

**AFP FP&A FORUM**

# **BOOSTING YOUR FINANCIAL STORYTELLING WITH AI**

**A Masterclass by  
Soufyan Hamid**



**YOUR  
EXPERIENCE  
WITH AI IN  
FINANCE**



**CHATGPT**



**GEMINI**



**COPILOT**

A blurred background image showing several hands raised in a meeting or presentation setting. The hands are positioned at various heights, suggesting an active discussion or a Q&A session. The overall tone is professional and collaborative.

**WHO USES THAT FOR  
THEIR FINANCE  
PRESENTATION?**

A blurred background of an office environment with several people in business attire. The focus is on the large white text in the foreground.

# 41%

**FP&A PROFESSIONALS REPORTING USING AI**  
**(FP&A TRENDS GROUP, 2025)**



**15%**

**USING AI FOR THEIR PRESENTATIONS**  
**(SURVEY ON LINKEDIN, 2026)**

# 5 main issues with Finance Presentations



The presentation doesn't contain a clear message



Slides are not visually appealing and contain too much information



The content is not tailored to the audience



The delivery is not prepared enough and lacks confidence



There is no use of a narrative

Feedback from my interviews with 50+ CFOs,  
Finance Directors and FP&A managers  
Update March 2025

**HOW CAN  
WE MAKE  
IT BETTER  
WITH AI**



# SOUFYAN HAMID



[Thefinancecircle.com](https://thefinancecircle.com)

## 17 years experience in Finance



## Founded The Finance Circle



Finance Business  
**Partnering**



Financial  
**Storytelling**



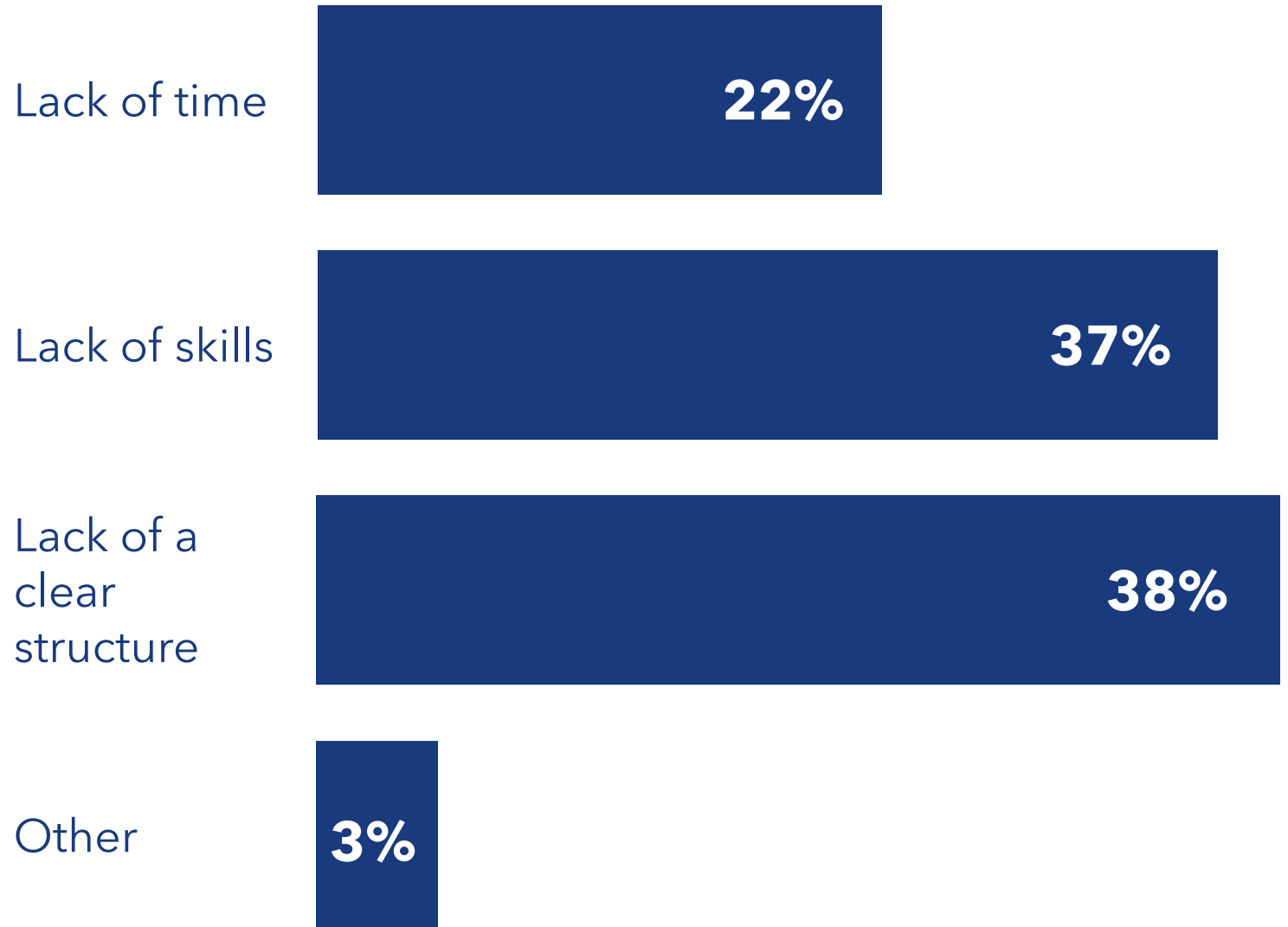
Finance for  
**Non-Finance**

## Happy clients



**WHY ARE  
PRESENTATIONS  
CHALLENGING  
FOR US?**

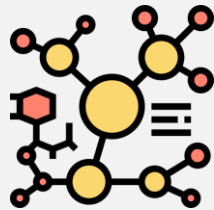
# WHY ARE PRESENTATIONS CHALLENGING FOR US?



# How can AI help us?

## Lack of a clear structure

Prepare your **outline** and your deck structure with **GenAI Tools**, incl. backup slides



## Lack of time

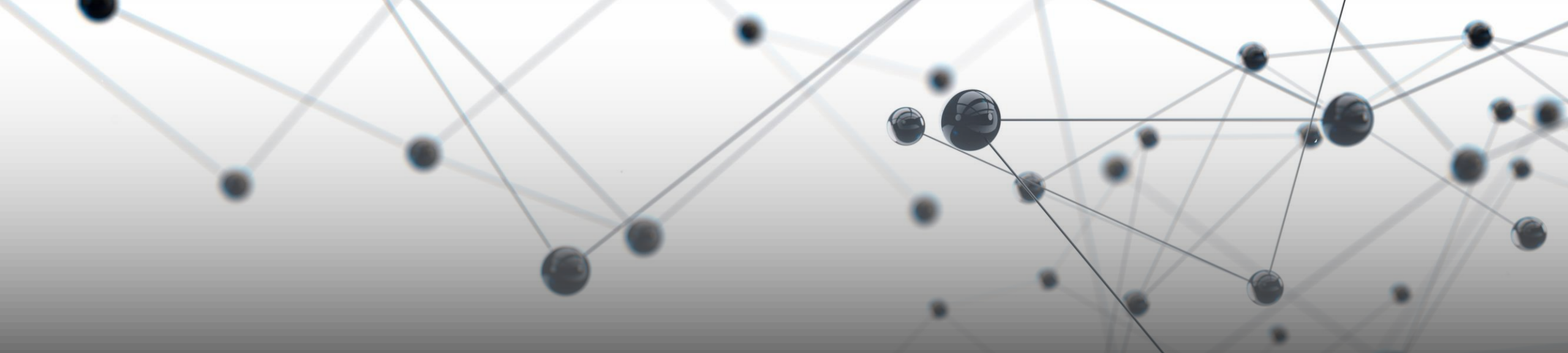
Get the **Summary** or the **Executive Summary** of your team's presentation



## Lack of skills

**Rehearse** your presentation or have it delivered **by an avatar**





# LACK OF STRUCTURE



**PREPARE THE  
OUTLINE OF YOUR  
PRESENTATION  
WITH COPILOT**



Work

Web

GPT-5 On



## Welcome Soufyan, how can I help?

You are using Copilot with GPT-5. [Learn more.](#)

I'm the CFO of a consulting company in Belgium having to present the YTD results to the partners of the company. The goal is to make a presentation about the actuals vs budget but to be most future-oriented and focus on our outlook and the main risks and opportunities for the 2 coming months and what it means



List key points from Content  
Calendar Simplified.xlsx

You edited



Show me all the unread emails  
from person, along with their...



What is the schedule outlined in  
the email titled email?

[See more](#)



**PREPARE YOUR  
SLIDE DECK  
WITH COPILOT**

## Handout: Executive Summary (one-pager text)

**Headline:** *Outperforming plan; two months to bank the upside and set a stronger 2026*

**KPIs:** Rev €2.16M (+8.5%), Profit €1.35M (+4.7%), Cost €811K (15.4% over plan).

**Drivers:** NL & BE strength; top projects **BE-002/BE-025**; cost pressure in FR (payroll & subs).

**Next steps (Nov-Dec):** prioritize high-ROI projects, -10% non-billables (~€60K uplift), enforce €80/hr baseline in FR.

**Risks:** FR overrun, non-billable slippage, revenue timing into Jan.

**Opportunities:** Mix shift to BE/NL, subcontracting rate actions, utilization discipline.

**2026 Implication:** Higher entry run-rate and margin floor if levers are embedded in the plan.

CFO summary of insig...

Would you like me to turn this into a PowerPoint draft with the visuals pre-built and speaker notes included? I can generate a first version now using the figures from [CFO summary of insights](#). CFO summary of insig...



CFO summary of insights



[https://thefinancircle-my.sharepoint.com/personal/soufyan\\_thefinancircle\\_onmicros...](https://thefinancircle-my.sharepoint.com/personal/soufyan_thefinancircle_onmicros...)  
Soufyan Hamid modified 1 hour ago

Sources >



Summarize key risks and mitigation actions for partners

Message Copilot





**PREPARE THE  
CONTENT OF  
YOUR BACKUP  
SLIDES**

CFD Partner Presentation: YTD Performan...

- Executive Summary
- Headline, KPIs, and Strategic Takeaways
- Performance Overview
- Recent Performance Review
- YTD Actuals vs Budget



# CFD Partner Presentation: YTD Performance and Strategic Outlook

Analyzing financial results and future growth plans

AI-generated content may be incorrect.

An hourglass is positioned on the right side of the image, with sand falling from the top bulb into the bottom bulb. The background is a gradient from black at the top to white at the bottom.

**LACK OF TIME**

# PRE-MEETING READING

1. Please review the agenda for the meeting.

**SKIP THE PRE-READ DECK AND  
SEND A CANVAS REPORT INSTEAD**

- New chat
- Search chats
- Library
- Codex
- GPTs
- Explore
- FSP Use Case Maker
- Post From Inspiration
- Long-Form Youtube Script ...
- FP&A Stories Newsletter
- Inspiring Voice Creator
- Projects
- New project
- Content creation hub
- Outreach sequences
- Free Course Storytelling
- Webinars
- Health and sport
- See more
- Chats
- Soufyan Hamid Plus

ChatGPT 5 Thinking

Good to see you, Soufyan.

Write or code

+ Thinking Canvas

www.veed.io is sharing your screen. Stop sharing Hide



**SUMMARISE YOUR  
TEAM'S  
PRESENTATION AND  
GET DIRECT  
ANSWERS TO YOUR  
QUESTIONS**

Summary

Executive Summary

Headline, KPIs, and Strategic Takeaways

Performance Overview

Recent Performance Overview

YTD Actuals vs Budget



# CFO Partner Presentation: YTD Performance and Strategic Outlook

Analyzing financial results and future growth plans

AI-generated content may be incorrect.



# LACK OF SKILLS

A woman with a long braid is seen from the side, gesturing with her hand. She is wearing a dark blazer over a light-colored collared shirt. She is facing another woman who is smiling and holding a folder. The second woman is also wearing a dark blazer and a light-colored collared shirt. They are standing in front of a large whiteboard in a meeting room.

**REHEARSE YOUR  
PRESENTATION WITH AN  
AI-COACH**

CFO Partner Presentation: YTD

- 1 CFO Partner Presentation: YTD Performance and Strategic Outlook
- 2 Executive Summary
- 3 Headline KPIs and Strategic Takeaways
- 4 Current Performance Overview
- 5 YTD Actuals vs Budget



# CFO Partner Presentation: YTD Performance and Strategic Outlook

Analyzing financial results and future growth plans



**PRACTICE EVEN FURTHER  
WITH YOUR OWN APP**

- ☰
- 🔍 Gemini
- New chat
- My stuff
- Gems >
- Questions from CFOs and ...
- Marketing Strategist for So...
- Educational Authority Yout...
- FP&A Stories Newsletter
- Infographic Maker
- AI Earnings CFO Coach
- Chats
- Webinar Strategy For B2B Finan...
- Assistant for email to leads
- LinkedIn Outreach for Finance L...
- B2B Outreach for L&D Partners
- Microsoft's AI Development Platforms
- Ralph Lauren Finance Workshop Strat...
- Activity
- Settings & help
- Belgium
- From your IP address • Update location

Upgrade PRO WORK

Hi Soufyan  
Where should we start?

Enter a prompt for Gemini

+ Tools Fast

- Create image
- Create music
- Help me learn
- Boost my day
- Write anything

Sharper images, better text. Meet Nano Banana 2. Try it



A photograph of three business professionals in a meeting. A woman with blonde hair in a bun is leaning over a man in a dark suit, who is also leaning over another man in a dark suit. They are all looking down at a document on a table. The man on the right has his hand to his chin in a thoughtful pose. The background is a bright, slightly blurred office setting with a window and curtains.

**REHEARSE QUESTIONS FROM  
AN ANALYST WITH AN  
INTERACTIVE AVATAR**

### Script (paste this into HeyGen)

Hi everyone. I want to share where we stand this year and what comes next. Here's what happened. As a group, we're ahead of plan. Belgium and the Netherlands had strong client wins and solid delivery, especially after those busy spring sprints and the big go-lives many of you supported. Luxembourg stayed steady. In France, we faced cost pressure as we staffed hard projects and brought in extra help. Across the group, we also invested time in proposals, training, and internal projects that didn't always show up on invoices, but they do build our future.

So what does this mean for us? First, your hard work is paying off. We're proving that when we focus on the right projects and collaborate across borders, we win. Second, our margin is still fragile if costs run hot or if too many hours are non-billable. That doesn't fall on one team or one country; it's a shared challenge, and we'll tackle it together with support where it's needed most.

Now, what's next. For the next two months, we'll focus our time on the highest-value client work and reduce non-billable activity where we can. We'll match the right people to the right projects, tighten approvals on extra spend, and keep a simple weekly rhythm so everyone sees progress. If you're on delivery, keep flagging risks early. If you're in sales or support, steer demand and help remove blockers fast. Small, consistent actions from each of us will lock in a strong finish and set a higher starting point for 2026.

Thank you for the energy, the care for our clients, and the way you look out for each other. I'm proud of what we've achieved together. Let's finish the year strong—smart choices, focused effort, one team.



Message Copilot



AI-generated content may be incorrect

A man in a dark blue suit and light blue shirt is speaking in a studio setting. He is gesturing with his hands. In the background, there is a large screen displaying a blue and white image, a professional microphone on a stand, and several pendant lights hanging from the ceiling. The overall atmosphere is professional and modern.

**PREPARE AN AVATAR VIDEO  
TO EXPLAIN THE EARNINGS  
TO ALL EMPLOYEES**

Copilot

Analysis

Your **CFO Partner Presentation draft** is ready!

It follows the Minto Pyramid and 3 What framework, with all figures and insights from your document. Each slide includes speaker notes for clarity and impact.

### Download your PowerPoint file:

[CFO\\_Partner\\_Presentation.pptx](#)

### What's inside:

- Executive summary with headline, KPIs, takeaways, next steps, risks & opportunities
- Slides for YTD actuals vs budget, country performance, performance drivers, 60-day outlook, risks, opportunities, action plan, 2026 implications, and close/partner asks
- Visuals and speaker notes for each slide, ready for a 30-minute partner-level presentation

Would you like help customizing the visuals, adding your company branding, or preparing a handout version?

Sources >

Add company branding to the presentation

Create a concise handout version of the executive summary

After having presented to the partners, I will want to communicate about the results to all employees. The audience

- is not finance experts, so the script must be accessible, engaging, and human.



**NOW YOU KNOW HOW  
TO USE AI**

**BUT YOUR TEAM IS  
HUMAN AND NEEDS TO  
INFLUENCE**

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KNOW HOW TO  
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Come to our next Masterclass  
**Financial Storytelling  
Maturity Model**