

Finance for Leaders: Read the Numbers, Make the Case

February 17, 2026 | Career + Leadership

Translate financial documents, build a business case, and rehearse the questions a decision-maker may ask.

February 17, 2026

With Cheryl Thompson

Who it is for

Leaders who need to interpret numbers and make a business case

Inside this playbook

9 copyable prompts and practice blocks.

[Open the online playbook](#)

The recorded session

Watch the Learning Lab.

Follow the session, then use the playbook with your own work.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Translate financial information into plain language.
2. Connect a proposal to the business decision it supports.
3. Rehearse the questions a decision-maker may ask.

Use the learning

Your playbook

Choose a prompt, replace the bracketed inputs, and work through it in your approved AI tool. Review the result and adapt it to your situation.

This playbook accompanies the February 17, 2026 session. Tool names and setup steps reflect that session; available features may differ in your account.

Welcome to Your AI Toolkit

You don't need a finance degree to have a seat at the table. You need a translator.

This playbook gives you three AI prompts that turn financial documents into plain-language briefings, messy ideas into structured business cases, and untested pitches into meeting-ready presentations. These are the same prompts demonstrated in the session — saved here so you can use them whenever you need them.

- You don't need to use everything at once. Start with the one prompt that solves your most immediate problem.
- These prompts work across platforms: Copilot, ChatGPT, Gemini, Claude, or your company's internal AI tool.
- Each prompt includes a main version (for licensed tools with full context windows) and an alternate version (for free Copilot or tools with limited input).

How to Use This Playbook

- **Start with one prompt.** If you have a financial document you need to understand, start with Prompt 1. If you have an idea you need to pitch, start with Prompt 2. If you have a meeting coming up, jump to Prompt 3.
- **Give AI context before asking for help.** The more specific your inputs (your actual financial document, your real initiative description), the more useful the output.
- **Review and refine.** AI output is a first draft, not a final answer. Iteration is expected — and it's where the real value shows up.
- **Check your company's AI policy.** Before pasting company financial data into any AI tool, confirm what your organization allows. You can always practice with the sample document included here first.

The AI Efficiency Ladder

Know where you are. Know where you're going.

Level	What It Looks Like	Time / Task
1. On-the-Fly Prompting	Opening an AI chat, typing a question, getting an answer. Starting from scratch every time.	5–10 minutes, inconsistent
2. Repeatable Prompts	Saved templates you fill in. Same quality every time because same structure.	2–3 minutes, consistent

Level	What It Looks Like	Time / Task
3. Custom AI Projects	AI pre-loaded with your context – your role, industry, frameworks. Works like a team member.	1-2 minutes, personalized
4. Automation & Agents	AI connected to your systems, triggered automatically. Runs without you.	0 minutes, scales

Your goal: Move from Level 1 to Level 2. The prompts in this playbook get you there.

The Prompt Structure

Every strategic prompt has four parts:

Part	Purpose	Example
ROLE	Who should AI pretend to be?	"You are a seasoned nonprofit strategist..."
CONTEXT	What does AI need to know about you?	"I lead a mid-sized nonprofit focused on workforce development..."
REQUEST	What specifically do you want?	"Help me draft a compelling board update..."
QUESTION	Invite the AI to get as much information from you as possible.	"Please ask me any clarifying questions."

Key Prompts from This Lab

This lab taught three prompts that work as a sequence — Interrogate, Translate, Stress Test — plus two visual dashboard prompts using Gemini Canvas.

Prompt 1 — The Financial Document Decoder

What it's for: Understanding any financial document (P&L, balance sheet, budget report, quarterly review) in plain language — with concerns, strengths, risks, opportunities, questions to ask, and questions to be prepared to answer. **When to use it:** Before any meeting where financial documents will be discussed. When a document lands on your desk and you need to understand it quickly and confidently.

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use when you can paste the full financial document.

Main Version (Licensed Copilot / ChatGPT / Gemini)

PROMPT TO COPY

ROLE: You are a financial advisor who specializes in explaining financial documents to non-finance leaders in the automotive and manufacturing industry.

CONTEXT: I am a non-finance leader preparing for a meeting. I did not study finance. I need to understand this document quickly and confidently.

REQUEST: Review the financial document below and provide:

1. Executive Brief (5–8 bullet points)
 - Summarize what matters most if I am walking into a meeting in 10 minutes.
2. Top 3 Areas of Concern
 - Explain clearly why each matters.
3. Top 3 Strengths
 - Where are we performing well?
4. Emerging Risks
 - Trends or signals that could become problems.
5. Opportunities
 - Where investment, focus, or action may be warranted.
6. 5 Smart Questions to Ask in the Meeting
7. 5 Questions I Should Be Prepared to Answer
 - If someone turns to me and challenges these numbers.

FORMAT:

- Use bold section headers.
- Use bullet points.
- Define any financial term in plain language before using it.
- Be concise but specific.

IMPORTANT:

- Do not invent data.
- If something appears unusual, clearly flag it.
- Assume I am intelligent but not trained in finance.

[PASTE FINANCIAL DOCUMENT]

Alternate Version (Copilot Free / Limited Context)

Use when you cannot paste a full document.

Alternate Version (Copilot Free / Limited Context)

PROMPT TO COPY
I will paste selected line items from a financial report. Based only on the information provided: 1. Explain what each major line item means in plain language. 2. Identify anything potentially concerning or unusual. 3. Identify strengths in the data. 4. Suggest 5 smart questions I should ask in a meeting. 5. Tell me what additional data would help make a stronger analysis. Be concise. Define financial terms in plain language. Do not invent numbers. If data is missing, clearly say so. [PASTE SELECTED LINE ITEMS]

Prompt 2 — The Business Case Translator

What it's for: Turning a messy idea or initiative into a structured business case with financial language that resonates with leadership. **When to use it:** When you want to propose an initiative, request a budget, justify an investment, or pitch an idea in language finance stakeholders will take seriously.

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use when framing an initiative for finance stakeholders.

Main Version (Licensed Copilot / ChatGPT / Gemini)

PROMPT TO COPY
ROLE: You are a finance translator for non-finance leaders in the automotive and manufacturing industry. CONTEXT: I have an initiative I want to propose, but I need to frame it in financial terms that resonate with leadership and finance stakeholders.

PROMPT TO COPY

REQUEST: Transform my description into:

1. One-Paragraph Problem / Opportunity Statement
2. Categorized Financial Impact:
 - Revenue Impact
 - Cost Savings
 - Risk Reduction
 - Efficiency Gains
3. 3–5 Executive Pitch Bullet Points
 - Link clearly to financial impact.
4. Evidence Gaps
 - Identify what data, metrics, or proof would be required to make this proposal credible.
 - Do not invent numbers.

PRIORITY:

- Prioritize financial clarity over persuasion.
- If impact cannot yet be quantified, explain how it could be estimated.

Be structured.

Be specific.

Do not exaggerate.

NEXT STEP:

Ask me for my initiative

Alternate Version (Copilot Free – Two-Step Format)

Step 1:

Alternate Version (Copilot Free – Two-Step Format)

PROMPT TO COPY

Rewrite this initiative as:

1. A clear problem statement.
2. A categorized list of financial impacts (revenue, cost savings, risk reduction, efficiency).
3. 3 concise pitch bullets tied to financial impact.

Do not invent numbers.

NEXT STEP:

Ask me for my initiative

PROMPT TO COPY**Step 2:****Alternate Version (Copilot Free – Two-Step Format)****PROMPT TO COPY**

Now analyze the business case above and:

1. Identify weak or vague claims.
2. List the specific data required to strengthen this proposal.
3. Suggest how impact could be estimated if exact numbers are unavailable.

Be direct.

Be specific.

Prompt 3 — The Objection Role Play

What it's for: Preparing for pushback by having AI role-play as the person you're presenting to — surfacing objections, the concerns driving them, and how to respond. **When to use it:** Before any meeting where you're presenting a case and expecting resistance. Run this after Prompt 2 to prepare for the real conversation.

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use when preparing for pushback before a leadership meeting.

Main Version (Licensed Copilot / ChatGPT / Gemini)**PROMPT TO COPY**

ROLE: You are the executive I will present this business case to. Role-play as a skeptical [VP / CFO / Owner] in the automotive or manufacturing industry who has evaluated many proposals.

CONTEXT: I am about to present the business case below. I want to prepare before the real meeting.

BUSINESS CASE:

[PASTE OUTPUT FROM PROMPT 2]

TASK:

PROMPT TO COPY

1. List the 5 most likely objections I will face.
2. For each objection:
 - Explain the underlying concern driving it.
 - Provide a strong, concise response I could use.
3. What is the most dangerous question I could be asked?
 - Explain why it is dangerous.
 - Provide a strategic way to answer it.

Be realistic.

Avoid generic objections unless tied to something specific.

Do not soften the critique.

Alternate Version (Copilot Free – Shortened)**PROMPT TO COPY**

Act as a skeptical executive reviewing this proposal.

1. List 5 likely objections.
2. Explain the real concern behind each objection.
3. Provide concise responses.
4. Identify the one question that could seriously damage this proposal and how to handle it.

Be direct and specific.

[PASTE BUSINESS CASE]

Bonus — Gemini Canvas Dashboard Prompts

These prompts work in Gemini Canvas (free with a Google account at [https://gemini.google.com/canvas](#)). They turn your AI outputs into visual dashboards and one-pagers you can present or share.

P&L / Financial Data Dashboard

PROMPT TO COPY

Create a leadership-ready dashboard layout using this financial data.

Include:

- KPI summary section at the top
- Trend visualizations
- Clearly marked risk indicators
- Clearly marked strength indicators
- One short executive summary box

Design:

- Clean
- Minimal
- Suitable for executive presentation
- Easy to interpret quickly

[PASTE FINANCIAL DATA]

Business Case One-Pager

PROMPT TO COPY

Create a one-page executive business case summary.

Layout must include:

- Header with initiative title
- Problem statement
- Categorized financial impacts
- Simple 3-phase timeline
- Key risks
- Clear "The Ask" section

Design it clean, structured, and board-ready.

Suitable to attach to an email to senior leadership.

[PASTE BUSINESS CASE]

Quality Check — Before Sharing AI Output

- [] **Did AI invent numbers?** Every figure in the output should come from your input or be clearly marked as an estimate.

- [] **Did it clearly flag missing data?** A good output tells you what's absent, not just what's present.
- [] **Does this reflect what I know about my business?** If something doesn't match your experience, trust your experience and investigate the gap.
- [] **Are objections realistic for MY leadership team?** Generic pushback isn't useful. The best objection prep mirrors the specific people you're presenting to.
- [] **Have I verified compliance with my company's AI data policy?** Especially before pasting financial documents into any external AI tool.

Copilot Basics (If You Use Microsoft 365)

- **Work Mode vs. Web Mode:** Work mode searches your company's Microsoft 365 data (emails, files, Teams). Web mode uses the open internet. For financial documents stored in your company systems, Work mode may pull relevant context automatically. For the prompts in this playbook, Web mode is typically more appropriate since you're pasting specific content.
- **When to use each:** Use Work mode when you want AI to reference your company's internal data. Use Web mode when you're pasting content directly and want general analysis (like these prompts).
- **How to save prompts:** Copy any prompt from this playbook into a Word document, OneNote, or Notion page you can access quickly. Label each one so you can find it fast when you need it.
- **Reminder:** Always follow your company's AI usage policy. If you're unsure whether you can paste a specific document into AI, ask your IT team or manager first.

What to Try This Week

- [] **Try Prompt 1 this week.** Find a financial document you've been avoiding or a report you need to review for an upcoming meeting. Paste it in. Read the briefing. Notice how much more confident you feel.
- [] **Build one business case.** Think of an initiative you've been wanting to propose — even a small one. Run it through Prompt 2. See what comes back.
- [] **Start a prompt file.** Save these three prompts somewhere you can find them in 30 seconds. A Word doc, a Notion page, a pinned note — whatever works for you. The prompts only help if you can access them when you need them.

Resources & Next Steps

- [Link to AI Learning Lab Library](#) ^[2]

- **Learning Lab Library:** All past and upcoming Learning Lab sessions, recordings, and playbooks are available in the Learning Library. Bookmark it for easy access.
- **AI is a skill that compounds.** The first time you use these prompts, it might feel unfamiliar. The fifth time, it will feel like second nature. The difference between people who adopt AI and people who don't isn't talent — it's repetition.
- **What we didn't cover today:** Customizing these prompts with your company's specific financial structure, building custom AI agents for your leadership team, and creating systems where every business case your team produces is already calibrated to your organization's decision-making process. If you're curious about what that looks like for your team, those conversations are always open.

The Mental Model — Ask the Document, Don't Study the Subject

Today's session was built on one idea: you don't need to become a finance expert. You need to learn how to interrogate a financial document and translate your ideas into the language finance speaks.

Step	Prompt	What It Does
Interrogate	Prompt 1 — Financial Document Decoder	Turns an intimidating financial document into a plain-language briefing with concerns, strengths, risks, opportunities, and the right questions.
Translate	Prompt 2 — Business Case Translator	Turns a messy idea into a structured business case with financial language that resonates with decision-makers.
Stress Test	Prompt 3 — Objection Role Play	Simulates the meeting before it happens — surfacing objections, the concerns behind them, and how to respond.
Visualize	Gemini Canvas Dashboards	Turns data and business cases into visual dashboards and one-pagers you can present or share.

The numbers were never the hard part. Not having anyone to explain them was. Now you do.

Related resources

Keep working with the material.

The prompts and exercises are included above. Save a useful prompt and return to it with your next task.

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1165780438/c5d43caa71>

[2] <https://www.cherylthompson.net/learning-labs#browse>