

AI FOR FINANCE & DEAL TEAMS

A Practical Prompting Guide

Get better, faster answers from AI tools on the finance and transaction work you do every day — without the guesswork.

Why prompting matters

AI tools are only as good as what you ask them. A vague request ("help with my financials") gets a vague answer. A precise, well-structured prompt gets output you can actually use. The good news: strong prompting follows a simple, repeatable pattern.

The anatomy of a strong prompt

Give the AI five things — **Role**, **Task**, **Context**, **Format**, and **Guardrails**:

- **Role** — tell it who to be: *"Act as a fractional CFO."*
- **Task** — the specific job: *"Write variance commentary."*
- **Context** — the data and background it needs to work from.
- **Format** — how you want the answer: *"a short table," "under 150 words."*
- **Guardrails** — constraints: *"plain language for a non-finance exec; don't invent numbers."*

A REUSABLE TEMPLATE

Act as [role]. **I need you to** [task].

Here's the context: [paste data / background].

Format the output as [format]. **Constraints:** [what to keep or avoid].

Ready-to-use prompts

Quality of Earnings — spot the issues

You are a financial due-diligence analyst. Below is a target's monthly P&L for the last 24 months [paste]. Identify potential earnings-quality issues — unusual revenue spikes, margin swings, likely one-time items, and expenses that may need normalizing. For each, note why it matters and what supporting detail you'd request. Present as a short table.

Variance / flux commentary

Act as a controller. Here is this month's actual vs. budget by line item [paste]. Write concise flux commentary explaining the top five variances in plain business language for a non-finance executive. One or two sentences each. Don't invent figures.

13-week cash flow — board summary

You are a fractional CFO. Given this 13-week cash forecast [paste], summarize the cash position for the board: the low point, the key drivers of any tight weeks, and two or three actions to protect liquidity. Keep it under 150 words.

Buy-side diligence request list

You are leading buy-side financial due diligence on a [industry] company doing about \$[X] in revenue. Draft an initial information request list covering financials, quality of earnings, working capital, taxes, and systems. Group it by category.

Monthly investor update

Draft a monthly investor update for a [industry] company. Inputs — revenue \$[], EBITDA \$[], cash \$[], wins [], challenges [], asks []. Tone: confident but candid. Structure: TL;DR, key metrics, highlights, lowlights, asks.

ERP requirements gathering

Act as an ERP selection advisor. Help me build a requirements list for a [industry, size] company replacing [current system]. Ask me five clarifying questions first, then produce a categorized requirements checklist across finance, operations, reporting, and integrations.

TIPS THAT LIFT QUALITY

- Give an example of the output you want.
- Ask it to think step by step for analysis.
- Iterate — refine the prompt, don't accept the first draft.
- Ask it to list its assumptions.

COMMON MISTAKES

- Too vague — no role, task, or format.
- No context — it can't read your files or mind.
- Trusting numbers blindly — always verify.
- One-and-done — the magic is in the follow-ups.

Before you paste: never put confidential, client-sensitive, or personally identifiable information into public AI tools. Anonymize figures, strip names, or use a private / enterprise AI environment for real deal data. When in doubt, leave it out.