

# AI-Driven Financial Management

Harnessing  
ServiceNow AI  
Agents for Cost  
Optimization



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# Introduction

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Agility, clarity, and control are imperatives in today's IT financial management practice.

Organizations are under constant pressure to optimize costs, justify investments, and adapt to a technology environment that moves faster every quarter. Proven Optics is built for this reality, delivering solutions that combine ITFM best practices with ServiceNow's AI capabilities to help companies lead with data, not react to it.

Proven Optics brings a clear mission to the table: make IT financial management smarter, faster, and less manual.

We turn financial operations from back-office tasks into strategic functions that directly support business outcomes – and our AI agents are central to that transformation.



# The AI Assistant

## Your Productivity Powerhouse

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Manual processes are bottlenecks.

Our AI Assistant automates the repetitive, time-consuming tasks that drain productivity—including transaction reconciliation, budget updates, and cost model calculations. The AI Assistant ensures that your financial data is always accurate and up-to-date. It streamlines daily operations, monitors your cost model to determine when data is ready, and triggers calculations automatically, reducing delays and improving efficiency.

But automation is just the start. The AI assistant also continuously checks for unmapped transactions, budget anomalies, or other potential issues that could impact your financial health. Instead of waiting for problems to show up in end-of-month reports, you're alerted in real time—giving you the ability to fix small issues before they become major ones.





# The AI Analyst

## Uncover Hidden Insights in Your Data




Collecting data isn't hard. Knowing what it means – and what to do about it – is where most organizations fall short. The AI Analyst changes that by surfacing real insights from your IT financial data.

Proven Optics' AI Analyst uses advanced algorithms to analyze your financial data, identify trends, and uncover the "why" behind those trends. Whether it's identifying cost outliers, detecting inefficiencies across IT services, or explaining unexpected fluctuations in cloud spending, the AI Analyst provides the insights you need to make smarter, data-backed decisions.

Our AI Analyst uses visual storytelling techniques to create dynamic dashboards that illustrate spending patterns, ROI metrics, and other key performance indicators. With the AI Analyst, you can quickly and easily understand your financial data and communicate those insights to stakeholders across the organization.

# The AI Consultant

## Your Strategic Advisor



Great financial management isn't reactive—it's predictive. The AI Consultant moves you from hindsight to foresight, delivering proactive advice based on historical data, real-time performance, and industry benchmarks.

Through scenario modeling, it helps you simulate how shifts in market conditions, technology demand, or strategic priorities will impact your budget. It also surfaces specific, actionable recommendations—like how to reallocate spend across business units, tighten forecasts, or align IT investments with organizational goals.

With the AI Consultant, finance leaders and CIOs get more than just numbers—they get a strategic roadmap for smarter, faster decision-making.



# ServiceNow AI Integration



servicenow®



Proven Optics solutions are purpose-built on the ServiceNow platform, taking full advantage of its AI engine without introducing unnecessary complexity or third-party risk.

**Generative AI** summarizes complex cost data into executive briefs, so stakeholders can quickly grasp key financial trends.

**Real-Time Analytics** monitors spend against budgets using ServiceNow's dashboards, providing instant insights into financial performance.

**Governance** ensures compliance with built-in risk management frameworks, helping you maintain financial integrity.

# Why This Matters for IT Leaders

## **Control Spend Without Slowing Down**

Automate manual work, uncover hidden risks, and spot savings opportunities – all without adding overhead.

## **Align IT Spend with Strategic Outcomes**

Tie budgets and forecasts directly to business priorities, not just department requests or guesswork.

## **Scale Securely with ServiceNow**

Native ServiceNow integration ensures consistent, secure data handling across IT and finance teams.

## **Stay Ahead, Not Just Caught Up**

Proven Optics helps you move faster – not just react faster – with AI-driven insights and recommendations designed for real operational environments.



## **Embracing Fiscal Responsibility with Proven Optics and ServiceNow**

Proven Optics gives organizations the power to turn IT financial management into a competitive advantage – making cost modeling faster, more accurate, and more strategic.

Our AI agents automate the grind, uncover insights that matter, and deliver actionable advice – so you're not just reporting numbers; you're driving better outcomes.





# Proven Optics

Built on ServiceNow.  
Powered by AI.



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