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LedgerFlow
CONNECTED FINANCE AUTOMATION

Example SEO & AEO Audit
An example of the strategic analysis and action plan we can deliver for your company.

Search and AI Discovery: Opportunity Analysis & Action Plan

Findings and recommendations | Example snapshot | Oct 2026

FICTIONAL EXAMPLE

Agenda

- Findings and opportunity
- 90-day plan and resources
- Search and AI evidence
- Existing-site improvements
- Buyer questions and content
- Decisions and next steps

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Opportunity Summary

Executive Summary: LedgerFlow Search & AI Discovery Opportunity

STRATEGIC APPROACH

Auditing discovery where finance software buying decisions occur

We analyzed LedgerFlow's current digital footprint across search engines and leading LLMs (ChatGPT, Gemini, Perplexity) to benchmark baseline visibility, expose discovery gaps, and define a dominant future state across core service categories.

KEY DIAGNOSTIC FINDINGS

74.3%	0.0%	1.2%
Branded Click Share (571 of 801 clicks)	Non-Branded Category Rank	LLM Share of Voice (14 of 1,187 answers)

- **Zero Non-Branded Footprint:** Buyers searching for generic CFF, TM, or API finance solutions do not see LedgerFlow anywhere in search results or generative AI outputs.
- **The Category Content Void:** LedgerFlow currently lacks in-depth content that addresses pressing operational questions: finance resourcing models, ERP integration, and the upcoming 2027 finance rule shifts.
- **Competitor SERP Capture:** Atlas Treasury (Atlas) ranks for **91.9%** of tested CFF queries by maintaining targeted category guides, data-source hubs, and vendor comparison pages.

GROWTH OPPORTUNITIES

- **Full-Funnel Buyer Journey Content:** Structured systematically across **Awareness** (finance need), **Consideration** (industry guidelines & workflow), and **Decision** (vendor comparisons & Treasury Readiness Assessment).
- **Modern Technical Web Foundation:** LedgerFlow's new website site provides the infrastructure and speed to launch a repeatable, templated content model designed to capture high-intent buyers.
- **Reverse-Engineered Competitor Playbook:** Mapped exact structural gaps across Atlas, CashPilot, FlowLedger, and FinSight to position LedgerFlow's connected-finance and financial team model where competitors fall short.

ACTION PLAN

PHASE 1 **0-30 DAYS**

Confirm & Prioritize

Anchor core positioning, resolve website crawl/heading bugs, verify conversion tracking, and prioritize top 8 buyer questions.

PHASE 2 **31-60 DAYS**

Create & Publish

Update 6 priority pages; launch financial Outcomes hub, 2 authoritative finance guides (2027 finance trends briefing), video, and targeted PR.

PHASE 3 **61-90 DAYS**

Scale & Review

Publish follow-up guide, 2nd video, send targeted outreach pitch, and review monthly search & AI citation scorecards.

LedgerFlow's discovery opportunity is to capture non-branded clicks

LedgerFlow Search Data: 571 of 801 clicks (71.3%) came from branded searches
- The remaining current search traffic was not related to service focus areas

AI Search: LedgerFlow was named in 14 of 1,187 answers (1.2%).
- LLM's do not have the information needed in order to recommend LedgerFlow in answers

Opportunity: answer treasury-program and operating questions, then connect readers to LedgerFlow's connected-finance model and Treasury Readiness Assessment.

Action: improve the existing buyer pages and connect them to clear, source-backed guides.

Search: Example Search Console, Illustrative period. AI: U.S., 67 questions that omit LedgerFlow, Illustrative period.

Lead with CFF; explain connected finance

Demand: “cash flow forecasting” and “treasury management” each have 6,600 estimated monthly U.S. searches.

LedgerFlow combines CFF with finance teams, AI and connected treasury operations as part of its broader connected-finance approach.

2027 finance trends: proposed CFF/AP Automation payment would require services furnished by finance staff employed by the finance practice, plus a separately reportable initiating visit.

Content priority: explain CFF within connected finance; include a dated industry briefing with LedgerFlow’s finance and compliance review.

Example SEO dataset U.S./Desktop, Example snapshot. Illustrative 2027 market scenario, proposed 14 Illustrative period; applicability proposed from 1 January 2027.

A customer journey built around customer search behavior

Recommended content journey: explain the need, clarify programs, compare options, then assess fit.

Awareness

Recommended content order

Understand the finance need

what is cash flow forecasting

880

what is treasury management

720

Consideration

Recommended content order

Understand program requirements

cms guidelines for cash flow forecasting

50

what use cases qualify for treasury management

480

Decision

Recommended content order

Explore delivery options

cash flow forecasting solutions

590

cash position reporting software

50

Compare providers and platforms

best cash flow forecasting companies

90

best cash flow forecasting software

110

Guides explain; Platform and audience pages show fit; the Treasury Readiness Assessment is the next step.

Example SEO dataset, U.S./Desktop, Example snapshot. Estimated monthly searches for the displayed terms.

The first 90 days turn findings into useful answers

Days 0–30: anchor the message, prioritize buyer questions, confirm measurement and review current website issues. Preserve the working integration card; assign the legacy-route follow-up.

Days 31–60: update six priority pages; publish Customer Evidence, two guides, the first video, two LinkedIn posts and one press release. Prepare the pitch.

Days 61–90: publish one follow-up article, the second video and two posts. Send the pitch and decide what continues.

Measure separately: content delivered, search visibility, AI mentions, citations and qualified inquiries.

Recommended workload from the 10 September roadmap update. industry review fits within the planned guide and follow-up capacity.

Resource the specific work, then confirm scope

Recommended workload: six priority page updates; Customer Evidence and two guides; one follow-up article; two videos with transcripts; four LinkedIn posts; one press release and one tailored pitch.

LedgerFlow: current product and financial facts, supporting evidence, access, a speaker and timely review.

Strategy Kiln: integrated strategy, copy, SEO and AI-search support, website recommendations, distribution support and measurement.

Decision: confirm company leads, review capacity and the first production wave; scope implementation separately.

Roadmap, Example snapshot | Oct 2026. Homepage messaging remains included. Paid testing requires separate approval and confirmed platform availability.

Use the roadmap to assign and track the work

First 90 days: priorities from the detailed roadmap, updated Example snapshot | Oct 2026.

0–30 DAYS

CONFIRM + PRIORITIZE

Anchor the message, prioritize buyer questions and confirm measurement. Review current site issues and mobile speed. Keep the working patient card; assign legacy-route follow-up.

31–60 DAYS

CREATE

Update six priority pages. Publish Clinical Evidence, two guides, one video, two posts and one press release. Include the dated CMS proposal briefing in the RPM guide; prepare one pitch.

61–90 DAYS

TEST + DECIDE

Publish one follow-up article, a second video and two posts. Send the tailored pitch. Review monthly measures and buyer understanding; decide the next wave at day 90.

The seven tabs connect the executive priorities, action plan, website pages, buyer messages, content schedule, decisions and measurement definitions.

Start with the named actions and review needs; use the monthly scorecard to decide what continues.

Open the detailed 90-day roadmap

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Organic + AI Search

Useful answers support both search and AI discovery approaches

A view of how SEO + AEO relate and how they are different

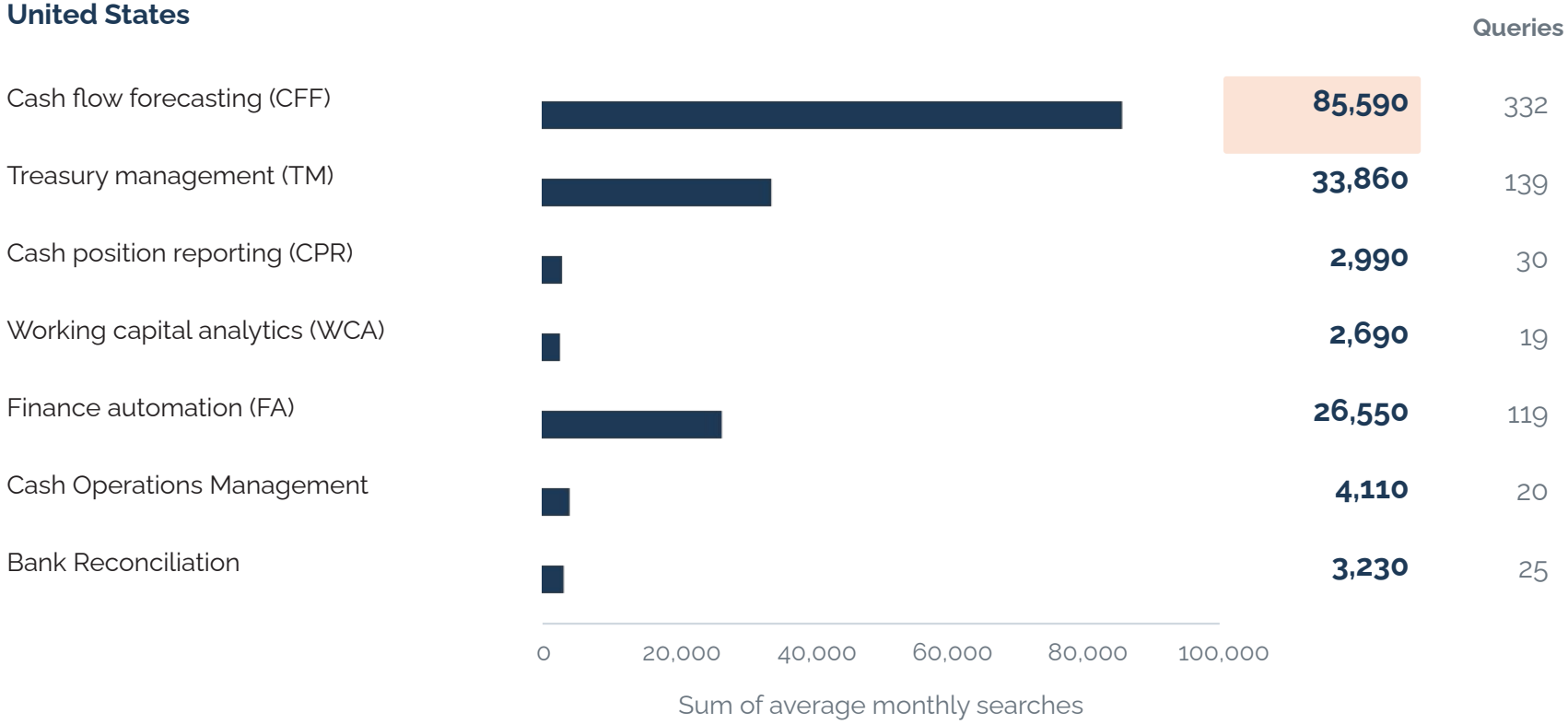
SEO/search: appear in results		AEO: appear in answers
Find and read pages Keep pages accessible and linked	**Make content accessible**	**Use stored or retrieved information** Make current facts easy to find and read
Organize page destinations Organize URLs, sitemaps, internal links	**Organize information clearly**	**Retrieve useful passages** Write passages that explain the answer on their own
Support the page with evidence Show sources, authors and relevant links	**Give readers reasons to trust**	**Support facts across sources** Develop useful, well-sourced outside contributions
Understand the search question Assign related questions to the right page Give each topic a clear destination	**Match to user need**	**Answer related buyer questions** Explain programs, comparisons and practical next steps
Help the reader choose a page Give a clear, useful answer to the search	**Help the reader understand the answer**	**Clear answers and sources** Use direct answers, evidence and relevant next steps
Links + snippets Measure rankings, CTR, organic traffic	**Deliver the answer**	**Combined answer** Measure named answers and citation records separately

Practical comparison: search ranks pages; AI systems combine information differently.

CFF leads the reviewed service-and-code searches

Estimated monthly searches across the reviewed service and code terms.

United States



What the data shows

CFF has the largest summed monthly search volume in the reviewed query set.

The CFF group includes service questions and historical integration-code searches.

Prioritize current finance and operating questions when choosing content.

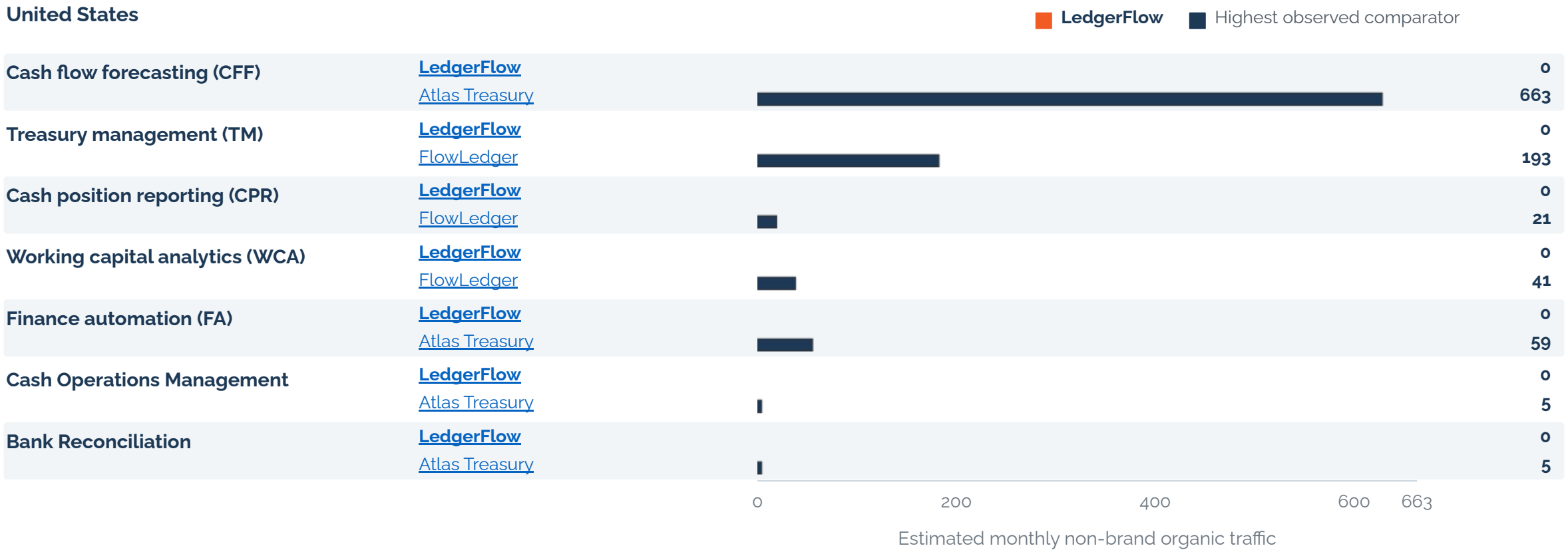
Overlapping service groups; compare each bar separately.

Example SEO dataset, U.S./Desktop, Example snapshot. Reviewed service and code terms across seven domains; average monthly searches.

Competitors capture search visits across finance services

Build clearer service answers where the reviewed competitors already appear.

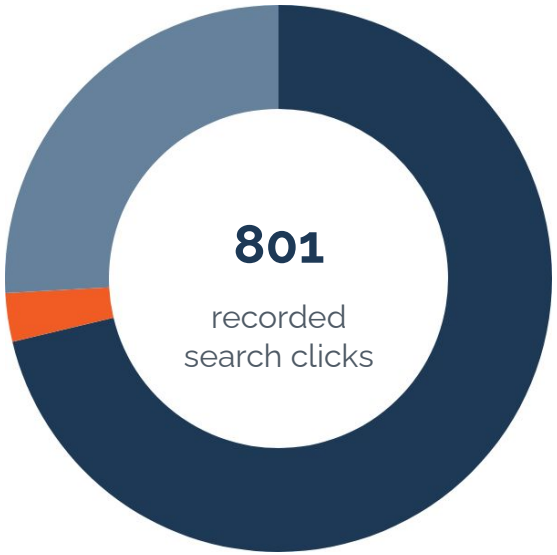
United States



Example SEO dataset, U.S./Desktop, Example snapshot. Estimated monthly non-brand organic traffic from reviewed service terms across seven domains.

Branded searches account for 71.3% of recorded clicks

Grow discovery around finance questions alongside searches for LedgerFlow's name.



Branded searches, excluding financeers

571 | 71.3%

financeer searches

23 | 2.9%

Other searches

207 | 25.8%

23 clicks from financeer searches
2.9% of recorded search clicks

What the search mix shows

Branded searches account for most recorded clicks.

financeer searches have their own category.

Build clearer finance-topic answers and measure their search clicks separately.

Examples from the search export

ledgerflow | 328 clicks

ledgerflow ai | 100 clicks

ledgerflow financeers | 20 clicks

ledgerflow jobs | 2 clicks

ledgerflow app | 18 clicks

beer and diabetes | 16 clicks

Example Search Console query-page export, Illustrative period. Branded search clicks exclude financeer searches.

CFF (Cash Flow Forecasting) searches point to a clear content priority

No recorded LedgerFlow rank for these terms: connect CFF education to Platform and audience pages.

United States

Keyword	Est. monthly searches	KD	LedgerFlow position
cash flow forecasting	6,600	64	**No recorded rank**
cash flow forecasting software	1,300	29	**No recorded rank**
cash flow forecasting platform	1,900	34	**No recorded rank**
cash flow forecasting services	590	38	**No recorded rank**

Example SEO dataset, U.S./Desktop, Example snapshot. Monthly search estimates; KD = difficulty, 0–100; No recorded rank = no recorded organic position.

TM searches deserve clear program answers

No recorded LedgerFlow rank for these terms: explain TM delivery, responsibilities and program fit.

United States

Keyword	Est. monthly searches	KD	LedgerFlow position
treasury management	6,600	21	**No recorded rank**
treasury management software	1,000	17	**No recorded rank**
treasury management program	720	22	**No recorded rank**
treasury management services	590	26	**No recorded rank**

Example SEO dataset, U.S./Desktop, Example snapshot. Monthly search estimates; KD = difficulty, 0–100; No recorded rank = no recorded organic position.

finance questions need current, practical explanations

No recorded LedgerFlow rank for these terms: use current industry sources and finance or compliance review.

United States

Keyword	Est. monthly searches	KD	LedgerFlow position
cash flow forecasting api codes	880	26	**No recorded rank**
cash flow forecasting reconciliation	210	31	**No recorded rank**
treasury management api codes	480	20	**No recorded rank**
treasury management finance	260	17	**No recorded rank**

Example SEO dataset, U.S./Desktop, Example snapshot. Monthly search estimates; KD = difficulty, 0–100; No recorded rank = no recorded organic position.

Workflow searches call for concrete operating detail

No recorded LedgerFlow rank for these terms: explain workflows, information handoffs and confirmed integrations.

United States

Keyword	Est. monthly searches	KD	LedgerFlow position
cash flow forecasting workflow	50	33	**No recorded rank**
cash flow forecasting integration	70	17	**No recorded rank**
cash flow forecasting ehr integration	50	0	**No recorded rank**
treasury management workflow	90	0	**No recorded rank**

Example SEO dataset, U.S./Desktop, Example snapshot. Monthly search estimates; KD = difficulty, 0–100; No recorded rank = no recorded organic position.

Explain CPR and WCA with program-specific sources

No recorded LedgerFlow rank for these terms: explain each program's requirements with its own current sources.

United States

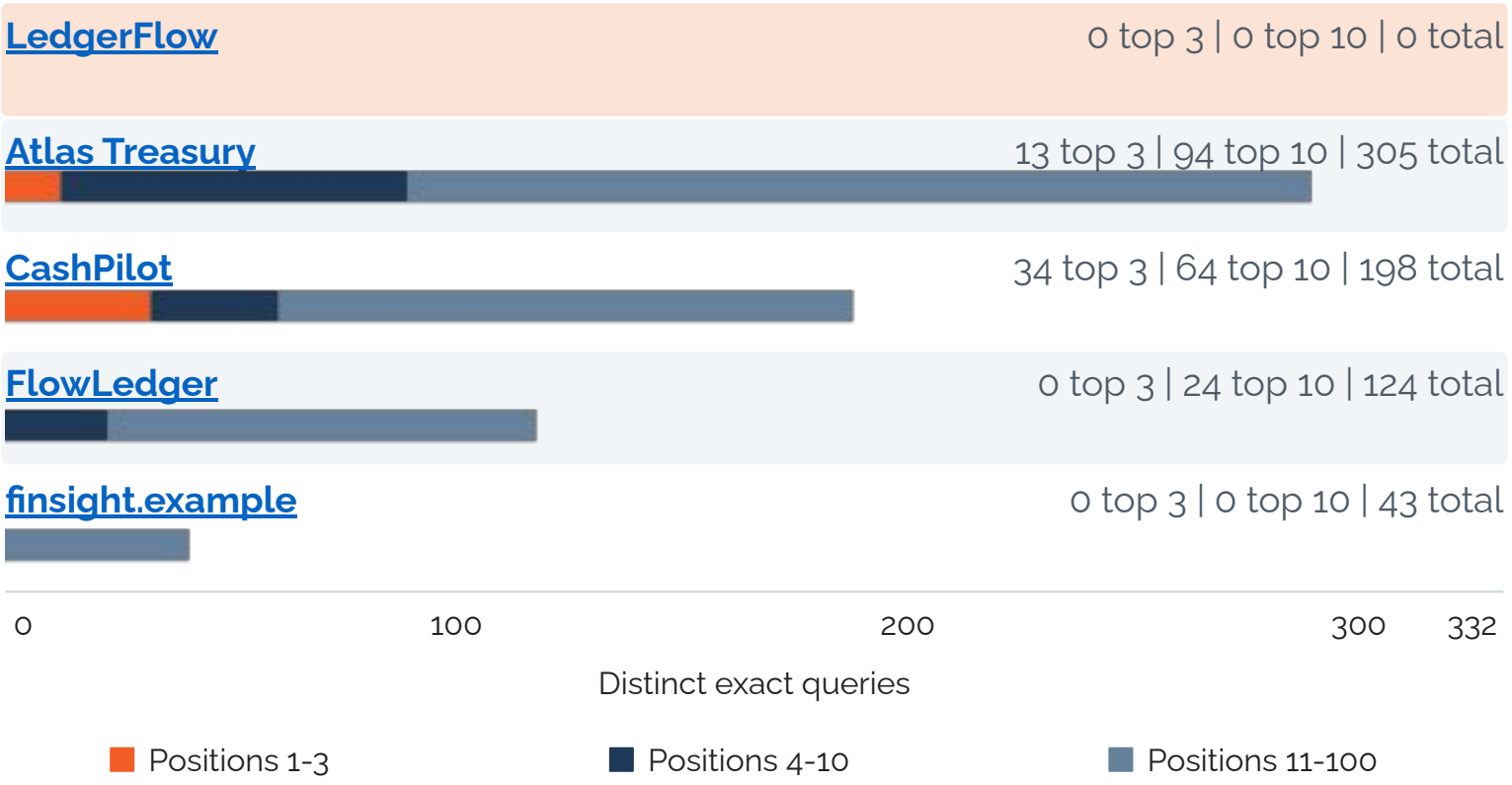
Keyword	Est. monthly searches	KD	LedgerFlow position
cash position reporting finance guidelines	40	17	**No recorded rank**
cash position reporting cms	40	25	**No recorded rank**
apcm medifinance	480	24	**No recorded rank**
apcm reconciliation rates	50	9	**No recorded rank**

Example SEO dataset, U.S./Desktop, Example snapshot. Monthly search estimates; KD = difficulty, 0–100; No recorded rank = no recorded organic position.

Atlas covers 305 of the 332 reviewed CFF searches

Across 332 reviewed queries, Atlas ranks for 305 terms and reaches the top three for 13; LedgerFlow has no recorded organic ranking for these queries.

Reviewed CFF query coverage



What the coverage shows

Atlas reaches 91.9% of the reviewed query set; LedgerFlow reaches 0.0%.

Review the topics and page types that support this broad coverage.

Use the following page examples to inform LedgerFlow's content priorities.

Example SEO dataset, U.S./Desktop, Example snapshot. Organic rankings for 332 reviewed CFF terms; non-overlapping position bands.

Atlas uses different pages for distinct CFF topics

Atlas dedicates pages to category, treasury operations, data-sources and vendor evaluation.

Buyer need	Atlas page example	Estimated monthly organic page traffic (Example SEO dataset Top Pages)	What the page covers
Homepage	Cash flow forecasting & Treasury management | Atlas Treasury	**1,157**	Homepage for CFF and cash management
CFF category guide	Cash flow forecasting: The Complete Guide	**11**	Category guide with definitions and vendor-selection guidance
financial service page	Atlas Operations | CFF & cash management Platforms	**0**	Dedicated financial service page
data-source guide	7 Common Cash flow forecasting data-sources	**1,343**	A data-source-focused educational guide
Vendor comparison page	Cash flow forecasting Company Comparisons	**16**	Dedicated vendor-comparison page

View Atlas page examples

View example: Homepage positioning

View example: Helping to evaluate and compare options

View example: Vendor-selection guidance

Example SEO dataset Top Pages, U.S./root domain, Example snapshot. Estimated monthly organic page traffic. Atlas page examples, Example snapshot.

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U.S. AI visibility

LedgerFlow appeared in 14 of 1,187 AI answers

LedgerFlow was named in 14 of 1,187 answers (1.2%).

Outside websites supplied 12,223 of 12,241 citation records (99.9%).

LedgerFlow-owned pages received 18 citation records across 11 distinct answers.

Google AI Mode	Gemini	Perplexity	Microsoft Copilot	ChatGPT	Google AI Overviews

What this means

Measure named answers and LedgerFlow-page citations separately.

Prioritize useful buyer answers and source-backed references, then repeat the benchmark.

Illustrative U.S. AI tests, Illustrative period. 67 questions that omit LedgerFlow; 1,187 answers.

Eight tested questions reveal practical content jobs

Use these questions to plan useful answers for financial, operational and finance readers.

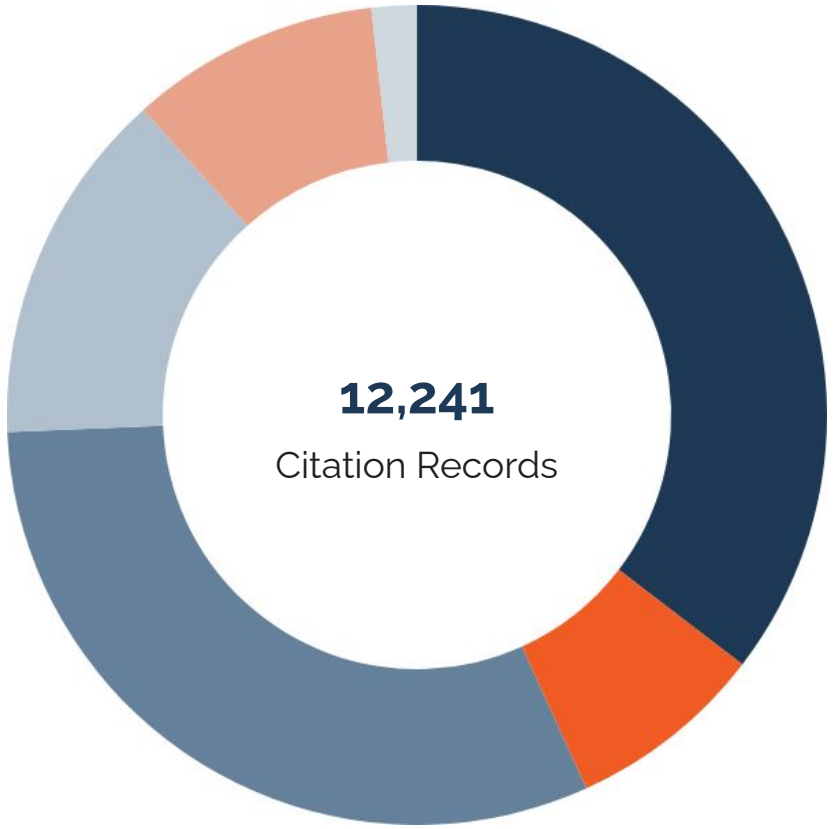
Recommended first priorities: program fit, resourcing and workflow, then dated policy and evaluation detail.

Question topic	Exact tested question	Short focus	Returned answers	Recommended content use
Proposed-rule implications	how could the illustrative 2027 finance remote forecasting changes affect finance teams and cloud finance programs	Proposed 2027 operating requirements	**6**	financial and finance: dated industry section in the CFF guide.
Vendor comparison	compare cash flow forecasting vendors for hospitals	Comparison of hospital CFF vendors	**21**	Operations: evaluation criteria on finance teams and Platform.
reconciliation workflow	treasury management platform with reconciliation workflows	cash-management reconciliation workflows	**18**	Finance: reviewed finance responsibilities on Controllers.
resourcing and systems capacity	how can finance teams scale cash visibility without adding significant staff or new systems	resourcing and systems capacity	**6**	Operations: resourcing and workflow detail on finance teams.
Connected data-sources and finance teams	CFF solution with financial finance teams and connected data-sources	data-sources and financial finance teams	**21**	financial: team and data-source roles in Platform and the CFF guide.
TM platform	treasury management platform for businesses	TM for businesses	**21**	Operations: TM delivery and program fit on Platform.
WCA category	WCA platform for chronic use case management	WCA and chronic use cases	**18**	financial and finance: WCA-specific explanation on Controllers.
Value-based finance support	CFF and TM platform for finance automation performance	CFF and TM in finance automation	**18**	Leadership: program roles and approved evidence on audience pages.

Illustrative U.S. AI tests, Illustrative period. Eight selected questions produced 129 answers within the 67-question, 1,187-answer benchmark.

AI answers in top LLMs cited a broad mix of sources

The cited sources include companies, institutions, publications, reference sites and user contributions.



- **Corporate brands**
  4,334 records | 35.4%
- **Institutional**
  957 records | 7.8%
- **Editorial**
  3,809 records | 31.1%
- **Reference**
  1,717 records | 14.0%
- **UGC**
  1,206 records | 9.9%
- **Other**
  218 records | 1.8%

Press releases as a key opportunity for citation development (written strictly to show up in LLMs)

What the mix shows

Corporate sources were just one part of the evidence mix (35.4%).

Develop useful LedgerFlow pages and well-sourced outside contributions about treasury operations.

Choose outside opportunities for subject relevance, sound evidence and clear editorial standards.

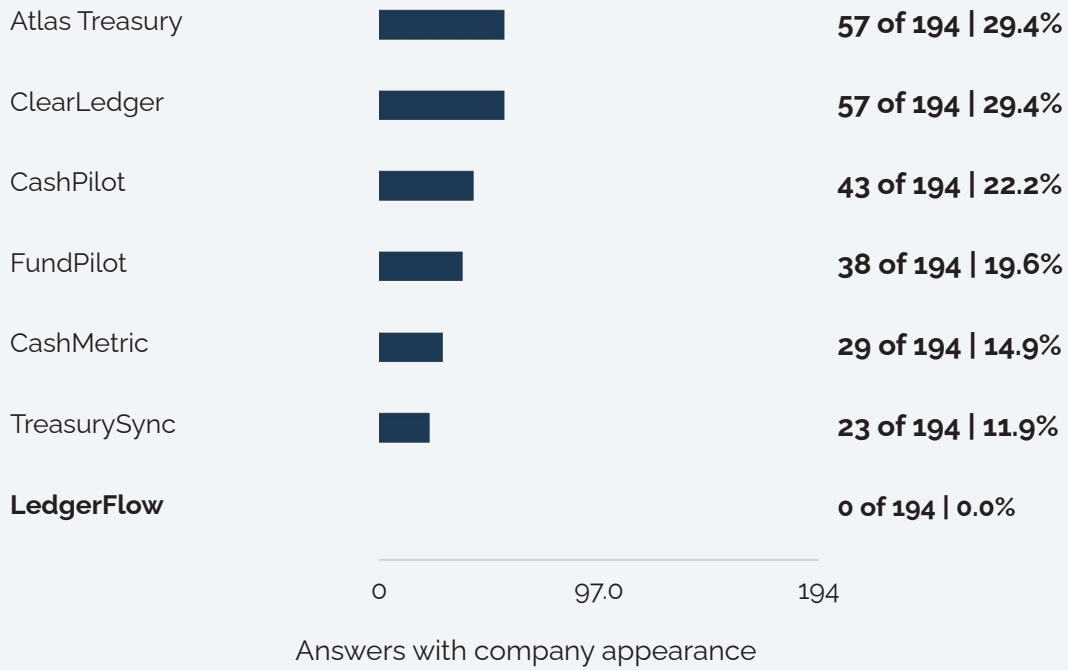
Illustrative U.S. AI tests, Illustrative period. 12,241 citation records across 1,187 answers; source categories as classified.

LedgerFlow was absent from the CFF and TM answer samples

Other companies appeared repeatedly in the tested CFF and TM answers. LedgerFlow appeared in 0 of 194 CFF answers and 0 of 105 TM answers.

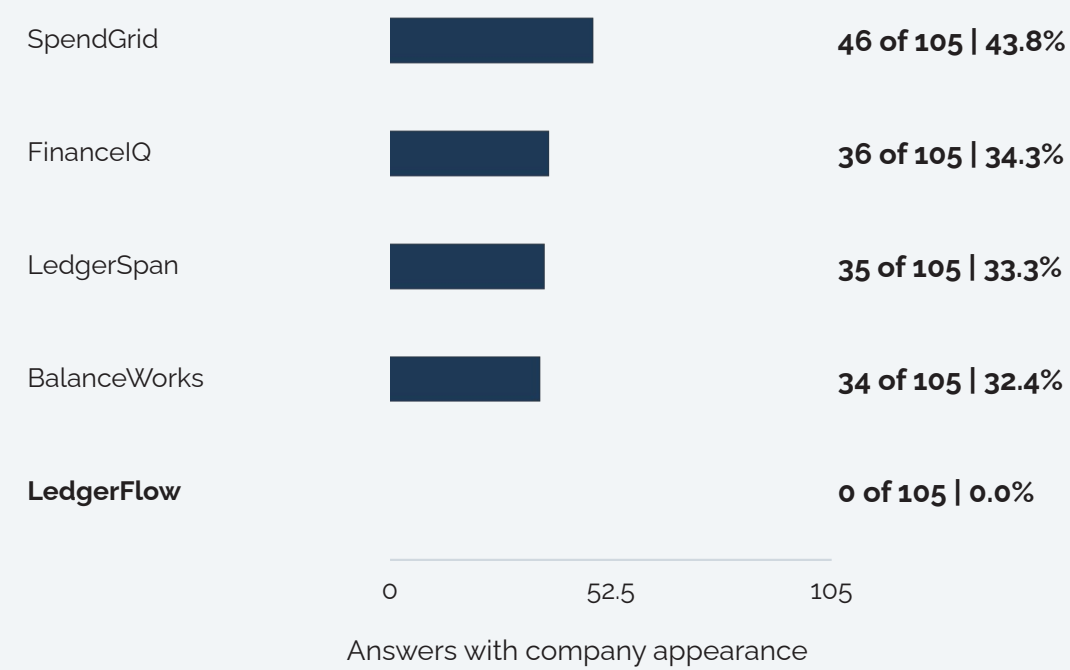
Cash flow forecasting

194 answers from 10 U.S. questions not naming LedgerFlow
Jul 11–25, 2026



Treasury management

105 answers from 5 U.S. questions not naming LedgerFlow
Jul 11–25, 2026



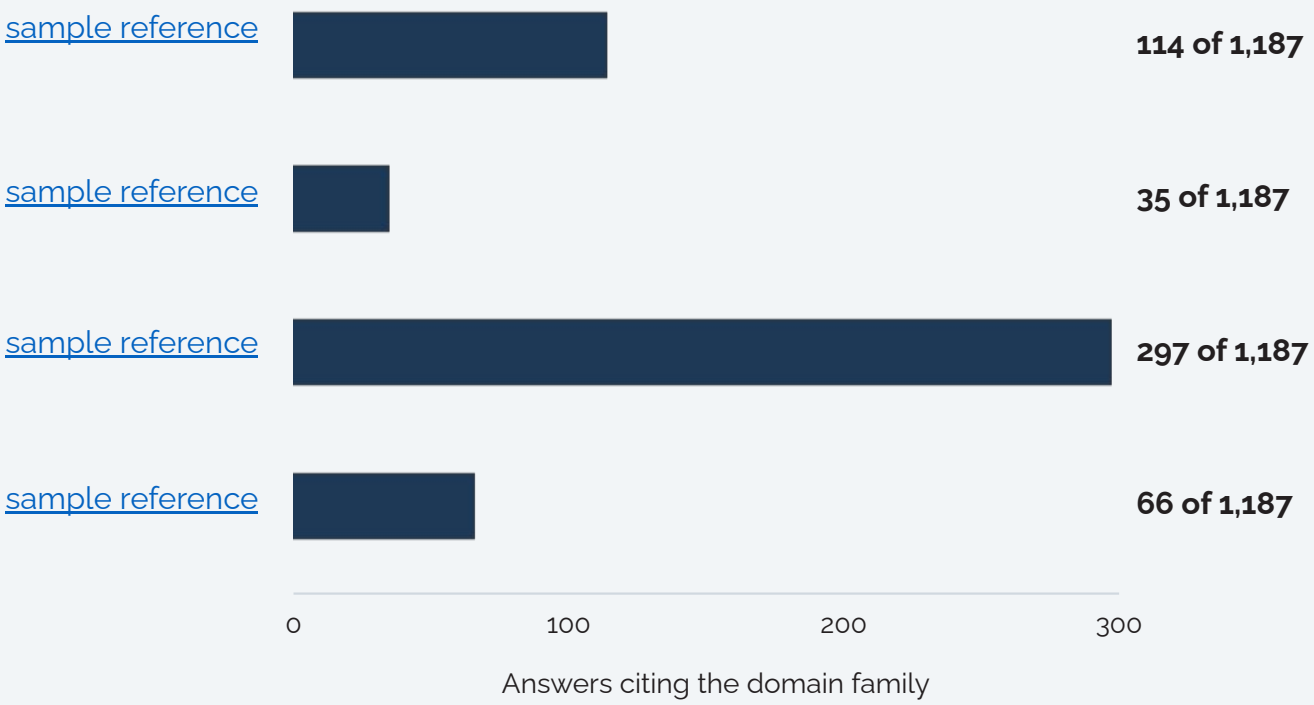
Illustrative U.S. AI tests, 11–25 Illustrative period. Company appearances: CFF, 194 answers/10 questions; TM, 105 answers/5 questions.

Use official sources to explain treasury-program rules

Government sources can provide official rules and guidance.

Connect the applicable rules to practical finance responsibilities and reviewed LedgerFlow facts.

U.S. government domain families



At least one of these four families was cited in 405 of 1,187 answers (34.1%).

What the source counts show

Each family includes the root domain and its subdomains.

Use 405 distinct answers for the combined total across these four families.

Illustrative U.S. AI tests, Illustrative period. Answers citing each government domain family, including subdomains; counts overlap.

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Technical SEO

Confirm shared issues, then fix the responsible component

Check repeated heading output, page connections and search settings in the existing website.

The integration card now reaches its guide. Review the legacy route separately and verify each approved site change.

1

SHARED PAGE COMPONENTS

Identify the responsible heading components first.

27 August: 93/172 news records lacked an initial-HTML H1; check rendered pages.

August checks: Resource Center showed two visible H1s at desktop and mobile widths.

2

LINKS AND DOCUMENT LANGUAGE

Keep the working BankSync card; review the old address that still returns 404.

Add relevant links to existing audience pages.

Set and verify the correct document language.

3

SITEMAP AND VERIFICATION

27 August: one of 273 sitemap requests ended on a noindex page.

Align the coaches route with its agreed indexation intent.

After approved changes: check initial HTML, rendered pages and links.

LedgerFlow initial HTML and rendered-page checks, Illustrative period; crawl dated 27 August UTC. customer-link update: Example snapshot | Oct 2026.

The August sample prioritizes news-heading review

Review rendered news headings first. 10 September: the BankSync card reaches its guide; the legacy address still returns 404.

Four selected on-site URL families; Aug 27, 2026 initial HTML

Page signal	News records (172)	Blog articles (78)	On-site core / hubs (13)	customer programs / support (6)
Broken internal links	0/172 (0.0%)	0/78 (0.0%)	0/13 (0.0%)	**1/6 (16.7%)**
No nonempty H1 in initial HTML	93/172 (54.1%)	0/78 (0.0%)	0/13 (0.0%)	1/6 (16.7%)
No meta description in initial HTML	0/172 (0.0%)	0/78 (0.0%)	0/13 (0.0%)	0/6 (0.0%)
Duplicate page title in initial HTML	30/172 (17.4%)	1/78 (1.3%)	0/13 (0.0%)	0/6 (0.0%)

LedgerFlow initial-HTML crawl, Example crawl UTC. Counts and rates use each family's eligible requested URLs.

Give each buyer question a clear path through LedgerFlow's site

Answer the finance question first, explain who does the work, and link to evidence and the relevant next step.

Recommendations:

1. Route relevant service entry topics into the existing solution and audience pages.
2. Preserve established customer and program routes, separate from organizational conversion.
3. Improve the existing Resource Center navigation and links to relevant audience pages.
4. Clarify current workflow and implementation steps on the existing pages.
5. Explain the existing connected-finance wording through the operating model and approved evidence.
6. Explain each program's job and who it serves, then show how the finance model connects.
7. Replace generic claims with verified process explanations and approved proof on existing pages.
8. Use the existing guide to support the existing strategy-assessment next step.

LedgerFlow site review, Example crawl; priority-page and link checks, Example snapshot | Oct 2026. Recommended existing-page improvements.



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Messaging

Answer the questions that help buyers understand finance

what business outcomes should finance teams expect from cloud finance programs

how can finance teams scale cash visibility without adding significant staff or new systems

what should finance teams look for in a longitudinal cash visibility platform

how can businesses deliver working capital analytics at scale

how can finance teams support customers between visits

how to reduce gaps in cash visibility between appointments

how can finance teams improve customer engagement in CFF programs

what is connected finance infrastructure in finance

how can finance teams combine AI and finance teams for cash visibility

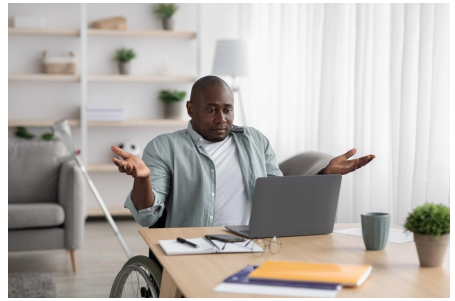
how can CFOs improve chronic use case outcomes with cloud finance

how can finance teams generate ROI from cloud finance programs

how can finance teams improve outcomes in finance automation with cloud finance

How does LedgerFlow integrate with existing ERPs and workflows?

What use cases does LedgerFlow support?



Understand the finance need

Evaluate the approach

First: resourcing and workflow. Next: program fit and evidence.

Illustrative U.S. AI-test questions, Illustrative period; LedgerFlow Platform FAQ, Example snapshot. Recommended content sequence.

Connect the finance question to LedgerFlow's operating model

Start with familiar finance questions, then explain how LedgerFlow's finance teams, AI and delivery model work together.

1

Use the CFF guide to explain forecasting within connected finance.

2

Show responsibilities and information handoffs on Platform.

3

Use audience pages to explain program fit and the Treasury Readiness Assessment.

4

Explain AI-supported tasks and financial decisions in the AI and finance teams guide.

5

Support relevant claims with Customer Evidence and current policy sources.

6

Check buyer understanding and use the monthly scorecard to refine the content.

LedgerFlow guide, May 2026; public pages, Example snapshot. Recommended content work.

Help buyers compare who does the work

Compare finance responsibilities, resourcing, workflows, implementation and evidence across the approaches buyers are considering.

- Describe the published breadth of CFF and cash-management programs.
- Explain the operational roles behind adoption.
- Show how finance teams review forecasting information and support follow-up.
- Keep businesses and finance teams at the center.
- Explain program responsibilities and requirements with qualified evidence.
- Show how the offer is designed to complement existing financial operations.

Published operating choices:

Atlas:

financial workflow, logistics and forecasting support, in this example.

CashPilot:

Buyer-led, vendor-led or shared operations; ERP workflow depends on integration depth.

FlowLedger:

Managed cloud finance and provider-approved escalation protocols, in this example.

FinSight:

financial AI, customer requests and escalation to the practice, in this example.

In-house/existing finance operations:

An operating alternative; explain which work stays with the organization and which work LedgerFlow supports.

LedgerFlow, Atlas, CashPilot, FlowLedger and FinSight illustrative operating profiles, Example snapshot.

Competitor messages emphasize resourcing and treasury operations

Operating burden and resourcing	financial operating roles and support	Connected finance workflows
"Streamline financial workflows to reduce burnout and stabilize resourcing" **— Atlas Treasury** Cash flow forecasting & Treasury management | Atlas Treasury	"Equip your analysts with expertly crafted operational workflows, financial playbooks, and training" **— Atlas Treasury** Atlas Operations | CFF & cash management Platforms	"Out-of-the-box integrations with every ERP platform" **— Atlas Treasury** Cash flow forecasting & Treasury management | Atlas Treasury
"Run it yourself, hand it to our financial team, or anything in between." **— CashPilot** Cash flow forecasting Platform & Companies | CashPilot	"Provider-approved escalation protocols" **— FlowLedger** Cash flow forecasting (CFF) | cloud finance Platform — FlowLedger Health	"Works inside your ERP or the standalone CashPilot portal — depending on your integration depth." **— CashPilot** Cash flow forecasting Platform | CashPilot
"Trusted by 20+ finance teams to unlock capacity, without headcount." **— FinSight** financial AI for cash visibility	"Our team triages alerts and requests from your customers, escalating to your practice only as needed, minimizing inbox fatigue." **— FinSight** analysts | FinSight	"Fully Managed cloud finance, Mapped To Your Goals" **— FlowLedger** FlowLedger Health - The Leader In Remote finance

Atlas, CashPilot, FlowLedger and FinSight public pages, Example snapshot. Attributed sample vendor statements.

Atlas explains cloud finance through practical buyer concerns

Atlas Treasury: illustrative quotation excerpts

Themes	Atlas messaging
Category and scale	finance at Home with the Leader in Enterprise Remote customer finance
Operational burden	Streamline financial workflows to reduce burnout and stabilize resourcing
ERP workflow	Out-of-the-box integrations with every ERP platform
reconciliation support	1:1 reconciliation consultation to help you increase the ROI of your CFF program
Logistics ownership	Complete logistics and inventory management service owned by Atlas
Performance reporting	Identify program inefficiencies
Next step	Book a Meeting
financial roles and coverage	Augment your finance staff with 24/7 financial forecasting and triage through financeConnect™
Implementation enablement	Equip your analysts with expertly crafted operational workflows, financial playbooks, and training
customer participation	Designed at a 2nd-grade reading level and available in multiple languages to support financial literacy
use case-specific configuration	Easily launch and scale your program with 90+ out-of-the-box financial presets
Technical support boundary	Rest easy with 24/7 technical support to address any technical issues or challenges

Atlas homepage and financial page, Example snapshot. Twelve attributed sample vendor statements.

Four content jobs make connected finance concrete

CFF within connected finance

Explain forecasting, follow-up and the broader finance relationship.

Content destination:

CFF and connected finance: How They Fit Together, linked to Platform and audience pages.

AI and financial responsibilities

Show AI-supported tasks, financial decisions and information handoffs.

Content destination:

How AI and finance teams Work Together, supported by current product and financial facts.

Evidence buyers can evaluate

Present each result with its population, method, period and source.

Content destination:

Customer Evidence and Outcomes, linked from the pages where each result matters.

Proposed 2027 CFF changes

Explain proposed practice resourcing and initiating-visit requirements for CFF and AP Automation.

Content destination:

Dated section in the CFF guide; use the planned follow-up article for updates after finance and compliance review.

LedgerFlow roadmap, Example snapshot | Oct 2026 update. Recommended page and guide assignments.

Agree on the first wave and the support it needs

Confirm the six priority page updates, Customer Evidence and the two named guides.

Prioritize industry thought leadership to build credible visibility

Assign company leads, source inputs and review capacity; scope implementation separately.

Use the monthly scorecard and day-90 review to decide what continues.