgaria | ■ Finland | ■ Kenya | ■ Morocco | ■ Romania | ■ Turkey | |
| ■ Burkina Faso | ■ France | ■ Korea | ■ Mozambique | ■ Rwanda | ■ Uganda | |
| | | ■ Kosovo | ■ Netherlands | ■ Saudi Arabia | ■ Ukraine | |

U.S. Presence

Leading U.S. Firm

\$2.24B

Revenue (FY 2025)¹

77

Markets

31

States

600+

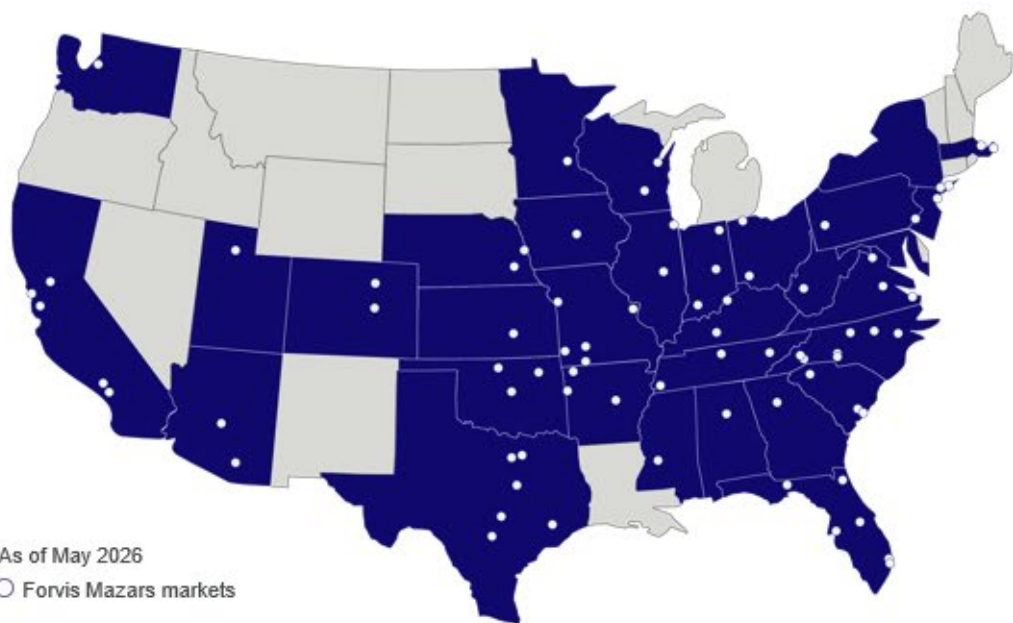
Partners & Principals

7,000+

Employees

84 Net Promoter
Score^{® 2}

("World-Class" Ranking)



Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-
Metro Area
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond

Washington D.C.
Metro Area

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

Business Technology Services

We help organizations address business challenges & support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, and business intelligence (BI) tools.

Our end-to-end technology solutions and managed services help clients advance their digital transformation goals. Services include:

- | | | | |
|--|--|---|--|
|  | Solution Assessment and Selection |  | Implementation Project Rescues |
|  | System Implementation and Integration |  | Business Intelligence (BI) and Analytics |
|  | Process and Technology Design |  | Robotic Process Automation (RPA) |
|  | Upgrades, Enhancements, and Automation |  | Custom Application Development |
|  | Training, Monitoring, and Support |  | Managed Services |



Business Technology Services

For SMB, Middle Market & Global Organizations



System Integration

ERP, intelligence, automation, and CRM solutions designed to connect core operations.

ERP

- Microsoft Dynamics 365 Finance, SCM, Project Operations, Commerce, Business Central (GP, NAV, AX)
- Oracle NetSuite
- Sage Intacct, Sage 100, Sage 500, Sage Fixed Assets
- Trimble Construction One, Viewpoint, Spectrum, Vista

Intelligence & Automation

- Microsoft Copilot Studio
- Microsoft Power Platform
- Microsoft Azure
- Workato
- Artificial Intelligence (AI)
- Robotic Process Automation (RPA)
- Custom Application Development
- Business Intelligence (BI)
- Solver Extended Financial Planning & Analysis (xFP&A)

CRM

- Microsoft Dynamics 365 CRM: Sales, Customer Insights, Customer Service, Field Service
- Marketing Automation



Managed Services

Ongoing support, security, operations, and application management that help support continued system performance.

Cybersecurity

- 24/7/365 Security Operations Center (SOC)
- Managed Detection & Response (MDR)
- Managed SIEM
- Vulnerability Management
- Managed Brand Protection
- Managed Incident Response
- Virtual CISO (vCISO) Advisory
- Partnerships with SentinelOne, Elastic, Qualys, and more

IT Operations

- Virtual Chief Information Officer (CIO)
- Network Operations Center (NOC)
- Cloud Infrastructure (Azure & AWS)
- Managed Server and Desktop
- Managed Backup and Recovery
- Procurement

Business Applications

- Microsoft Dynamics ERP & CRM
- Microsoft Power Platform
- Microsoft 365
- Oracle NetSuite
- Sage and Sage Intacct
- ISV Add-On Management
- Release and Upgrades Management
- Automated Testing Setup & Support
- End-User Training

Today's Presenter



Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

Objectives

1. Discuss how AI can help surface key financial drivers, variances, and trends to help enable faster, more informed decision-making at the leadership level.
2. Recognize how AI-enhanced modeling in Solver can help strengthen forecast accuracy and support scenario planning aligned to business goals.
3. Describe how modern extended financial planning and analysis (xFP&A) capabilities can help streamline reporting and free up time for higher-value analysis, positioning finance as a strategic business partner.



Agenda

01

AI at 36,000 Feet

How generative and deterministic AI differ

02

Solver Copilot Analysis Agent

What the agent does, and what it does not

03

Setting Your Reports Up for Success

Structuring reports the agent can read

04

Analyzing Your Reports

Prompting for useful, repeatable answers

05

Sharing the Reports and Data

Taking the analysis beyond Solver



AI at 36,000 Feet



AI at 36,000 Feet

Generative AI ¹

01

Predicts Answers

Generates the most likely response rather than retrieving a stored one.

02

Uses Probabilities

Every output is a weighted choice, so results can vary run to run.

03

Learns From Data

Behavior is shaped by large volumes of text, code, and images.

04

Recognizes Patterns

Strong at language, structure, and similarity across content.

¹ Gomboc AI, "Deterministic vs Generative AI: Key Differences," [Gomboc AI Blog](https://gomboc.ai/blog). [\[gomboc.ai\]](https://gomboc.ai)

AI at 36,000 Feet

Generative AI²

Use Cases

01

Writing

Drafts, summaries, and rewrites that match a given tone.

02

Coding

Generates, explains, and debugs code across languages.

03

Analysis

Surfaces themes and insights from unstructured content.

04

Contextual Reasoning

Interprets intent and nuance instead of matching keywords.

² Gomboc AI, "Deterministic vs Generative AI: Key Differences," [Gomboc AI Blog](https://gomboc.ai/blog). [\[gomboc.ai\]](https://gomboc.ai)

AI at 36,000 Feet

Deterministic AI³

01

Predefined Logic

Follows explicit rules authored and reviewed by people.

02

Same Answer Each Time

Identical inputs are designed to produce identical, repeatable outputs.

03

Structured

Runs on defined data with traceable, auditable steps.

³ Gomboc AI, "Deterministic vs Generative AI: Key Differences," [Gomboc AI Blog](https://gomboc.ai/blog). [\[gomboc.ai\]](https://gomboc.ai)

AI at 36,000 Feet

Deterministic AI⁴

Use Cases

01

Workflow Automation

Rule-driven steps that must execute the same way every run.

02

Economics

Models where stated assumptions drive repeatable results.

03

Weather Forecasting

Physics-based simulation applied to measured inputs.

⁴ "Understanding Deterministic Models: A Simple Guide," YouTube video

AI at 36,000 Feet

THE DEFAULT

AI models are probabilistic

Ask the same question twice and the wording, the emphasis, and sometimes the answer will shift.

THE REQUIREMENT

Determinism is engineered

Repeatable output comes from the structure you build around the model, not from the model itself.

Design the guardrails first: fixed prompts, validated inputs, and checked outputs.

Solver Copilot Analysis Agent



Solver Copilot Analysis Agent

01

Included With Solver Cloud

Available to every Solver Cloud subscription with no separate add-on.

02

Built on Azure OpenAI

Runs on Microsoft Azure OpenAI GPT inside the enterprise service boundary.

03

Analyzes Your Reports

Reads the report in front of you and explains what the numbers show.

Solver Copilot Analysis Agent

What it Does



Detect Anomalies

Flags values that break from the expected pattern.



Identify Trends

Highlights direction and momentum across periods.



Analyze Root Causes

Traces a result back to the drivers behind it.



Narrative Summaries

Turns the numbers into plain-language commentary.



Prediction-Based Advice

Suggests next actions from projected outcomes.



Transparent Reasoning

Shows the logic behind every observation it makes.

Solver Copilot Analysis Agent

What It Doesn't Do



Change Data

Read-only. It never writes to or alters your reports.



Replace You

Judgment and the final call stay with the analyst.



Store Conversations

Sessions are not retained once you close them.



Guarantee Accuracy

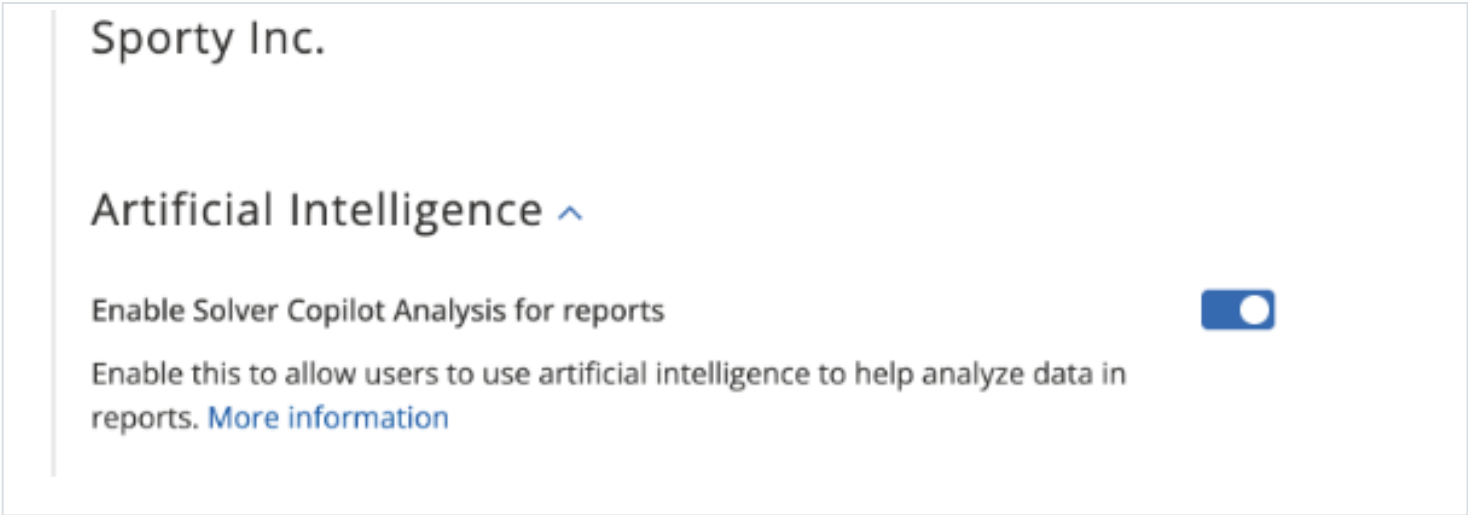
Output supports review; it is not audit assurance.

Solver Copilot Analysis Agent

How to Enable

THREE STEPS

- 1 Log in as an administrator
- 2 Go to Settings >> Administration >> Overview
- 3 Slide the toggle switch to the right



Settings >> Administration >> Overview, Artificial Intelligence section

Setting Your Reports Up for Success



Setting Your Reports Up for Success

01

Structure the Report

Clean rows, columns, and headers help the agent interpret the report.

02

Use Common Terms

Standard labels such as Net Income and Sales map to what the model already understands.

03

Label Column Periods

Name every period explicitly so comparisons are never inferred from position.

04

State Units and Scale

Spell out currency, thousands or millions, and any assumption behind the figures.

Analyzing Your Reports



Analyzing Your Reports

Tips for Prompting

01

Be Clear and Concise

Ask one specific question at a time and say exactly what you want back.

02

Avoid Vague Prompts

Broad asks produce broad answers; name the account, period, or comparison.

03

Provide Relevant Context

Add the role, the entity, and the timeframe so the answer fits your situation.

Analyzing Your Reports

Examples

Asking the Question

Report Templates > R111 - Monthly Reporting Package

Export Comment Share Add to Archive Run in Report Designer

Report parameters

Period: 202109 Entity: SUS Department: 100:500 Budget Scenario: BUD Forecast Scenario: FCST

Run Last run: 20 minutes ago

Auto-refresh: Off

MONTHLY REPORT BOOK

Entity: Corporate US

Page	Report Description	Purpose
1	Table of Contents	Overview
2	KPI Dashboard	KPIs and summary figures
3	Cash Flow Diagram	P&L and Balance Sheet drivers of Liquidity
4	Corporate P&L	Profit & Loss Report
5	Corporate Balance Sheet	Balance Sheet Report
6	Corporate Cash Flow	Cash Flow Report
7	Comments	All Accounts with Managers' comments

Page

Department Revenues & Expenses

Departmental reports

Link

Administration

Link

Finance & Accounting

Link

Human Resources

Content

KPI Dashboard

Cash Flow Tree

Consol P&L

Consol Balance Sheet

Consol Cash Flow

100

110%

Analysis Agent PREVIEW

Charles Allen Corporate Demo

WQ

Welcome to Solver Copilot

How can I help you today?

Analysis scope: Content

As a world-class CFO reviewing this P&L report, what are the five most important questions I should be asking to understand performance, risks, and opportunities?

Please answer each of those five questions and include both the original question and your answer for each. If you could recommend only one area for deeper investigation or management follow-up, what would it be and why?

Which additional reports or analyses would you recommend reviewing to better understand the key drivers behind this performance?

Solver Copilot uses AI. Verify results.

Analyzing Your Reports Examples

The Result

Report Templates > R111 - Monthly Reporting Package

Export Comment Share Add to Archive Run in Report Designer

Report parameters

Period: 202109 Entity: SUS Department: 100:500 Budget Scenario: BUD Forecast Scenario: FCST

Run Last run: 4 minutes ago

Auto-refresh: Off

Consolidated Profit & Loss

Entity: SUS - Corporate US

20% Flag Any Cell Variance Above/Below

These Accounts have management comments

	Sep-2021 Actual	Sep-2020 Actual LY	Sep-2021 Budget	Act vs Act LY Var	Act vs Act LY Var %	Act vs Bud Var	Act vs Bud Var %	Sep-2021 Actual YTD
REVENUE								
TOTAL REVENUE	2,563,145	1,271,357	1,267,233	1,291,788	101.6%	1,295,912	102.3%	13,968,904
COST OF SALES								
TOTAL COST OF SALES	1,454,515	262,877	246,880	1,191,638	453.3%	1,207,635	489.2%	3,762,847
GROSS MARGIN	1,108,630	1,008,480	1,020,353	100,150	9.9%	88,277	8.7%	10,206,057
GROSS MARGIN %	43.25%	79.32%	80.52%	7.75%		6.81%		73.06%
OPERATING EXPENSES								
TOTAL OPERATING EXPENSES	930,355	980,306	931,380	(49,952)	-5.1%	(1,025)	-0.1%	8,996,417
EBITDA	178,276	28,174	88,973	150,102	532.8%	89,303	100.4%	1,209,640
OTHER INCOME/EXPENSES								
TOTAL OTHER INCOME/EXPENSES	89,671	89,731	84,107	(60)	-0.1%	5,564	6.6%	849,737
NET INCOME (LOSS)	88,605	(61,557)	4,866	150,162	-243.9%	83,739	1720.9%	359,903

Content KPI Dashboard Cash Flow Tree Consol P&L Consol Balance Sheet Consol Cash Flow 100

Analysis Agent PREVIEW

- Cost Center Expense Drilldown:** For high-variance or high-scale expense accounts.
- Cash Flow Statement:** To ensure profitability trends are aligned with liquidity.
- Sales Conversion & Pipeline Reports:** Tie revenue growth to operational sales effectiveness.

Executive Summary

- Strong Revenue Growth** has propelled a turnaround in net profits.
- Margin Compression** warrants urgent review, as rising costs have offset some revenue gains.
- Operating Expenses** remain well-managed and on budget.
- Focus on Gross Margin** and monitor unit economics to sustain profitability.
- Additional, more granular margin and cost analyses are recommended to secure continued earnings growth and manage risk.

Analysis scope: Consol P&L

Ask anything

Solver Copilot uses AI. Verify results.

LIVE WALKTHROUGH

Demo



Analyzing Your Reports

Prompting Information

PERSONA

Who is asking

Naming a role steers the answer toward what that person actually needs to see.

CFO | President | Controller

ORGANIZATION

What kind of business

Naming the organization type grounds the answer in the metrics that matter to it.

Hospital chain | Beverage distributor | Watch maker

Sharing the Reports and Data



Sharing the Reports and Data

01

When to Share Out

Useful whenever the analysis needs to continue outside of Solver.

02

Export Reports

Send a finished report out in a standard format for wider distribution.

03

Use the Data API

Feed Solver data straight into another system for ongoing analysis.

Q & A



Business
Technology
Services

Questions?

Contact

Forvis Mazars



Charles Allen

Senior Managing Consultant

charles.allen@us.forvismazars.com

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