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BUSINESS GUIDE

Financial Storytelling in the Age of AI

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If you're a finance professional and you spend weeks on a brilliant analysis, present it to leadership, and then people just nod politely and move on to the next topic. That's a failure.

Your job isn't just to present numbers. It's to get leaders to discuss your insights, agree on actions, and actually implement your recommendations.

This means you must master financial storytelling.

I'm going to walk you through the exact framework I use to turn financial presentations into compelling stories that drive actual business decisions.

It's the same framework I used when I was leading finance teams at Unilever and Squarespace—and it's what I teach at companies like Google, Merck, and Lowe's as a corporate trainer. And at the end, I'll share the specific AI prompt I use to automate this process.

Firstly, it's essential to understand that most financial presentations fall flat for a few key reasons. They focus too much on the data itself. They don't have a clear narrative. They fail to connect the numbers to actual business impact. And honestly, they just don't grab and keep people's attention.

Now, I have discovered a framework that completely changed how I approach this. It's from the New York Times bestseller "Made to Stick" by Chip and Dan Heath (citation below). The book looks at how advertisers make their messages memorable and impactful. And when I read it, I thought, "wait a second, we can actually apply this to financial presentations."

And it works. It has transformed how I teach FP&A (Financial Planning and Analysis) professionals to communicate.

Christian Wattig, Director, Wharton FP&A Program

Citation
Heath, Chip, and Dan Heath. Made to Stick: Why Some Ideas Survive and Others Die. Random House, 2007.

It's the SUCCES framework. Here's what that stands for:

S is for Simple
U is for Unexpected
C is for Concrete
C is for Credible
E is for Emotional
And S is for Stories

Let me break down each element and show you exactly how to apply it to your financial presentations.

S: Keep It Simple

So first up—keep it simple. Your slides should be clean and to the point. Before you even start building your deck, ask yourself: what's the one thing I want people to take away from this?

Here are three rules to ensure simplicity:

1. **One Slide, One Message.** Each slide should have just one main message. Sometimes, with financials, that's not possible, but try to keep it to no more than three insights per slide. If you have more to say, start a new slide.

2. **Don't Waste Your Headlines.** Your headline is the most valuable real estate on the slide. Don't waste it by just saying "May Sales Actuals." Use it to tell the story.

   - Bad: "May Sales Actuals"

   - Good: "May Sales Exceeded Target by 12% Due to Product Launch Success"

3. **The Two-Step Final Check.** Before you finalize your slides, run them through these two quick checks:

   - **The Skim Test:** Skim the deck and check if the key message of each slide is immediately clear. Even better, ask someone who hasn't seen it to skim through and tell you what they got from it. If they can't catch the key message right away, your slides aren't simple enough.

   - **The Visual Audit:** Look specifically at the visuals. Make sure they support your message rather than distract from it. If you've got too many data labels, too many lines, or you're just trying to show too much in one chart, there's a good chance it's hurting more than helping.

U: Be Unexpected

Next, be unexpected. You want to grab your audience's attention by surprising them. Lead with your most impactful insight. Put it right there in the headline so people see it immediately. This creates curiosity and makes them actually want to hear more.

One of the biggest mistakes I see is people reading what's on the slide. The thing is, people can skim your slide faster than you can read it to them. By the time you're halfway through reading it, they've already seen everything. So the second half just becomes repetition. And nothing bores people more than repetition.

So how do you avoid this? You need what I call voiceovers. That means having talking points that go beyond what's on the slide.

Here are four specific strategies to create an effective voiceover:

1. **Context, Action, Result.** You show the result on your slide, but when you're speaking, you mention the context and what actions were taken. This adds narrative depth without cluttering your visual.

2. **Drill Down and Drill Up.** This allows you to address details without showing every single data point.

   - **Drill Down:** Let's say you're reporting results by country. You might say: *"In the United States, we missed our sales forecast by three percentage points. But at the state level, all states are meeting expectations except California. And because California has such a big weight, it's dragging down our overall performance."* (You aren't showing state-level data on the slide—you're just speaking to it).

- **Drill Up:** This is the opposite approach. *"We missed the sales forecast in the United States by three percentage points. But as I mentioned in the executive summary, on a global level, we're still well on track to meet our targets."*

3. **Long-Term Comparisons.** You probably already have a prior year comparison on your slide. But when you're talking, add context by mentioning how the figures compare to two or three years ago, or how they compare to a past baseline (like pre-pandemic numbers).

4. **The "Reservation" Technique.** This one surprises people, but I strongly recommend talking about your reservations and what you're still working on. Some people worry that mentioning reservations will undermine their recommendations, but it actually does the opposite. By showing data that doesn't

perfectly align with your story, you demonstrate that you looked at the business from all angles and aren't cherry-picking results. Leaders respect that.

C: Make It Concrete

People only remember what they actually understand. Abstract concepts don't stick. But concrete examples and specific details do.

So whenever you share something abstract, add a concrete example. Even better if you can include analogies or metaphors when you're explaining complex financial processes. This makes the content accessible to everyone in the room, not just the finance people.

And when you're dealing with complex calculations or financial models, break them down into smaller, understandable parts. Walk your audience through each part. Pause for questions before moving to the next section. Don't rush through it. Clarity is more important than speed.

C: Establish Credibility

Credibility is crucial when you're presenting financials. If the audience doubts the messenger, they will doubt the message.

Here are four rules to maintain that trust:

1. **Never Guess.** This is rule number one. If you get an unexpected question, it's totally fine to say, "I'll get back to you later." That beats saying something you'll regret because it wasn't accurate.

2. **Have Sources Ready (But Don't Overshare).** Be ready to share your data sources, but only when you're asked. Have your sources documented and ready to go, but don't share too much detail about your methodology proactively. Sometimes oversharing actually raises questions that people wouldn't have even thought about otherwise.

3. **Respect the Visuals.** Credibility isn't just about the numbers you speak; it's also about how they look on the screen. This might seem superficial, but if your slides look messy, points aren't aligned, or you're using random fonts, people will—consciously or subconsciously—assume you were sloppy with your analysis, too. Fair or not, that's how it works.

4. **The Peer Review.** Nothing is worse than having to correct yourself after presenting inaccurate data. Always triple-check your numbers. Ideally, ask a colleague for a quick review before the meeting. Ask them if anything looks odd or stands out. Even if they're not as familiar with the topic as you are, a different perspective helps catch errors you might have become blind to.

E: Create Emotional Connection

I know this surprises people because finance is supposed to be all about the numbers. But here's the reality: making an emotional connection makes your message more compelling and memorable.

Here are three ways to build that connection without losing your professional edge:

1. **The Rule of Comparators.** Context is the first step toward emotion. Without context, you literally can't say whether a number is good or bad. I tell my team: if there's a metric on a slide without a comparator, take it off. It's not helpful for decision-making. Every metric must be compared to the prior year, the forecast, or the budget to have meaning.

2. **Bring in the "Voice of the Customer".** Newspapers figured this out a long time ago. When they report on major trends, like the economy or elections, they always zoom in on individual stories to interview the people affected. Why? Because hard facts alone aren't enough to convey emotion. Personal stories make the message stick. You can do the same in corporate presentations. Technically, it doesn't add "data," but it adds impact.

   - Play audio from the consumer hotline.

   - Quote specific feedback from a customer interview.

   - Share a user story that highlights the success of a new product launch.

3. **The "No Surprises" Rule.** Emotional connection works both ways—you want to avoid negative emotions like defensiveness. Be very careful when presenting bad results, like a big miss versus the target. Make sure the people responsible are informed before the meeting. Never surprise someone with bad news about their area in a group setting. This prevents unnecessary embarrassment and maintains trust.

S: Tell Stories

This is where everything comes together.

Financial presentations should tell the story behind the numbers. The "so what." What they mean for the company today. And most importantly, what actions should be taken. It's all about interpretation and implications.

Every effective story, whether it's a movie or a monthly business review, needs three components: a beginning, a middle, and an end.

Here is how to apply that structure to finance:

1. **The Beginning (The Context).** This sets the scene. It describes the situation and identifies the obstacle that needs to be overcome.

2. **The Middle (The Impact).** This is where you show the conflict or the result. What is the financial consequence of that obstacle?

3. **The End (The Resolution).** This is the most critical part. It introduces the "hero" (the solution) and the bold action required to fix it.

A Practical Example
Let me show you exactly what this looks like in a finance context:

*   **The Beginning:** "Last month's orders were 30% lowerthan the prior year. Unfortunately, our production plan was based on prior year levels."

*   **The Middle:** "As a result, we missed our inventory forecast by 40%, and working capital increased by 10 million dollars."

*   **The End:** "We identified the root cause—three specific customers changed their order timing. We contacted them directly, and they confirmed that the gaps will be closed this month. Based on this, we recommend no change to our forecast."

See how that structure gives leaders everything they need? They understand what happened, they see the business impact, they know the root cause, and they have a clear recommendation.

That's how you turn numbers into a story that drives decisions.

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Now, how can you use AI to help you with implementing this?

First, you need to train it on the SUCCES framework. That's easier than it sounds. All it takes is copying the above paragraphs into the chatbot.

Greg Brockman's Prompting Framework

| Goal | Output Format | Warnings | Context |

Then, you upload the draft of your slides—of course, check first if you are allowed to upload confidential information.

Lastly, you prompt AI to help you apply the framework to your slides. For best results, I like to use Greg Brockman's prompting framework.

Here is what the finished prompt looks like:

"*Goal:*
I'd like you to help me improve the attached financial presentation. Specifically, review if the slides implement the SUCCES framework. I'll detail it below.

Output Format:
Tell me where I'm already following the SUCCES principle and where there is room for improvement.

Warnings:
When there is room for improvement, make sure to give me concrete examples of how I can improve the slides.

Don't just focus on what's on the slide, but also tell me how the SUCCES framework can help me add voiceovers to add depth and better engage my audience.

Context:
I'm an FP&A manager at a mid-size fintech company. I will present the slides to the entire senior leadership team, so the stakes are high for me.

Here are the details about the SUCCES Framework:

(paste the text from this article)"

Note that if your deck has a lot of pages, ChatGPT, Gemini, Copilot, and the like may struggle with processing all of it with a single prompt. When you notice that it doesn't give you advice for all of the slides, use the "Chunking" technique. Start a new chat and copy/paste the same prompt from above, but upload only 5-10 slides at a time. Then, you upload the next set of slides and simply prompt AI, "Continue with the attached slides in the same way."

Ultimately, financial storytelling is what bridges the gap between raw data and business impact. By combining the psychological principles of the SUCCES framework with the efficiency of AI, you're not just saving time— you're elevating your role. You're moving from someone who simply reports the news to someone who helps "make" the news.

Don't let your brilliant analysis get lost in a polite nod. Use these tools to ensure your message sticks, your insights are understood, and your recommendations drive action.

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