

AI won't replace FP&A. It will elevate it.

WHY AI COMPLEMENTS FINANCIAL PLANNING & ANALYSIS
AND MAKES THE PLATFORM MATTER MORE



UNIT4

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Executive summary

AI won't eliminate Financial Planning & Analysis. It will elevate it. The real question isn't whether FP&A survives. It's how fast your function evolves to capture the value AI makes possible and whether your platform can carry that intelligence at scale.

The real shift moves from manual, repetitive work, such as: data rekeying, reconciliations, spreadsheet wrangling, narrative drafting, toward higher-value work: decision support, scenario design, trade-off conversations, risk sensing, and performance management. AI will become pervasive across the planning value chain, from data inception in ERP and operational systems through modelling and forecasting to guided decision-making and performance execution.

People remain central to this future. Accountable judgment, governance, context, and trust don't automate. The strongest FP&A teams will pair AI-enabled speed with human-led oversight and communication.

This paper sets a pragmatic AI+FP&A agenda for leaders: clarify what FP&A is (and isn't), define where AI adds measurable value, invest in data foundations and governance, redesign roles and operating rhythms, and build trust through controls, transparency, and adoption.

The opportunity is significant, but so is the challenge. Organisations that move early will accelerate cycle times, improve forecast accuracy, and elevate the finance function's influence. Those that don't risk being outpaced.



FP&A is evolving with AI, not disappearing

Confusing a change in tools with a change in purpose is easy to do. The motor car didn't end transportation. It revolutionised it. The objective, moving people and goods, remained. The mechanisms, speed, and economics changed dramatically.

FP&A follows the same trajectory. Every time a new computing paradigm appears, the same "obsolescence" narrative surfaces. It never holds. The discipline evolves, absorbs new capabilities, and becomes more valuable. AI represents the next step in FP&A's maturity curve: moving from labour-intensive production of plans and reports to faster, more continuous, decision-oriented performance management.



What FP&A is

And why it's misunderstood

Financial Planning & Analysis (FP&A) is the set of capabilities that help leaders allocate resources, understand performance, anticipate future outcomes, and make trade-offs. It combines financial expertise with business understanding to translate strategy into plans, monitor execution, and guide decisions through insights, scenarios, and performance management.

Less experienced stakeholders often mislabel FP&A as “reporting.” Reporting matters, but FP&A's value isn't in producing a pack. It's in enabling better decisions: framing options, quantifying impacts, stress-testing assumptions, and creating the management cadence that turns data into action.

FP&A vs. Business Intelligence:

Complementary, not nonpeting

Business Intelligence (BI) primarily describes and explores what happened through curated data models, dashboards, and analytical views. FP&A focuses on deciding what to do next: planning, forecasting, scenario design, and performance management, using BI and other sources as inputs.

- **BI tends to answer:** What happened? Where did we deviate? Which segment changed? BI also operates at a more granular level, spanning data mining, process mining, event processing, benchmarking, and sentiment analysis.
- **FP&A tends to answer:** What should we do? What are our options? What if volumes drop 5%? How do we fund growth? What trade-offs optimise margin, cash, and risk?

The technology platforms are typically different: BI tends to be disk-intensive and memory-resident, while most FP&A tools run in-memory to support fast, on-the-fly calculations.

FP&A, EPM, BPM, CPM: similar goals, different lenses

Terminology varies by industry and vendor, and labels are often used interchangeably. The nuance matters less than the outcome: a disciplined, scalable way to plan, forecast, manage performance, and support decisions.

- **FP&A:** the finance-led capability for planning, forecasting, analysis, and decision support.
- **EPM (Enterprise Performance Management):** the broader discipline and enabling technologies used to translate strategy into plans, track outcomes, and drive corrective action across the enterprise.
- **BPM (Business Performance Management):** a management approach emphasising performance measurement, management rhythms, and continuous improvement.
- **CPM (Corporate Performance Management):** commonly used as a synonym for EPM, sometimes with a finance-centric emphasis.

What AI changes in FP&A

1. Less manual effort, a different definition of “cycle time”

AI will materially reduce the hidden factory inside many finance teams: rekeying, reconciling, mapping, correcting, formatting, and chasing inputs. This doesn't remove accountability. It changes how work gets performed and where people spend their time.

- Automated data capture, classification, and enrichment.
- Exception-based reconciliations and anomaly detection instead of manual sampling.
- Drafting management narratives and commentary with traceable links back to drivers.
- Faster consolidation of assumptions and inputs across business units.
- Automated variance explanations and driver analysis as a starting point, not the final answer.

2. More continuous planning, forecasting, and scenario thinking

As forecasting and modelling become more automated, FP&A can move from periodic, calendar-driven cycles to more continuous and event-driven updates. The goal isn't to “forecast more” for its own sake, but to sense changes earlier, quantify impacts faster, and support decision-making while choices still exist.

3. Roles will evolve: from producers of numbers to stewards of decisions

Human interaction with FP&A processes won't disappear. It will evolve. AI can generate options and surface patterns, but leaders still need accountable judgment: setting objectives, selecting trade-offs, managing risk, and aligning stakeholders. The strongest FP&A teams will pair AI-enabled speed with human-led governance, context, and communication.

The human factor

Why people remain central

AI changes what FP&A teams do. It doesn't remove the need for people. Four dimensions explain why.



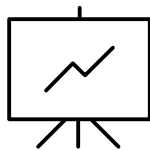
Accountable judgment

Leaders set objectives, select trade-offs, manage risk, and align stakeholders. AI generates options and surfaces patterns. Humans make the decisions that count.



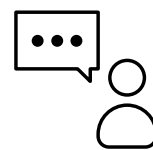
Governance and oversight

Human-in-the-loop controls, explainability standards, and clear accountability chains matter more in an AI-enabled environment, not less. Every AI output must be challengeable, auditable, and owned.



Context and interpretation

Organisational knowledge, stakeholder dynamics, and strategic intent can't be replicated by AI. Human nuance shapes how insights become actions. A model can tell you revenue is trending down. A person understands why the board needs to hear about it differently than the regional director.



Trust and communication

FP&A credibility rests on humans standing behind the numbers. Transparent assumptions, clear narratives, and audit-ready traceability build lasting trust. Without that human layer, AI outputs lack the organisational legitimacy needed to drive real change.

Where AI creates measurable value in FP&A

AI in FP&A delivers the most value when it reduces latency (time from signal to decision), improves decision quality (better options and trade-offs), and increases trust (strong controls and traceability). The following use cases are widely applicable across industries.

Predictive and prescriptive decision support

AI moves FP&A from answering “what might happen?” to “what should we do now?” by combining statistical methods, machine learning, and prescriptive reasoning.

- **Adaptive, driver-based forecasting:** Forecasts learn from historical patterns and continuously update as new operational and commercial data arrives.
- **Hierarchical and probabilistic forecasting:** Consistent roll-ups across products, regions, channels, and entities, with outputs expressed as ranges and confidence levels rather than single-point estimates.
- **Autonomous scenario generation and prioritisation:** AI generates and ranks scenarios based on probability, materiality, and controllability, not just best- and worst-case outcomes.
- **Prescriptive recommendations with trade-off analysis:** Suggested actions (e.g., pricing changes, spend reallocation, hiring timing) with quantified impacts on cash, margin, growth, and risk.
- **Dynamic business steering:** Near real-time forecasts that respond to leading indicators, directly connecting operational signals to the financial outlook.

Continuous planning and resource orchestration

- **Real-time capital and resource reallocation:** Budgets, headcount, and investments dynamically adjusted based on performance, pipeline health, and strategic priorities.
- **Constraint-aware optimisation:** Plans optimised against real-world constraints such as cash availability, capacity limits, service levels, and talent scarcity.

- **Automated re-planning triggers:** AI detects threshold breaches and initiates re-planning without manual intervention.

What-if analysis and scenario design

- **Rapid scenario creation:** Price/volume/mix, headcount, supply constraints, productivity, and capacity scenarios generated quickly with transparent assumptions.
- **Sensitivity analysis at scale:** Identification of the levers that matter most and areas where decisions will have limited impact.
- **Natural-language interaction:** Leaders ask questions in business terms and receive quantified, model-consistent answers without needing technical expertise.

Optimisation and prescriptive analytics

- **Resource allocation optimisation:** AI maximises objectives such as margin, cash, growth, or service outcomes under operational and financial constraints.
- **Working capital optimisation:** Inventory and receivables/payables levers optimised with explicit trade-offs between service, cost, and risk.
- **Portfolio and investment prioritisation:** Consistent scoring, scenario testing, and governance applied across products, customers, geographies, and initiatives.



Behavioural and commercial insight

- **Customer, seller, and partner behaviour modelling:** Linking buying patterns, discounting behaviour, and sales activity to future revenue, margin, and churn risk.
- **Early-warning indicators from weak signals:** Detection of emerging risks or opportunities from subtle changes in usage, sentiment, or operational behaviour, before they appear in KPIs.
- **Causal analysis over pure correlation:** Identifying likely drivers of performance changes to improve executive discussion quality.

Risk, resilience, and disruption management

- **Forward-looking risk modelling:** Continuous assessment of macroeconomic, market, supplier, and regulatory risks with quantified financial exposure.
- **Stress-testing at scale:** High-volume testing across hundreds of assumptions, including FX, interest rates, demand shocks, and cost inflation.
- **Resilience scoring of plans and strategies:** Evaluating how robust plans are under uncertainty, not just their expected return.

Anomaly detection, controls, and finance operations

- **Advanced anomaly detection:** Identification of unusual postings, patterns, and reconciliations to support stronger controls and faster close cycles.
- **Exception-based workflows:** Teams focus on what has changed, what is material, and what is risky rather than routine processing.
- **Improved auditability and traceability:** Clear lineage of data transformations, assumptions, and models to support transparency and trust.

Narrative, executive communication, and operating model transformation

- **Automated, audience-aware narratives:** First-draft commentary for performance packs tailored to Board, ELT, or regional audiences, linked directly to underlying drivers.
- **Guided insights and hypothesis generation:** AI proposes potential explanations for analysts to validate and refine.
- **Meeting-ready decision support:** Clear options, quantified trade-offs, risks, and required actions, all presented in an executive-ready format.
- **AI-augmented FP&A productivity:** Automation of data preparation, variance explanations, and scenario mechanics, allowing analysts to focus on judgment and influence.
- **Institutional knowledge capture and self-optimising models:** Learning from historical assumptions, decisions, and outcomes, with models that adapt over time as drivers change.

Foundational enabler: ethical, governed, and explainable ai in finance

- **Explainable AI:** Clear logic behind forecasts, recommendations, and anomaly detection.
- **Bias and assumption detection:** Identification of systematic bias in data, assumptions, or decision patterns.
- **Governance by design:** Embedded controls ensuring AI outputs align with policy, compliance requirements, and organisational risk appetite.

AI is not a feature

It's a layer across the performance system

To deliver value, AI can't sit only at the end of the process as a copilot for reporting. It must be pervasive across the entire platform. This starts with how transactional data is captured, classified, and enriched within ERP and operational systems. It extends through data quality, master data management, and process consistency. It continues into planning models, forecasting, and optimisation. And it must surface directly inside decision workflows that help leaders act with confidence.

Without strong foundations, AI doesn't create better decisions. It accelerates existing confusion and reinforces weak assumptions at greater speed and scale.

A practical example of cross-platform AI in action: An AI layer connected across ERP, FP&A, HCM, and procurement can access detailed transactional and behavioural patterns continuously purchasing patterns, supplier reliability, payment terms, delivery delays, cost volatility, and demand signals. These insights feed directly into forward-looking planning models.

Now consider this correlated with external signals. AI monitors macroeconomic indicators, geopolitical developments, commodity prices, and sentiment data. It identifies that a critical supplier in a specific country is becoming a potential breakpoint due to rising political tension. Because the platform understands the organisation's detailed procurement history, contractual exposure, volumes, and substitution options, it can immediately assess risk and quantify impact.

The system proactively evaluates alternatives supplier diversification, nearshoring, changes in order volumes, inventory buffering — and calculates the financial consequences of each option: cost increases, working capital impact, service level risk, and margin exposure. It spins up multiple optimised forward-looking scenarios that balance cost, resilience, and operational feasibility.

Leadership sees a clear, high-level overview of the situation, the risk, and a curated set of viable response scenarios. From there, decision-makers can immediately run further what-if questions in real time. Answers arrive at the speed of the organisation, grounded in real data, transparent assumptions, and continuously updated signals.

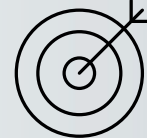
In this model, AI isn't an after-the-fact commentary tool. It becomes an integral part of how the organisation senses risk, evaluates options, and steers the business forward with confidence.

Key considerations



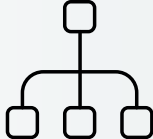
Data readiness

Inconsistent master data, weak lineage, and delayed availability reduce model reliability.



Governance and controls

Finance needs auditable, explainable outcomes, not opaque outputs.



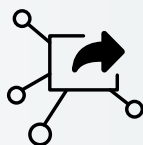
Operating model friction

Unclear ownership between finance, IT, and the business stalls progress.



Skills shift

Teams need more analytics literacy, product thinking, and stakeholder management.



Trust and adoption

If users don't trust outputs, they'll revert to spreadsheets and manual workarounds.



Risk management

Privacy, security, bias, and model drift must be managed as first-class concerns.

AI won't replace FP&A solutions or products

AI won't replace the need for a modern FP&A solution or product. It reinforces the importance of a scalable, high-performance FP&A platform natively connected to ERP and operational processes.

AI isn't something that sits alongside FP&A software. It must be embedded across the platform to be effective. Advanced FP&A use cases: continuous planning, scenario orchestration, optimisation, and prescriptive decision support. All depend on a strong underlying foundation. That foundation is a unified ERP and FP&A platform that provides consistent data, financial integrity, governance, and performance at scale.

AI on its own doesn't deliver trusted outcomes. Without an enterprise-grade FP&A solution underneath, AI lacks context, control, and accountability. Outputs become disconnected from how the organisation actually operates, difficult to reconcile, and impossible to govern. AI doesn't reduce the need for FP&A technology. It increases the importance of choosing the right platform.

What changes significantly is how users interact with the FP&A solution. Historically, FP&A tools have required users to do much of the heavy lifting: defining models, configuring drivers, managing assumptions, running scenarios, explaining variances. AI transforms this interaction model. The FP&A solution remains the system of record and control for planning and performance. AI becomes the intelligence layer that activates it. Users shift from operating the system to working with it.

This is a fundamental change in experience, not a replacement of the product.

AI doesn't commoditise FP&A. It does the opposite

FP&A can't be commoditised because every organisation plans and operates differently. Differences in business model, service delivery, workforce structure, regulatory environment, and strategic priorities all shape how planning needs to work. These differences are particularly pronounced in people-centric organisations.

AI doesn't remove this variability. It amplifies it.

What AI does enable is faster and more intelligent configuration of FP&A solutions to the specific needs of each organisation. Instead of months of manual setup, AI can propose model structures, identify appropriate drivers, adapt dimensions, and refine assumptions based on how the organisation actually behaves across ERP and operational processes. This dramatically accelerates time to value without forcing organisations into generic approaches.

Differentiation moves away from who can deliver a static model fastest, toward who can support ongoing change at scale.

Handling the “we have AI” objection

When prospects or internal stakeholders argue that AI replaces the need for FP&A software, these are the most common objections and how to reframe them.

Objection	Reframe
“ChatGPT / Copilot can do forecasting. Why a separate tool?”	General-purpose AI has no concept of driver logic, allocation rules, or intercompany eliminations. A governed, multi-dimensional planning engine with calculation, workflow, and full audit trail is not a chatbot. You wouldn't run your GL in ChatGPT. Planning deserves the same rigor.
“AI will automate everything FP&A software does. Just a matter of time.”	AI automates tasks within FP&A. It doesn't replace the system. Forecasting uses a calculation engine, scenarios use a data model, consolidation uses entity structures. The more AI automates, the more the platform matters.
“We can build what we need with Excel and AI. Cheaper and more flexible.”	Excel with AI produces excellent one-off analysis. It can't deliver enterprise-scale planning: multi-user collaboration, version control, security, or real-time consolidation. AI doesn't solve Excel's structural limits.
“We already have BI dashboards with AI. That covers our FP&A needs.”	BI answers what happened. FP&A answers what to do next. Replacing FP&A with BI is like replacing your steering wheel with a rearview mirror.
“AI agents will replace FP&A analysts, so the software becomes irrelevant.”	AI changes what analysts do, not eliminates them. Analysts shift from data wrangling to decision stewardship: challenging assumptions, validating outputs, translating insights into action. Human judgment is the irreplaceable element.
“Our CFO says AI will reduce software costs. FP&A tools are on the cut list.”	AI reduces cost by eliminating manual effort within FP&A, not by eliminating FP&A technology. Automated analysis, AI narratives, and continuous forecasting all require a platform. Cutting FP&A software is like canceling your factory to save on electricity.
“A competitor has a more exciting AI roadmap.”	Ask what “exciting” means in practice. Many competitors bolt AI onto individual modules as point features. Unit4 embeds intelligence across the entire platform: ERP, FP&A, HCM, procurement. Cross-platform intelligence is where real value compounds.

The Unit4 platform advantage

Pervasive intelligence

AI spans the entire Unit4 landscape: ERP, FP&A, HCM, and procurement. It's not confined to planning boundaries. Cross-platform context means richer insights and more relevant recommendations. This is where value compounds and where the cross-sell motion with ERP, FP&A, and HCM creates a genuine differentiation.

People-centric by design

Unit4 is built for service-centric, people-intensive organisations where planning complexity comes from workforce, projects, and service delivery. AI amplifies contextual understanding rather than applying a generic model to an organisation it doesn't understand.

Embedded, not bolted on

AI is woven into every layer: data capture, modelling, guided decision-making. Users shift from operating the system to working with it. Governance and human oversight are built in, not added later.

An AI+FP&A agenda to catch up and keep up

Winning organisations treat AI in FP&A as an ongoing strategic programme, not an experiment. A practical agenda centres on measurable outcomes, strong foundations, and deliberate change.

1

Start with decisions, not data:

Define the executive decisions to improve (e.g., pricing, capacity, investment, cost-to-serve, cash) and the metrics that prove value.

2

Build data foundations:

Strengthen master data, lineage, and quality controls so models have reliable inputs.

3

Modernise the planning models:

Simplify drivers, standardise hierarchies, and design for scenarios and continuous updates.

4

Embed AI into workflows:

Integrate forecasting, anomaly detection, and narrative support directly into the planning and performance cadence.

5

Redesign roles and skills:

Shift capacity from production to partnering; build analytics fluency, model governance, and storytelling.

6

Govern for trust:

Implement model risk management, explainability standards, human-in-the-loop controls, and clear accountability.

FP&A platform evolution

A five-stage roadmap

This roadmap shows how a finance organisation can evolve from a system of record to a system of decision. Each stage strengthens the planning backbone, then progressively adds intelligence, automation, and decision impact.

Stage 1: establish the digital FP&A foundation

Objective: make the platform AI-ready

Primary value
Trust, performance, consistency

Reliability and modernisation come first. The focus is clean integration, governed data, and technology that performs at scale. AI appears incrementally, lifting quality and reducing noise.

Key priorities:

- Consistent, reconciled financial and operational data through clean integration between ERP and FP&A
- Reduced data latency and improved refresh cycles to support more timely planning

- Scalability and performance optimised to handle growing data volumes and complexity
- Clear auditability, lineage, and controls built into the planning layer

AI role: Targeted augmentation in low-risk areas, including: anomaly detection, classification, assisted variance explanations, and draft narrative reporting.

Outcome: A reliable, governed FP&A platform that finance teams and the business trust. This stage removes friction and prepares the foundation for intelligence at scale.



Stage 2: AI-augmented core planning and forecasting

Objective: improve insight and responsiveness

Primary value
Better forecasts, earlier signals

With the foundation in place, AI starts to change the day-to-day. Forecasting becomes faster, more granular, and more responsive, without abandoning finance control.

Key priorities:

- Embedded AI interface that understands and highlights hidden data behaviours for forward-looking plans
- Higher-frequency recalculation and partial refresh without performance degradation

- Improved handling of behavioural signals from ERP and operational processes

AI role: Machine learning augments driver-based forecasting using historical and behavioural patterns. Probabilistic forecasts with ranges and confidence levels. Guided analytics that surface outliers, trend breaks, and emerging risks.

Outcome: FP&A becomes more forward-looking and adaptive. Plans remain governed and finance-led, but insights arrive faster and with greater relevance.

Stage 3: embedded scenario intelligence and what-if at speed

Objective: make FP&A decision-ready

Primary value
Agility, clarity, speed

Scenario planning stops being a specialist exercise and becomes a default mode of operating. The platform makes trade-offs visible quickly, so leaders can act while there's still time to act.

Key priorities:

- Scenario orchestration across financial and operational dimensions
- Transparent assumption management linked to shared data and drivers

- Reusable and modular model components to support rapid iteration

AI role: Rapid scenario generation across pricing, volume, mix, cost, capacity, and workforce. Sensitivity analysis at scale. Natural-language interaction enabling business users to explore scenarios without technical complexity.

Outcome: Leaders can test options in real time, grounded in consistent data and models. FP&A becomes an interactive steering capability rather than a retrospective reporting function.



Stage 4: prescriptive intelligence and optimisation

Objective: translate insight into recommended actions

Primary value
Better decisions with quantified trade-offs

AI moves from insight to action: it doesn't just explain what's happening, it recommends what to do next with consideration of real constraints.

Key priorities:

- Explicit encoding of constraints (cash, capacity, service levels, regulatory limits, workforce availability)
- Decision workflows that support review, challenge, approval, and execution

- Strong explainability and traceability from recommendation back to data and assumptions

AI role: Optimisation of budgets, headcount, working capital, pricing, and investment portfolios. Prescriptive recommendations with clear trade-offs across margin, cash, growth, service, and risk. Incorporation of external signals such as macroeconomic indicators and geopolitical risk.

Outcome: FP&A moves beyond analysis to active decision support. AI proposes options, while finance and business leaders retain accountability.

Stage 5: continuous planning and enterprise steering

Objective: make fp&a a real-time steering function

Primary value
Resilience, alignment, speed at scale

At full maturity, planning is continuous and execution-linked. AI is pervasive, but governance is stronger because decisions are traceable, explainable, and owned.

Key priorities:

- Continuous planning where forecasts, scenarios, and optimisations update dynamically
- Deep integration with ERP workflows, linking insight directly to execution
- Cross-functional alignment across finance, operations, HR, and procurement

- Institutional learning captured within the platform over time

AI role: Early warning systems that sense risk from internal behaviour and external signals. Proactive scenario generation and response planning before disruption materialises. Continuous improvement of models as assumptions, behaviour, and outcomes are observed.

Outcome: The FP&A platform becomes the decision backbone of the organisation. AI orchestrates insight, options, and timing, while governance, transparency, and accountability remain intact.

This evolution isn't about replacing FP&A technology. It's about stopping people from being trapped in it and evolving the platform deliberately. The differentiator shifts from delivering a static model to sustaining a living system. Winning organisations invest in platforms that learn, evolve, and improve decision quality over time.

Where we're heading

In the near future, leading organisations will run finance and performance management as an always-on system: data arrives continuously; models update forecasts and risk ranges; scenarios generate in minutes; and decision forums focus on options, trade-offs, and actions rather than debating the integrity of spreadsheets.

Three forward-looking pillars define this direction:

Cross-platform intelligence

AI that spans ERP, FP&A, HCM, and procurement. Connecting operational reality to financial planning. Recommendations grounded in full organisational context.

Continuous, event-driven planning

From periodic cycles to always-on forecasting and scenario intelligence. Sense changes as they happen. Respond while choices still exist.

Decision-ready insights

From data to recommended action. Quantified trade-offs, transparent assumptions, and governed workflows. Human oversight at every step.

To earn and keep a place at the leadership table in this future, FP&A must be known for three things:



Trust

Governed numbers, transparent assumptions, and audit-ready traceability.



Speed

Shorter signal-to-decision times, enabled by automation and exception-based work.



Relevance

Decision-centric insights that leaders can act on immediately, tied to strategy and operational levers.

Conclusion

An evolution, not a replacement

AI will remove low-value friction, accelerate insight, and raise expectations for decision support. The organisations that succeed will treat AI as a modernisation of the performance system, with trusted data and human accountability at its core.

Trust. Speed. Relevance. AI amplifies all three. But only when it's built into the right platform.

About Unit4 FP&A

Unit4 FP&A is purpose-built for people-centric, service-led organisations. It connects directly with Unit4 ERPx and HCM, enabling AI to work with live operational data rather than static exports. Unit4 was rated Excellent (4.33/5) by BPM Partners across Workforce Planning, Finance Self-Sufficiency, and Revenue Performance Management. 83% of customers would recommend Unit4 FP&A.

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For more information go to:

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