

AFP FP&A FORUM

Visual Storytelling

Transform Your Slides,
Transform Your Impact

**A Masterclass by
Soufyan Hamid**

YOUR THOUGHTS ON STORYTELLING



83%

**CORPORATE FINANCE PROFESSIONALS
REGULARLY DELIVERING A PRESENTATION**

A person wearing a light-colored hoodie is leaning over a desk, looking down at a laptop. The scene is dimly lit, with a warm, reddish-orange glow. The person's face is partially obscured by the large text overlay.

84%

CFOS/FINANCE DIRECTORS NOT SATISFIED BY THEM

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

SOUFYAN HAMID



Thefinancecircle.com

17 years experience in Finance



Founded The Finance Circle



Finance Business
Partnering



Financial
Storytelling



Finance for
Non-Finance

Happy clients



From boring to
engaging slides



...a good presentation may have no slide at all

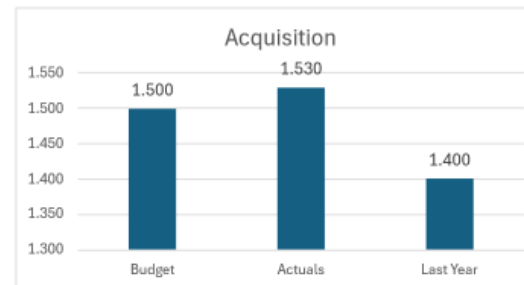
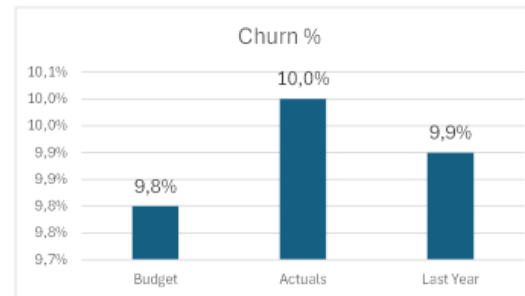
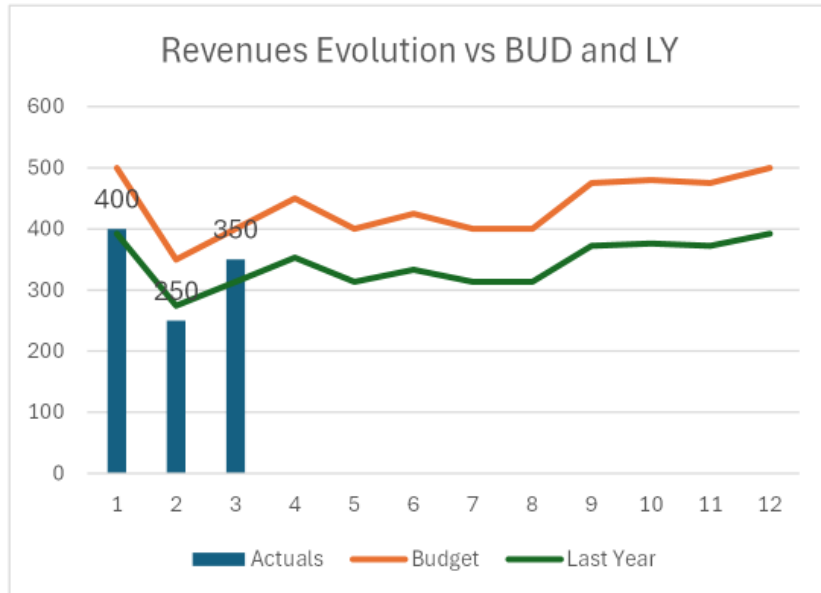
**BUT IF YOU USE SLIDES,
HERE'S WHAT TO AVOID**

...for most audiences

YOUR TURN - What's wrong with this slide?

Reporting 03/2025

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%



P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

- Gross Gains increased vs LY (+130) and are better than budget (+30)



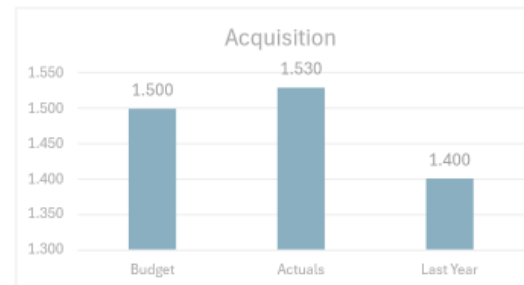
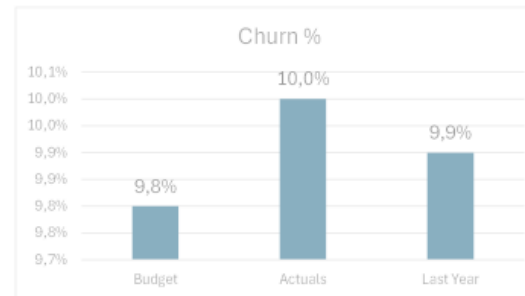
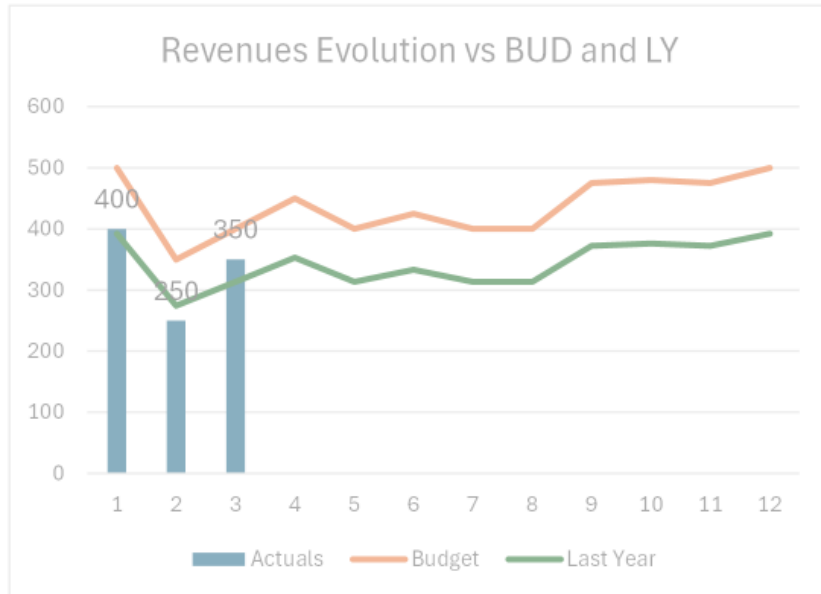
What's wrong with this slide?

What's wrong with this slide?

Reporting 03/2025

Title doesn't say much

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%



P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

- Gross Gains increased vs LY (+130) and are better than budget (+30)

What's wrong with this slide?

Reporting 03/2025

Full tables with no visual cues

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%

P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

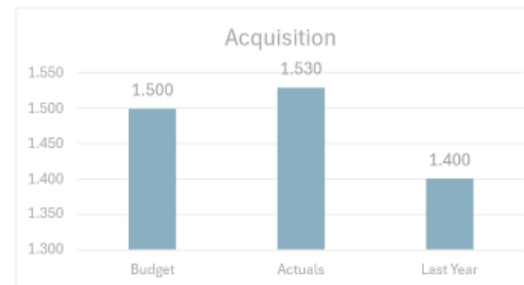
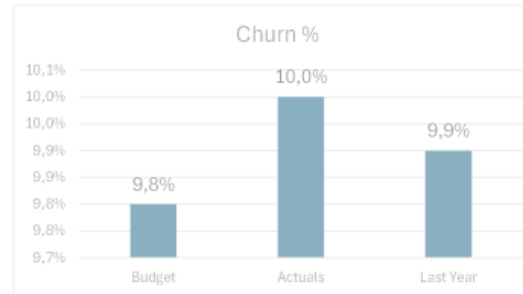
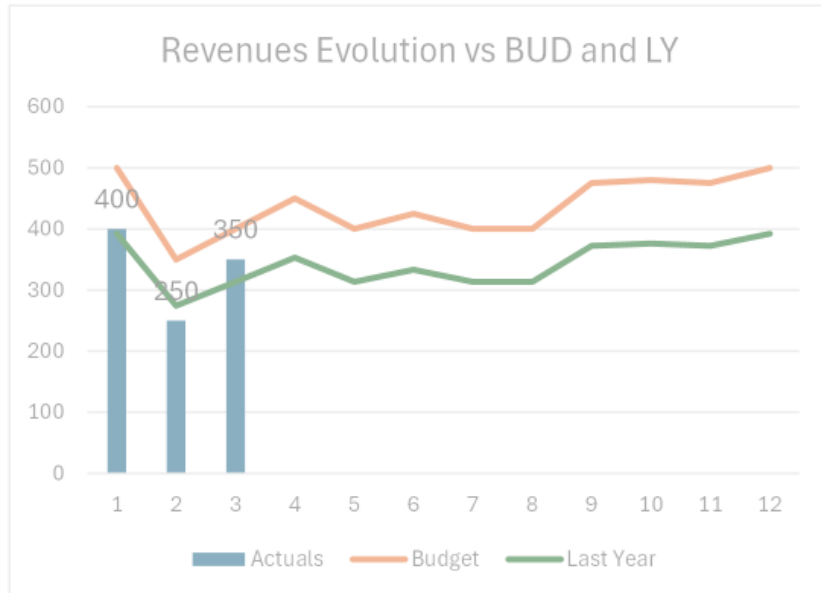
Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

- Gross Gains increased vs LY (+130) and are better than budget (+30)

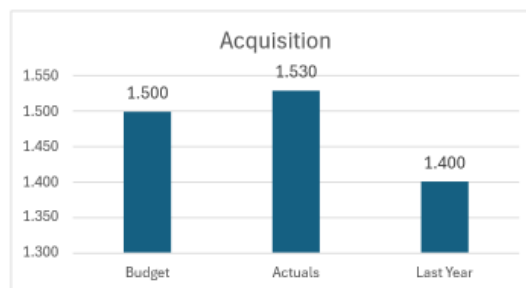
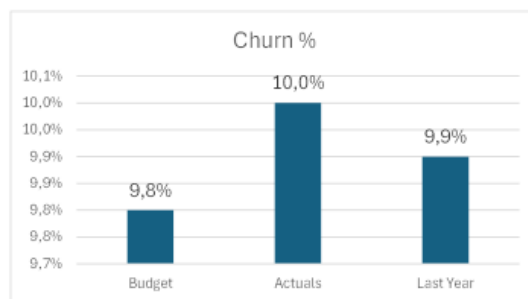
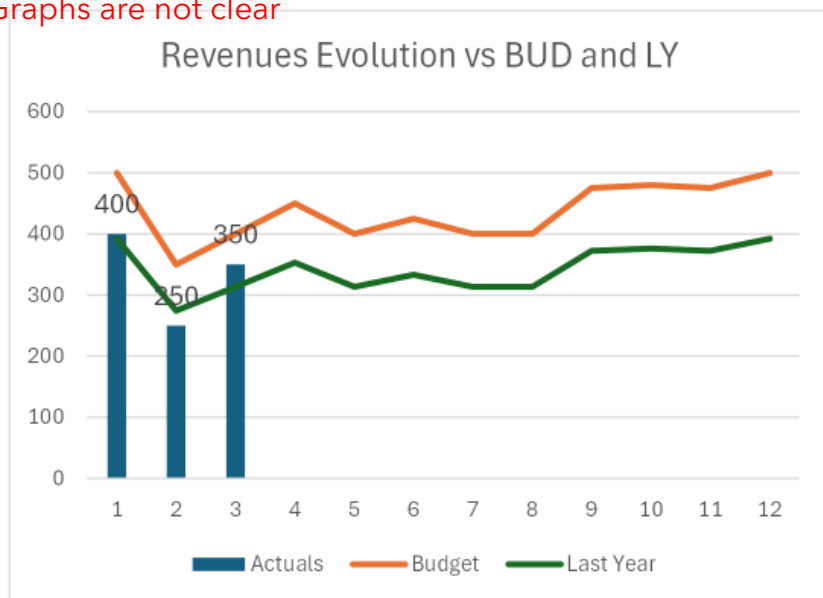


What's wrong with this slide?

Reporting 03/2025

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%

Graphs are not clear



P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

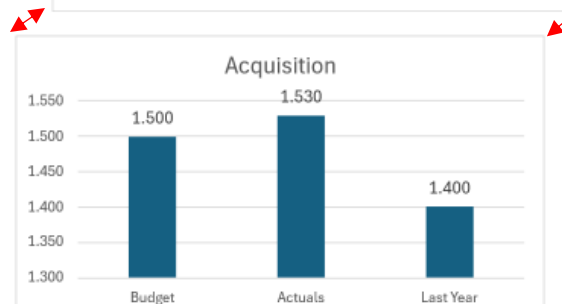
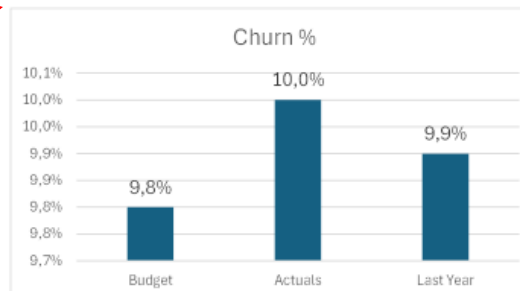
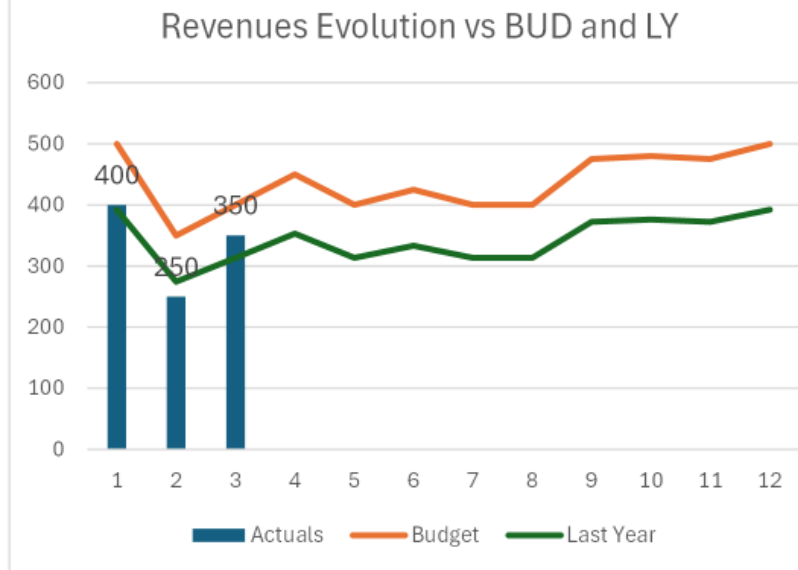
- Gross Gains increased vs LY (+130) and are better than budget (+30)

What's wrong with this slide?

Reporting 03/2025

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%

Misaligned graphs



P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

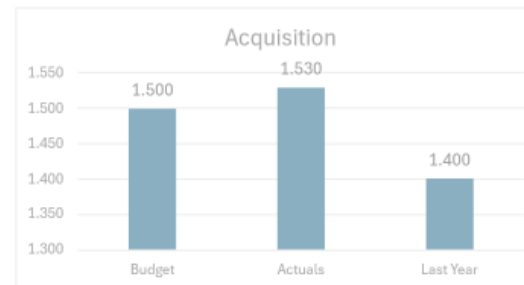
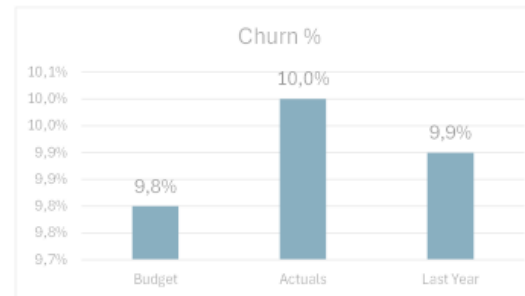
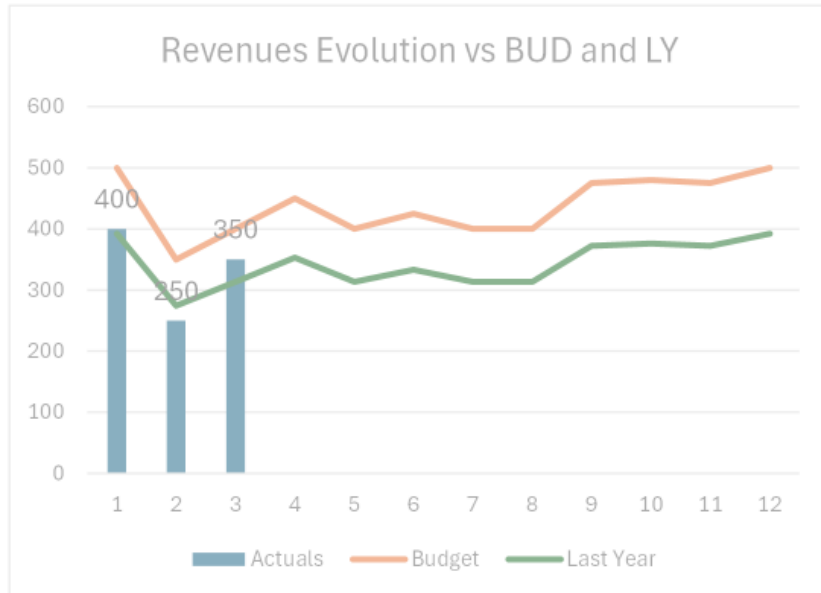
- Gross Gains increased vs LY (+130) and are better than budget (+30)

What's wrong with this slide?

Reporting 03/2025

Small and long text with no meaning

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%



P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

Acquisition

- Gross Gains increased vs LY (+130) and are better than budget (+30)

What's wrong with this slide?

Limited white space

Reporting 03/2025

	Actuals	Budget	Variance	Var %	Last Year	Variance	Var %
Revenues	1.000	1.250	-250	-20%	980	20	2%
Margin	750	950	-200	-21%	740	10	1%
Margin %	75%	76%	-1%	-1%	76%	-1%	-1%
OPEX	-350	-350	0	0%	-325	-25	8%
EBITDA	400	600	-200	-33%	415	-15	-4%
EBITDA %	40%	48%	-8%	-17%	42%	-2%	-6%

P&L

Revenues

Gap of 250kEUR vs Bud is due to

- Unfavourable gap on B2B market (-100k EUR)
- Unfavourable gap on B2C No Touch market (-75k EUR)
- Favourable variance on deliveries (+35k EUR)
- Unfavourable variance on High Touch products (-50k EUR)
- Unfavourable variance due to an overaccrual in December '24 (-50k EUR)

Margin

- Despite lower COGS, we have a higher unit cost (2 vs 1,5 budgeted)

OPEX

- As Budgeted
- Higher than last year on payroll expenses (-25k EUR)

Drivers

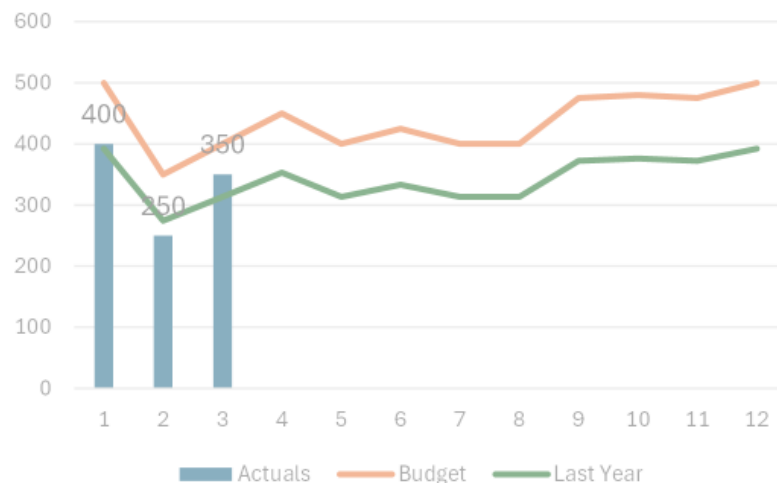
Churn

- Churn increased vs Budget (+0,2%) and vs LY (+0,1%)

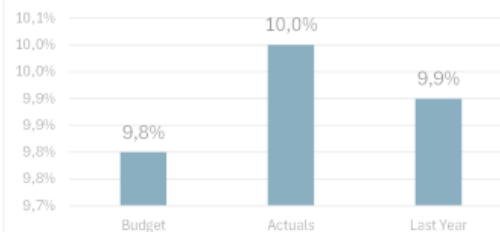
Acquisition

- Gross Gains increased vs LY (+130) and are better than budget (+30)

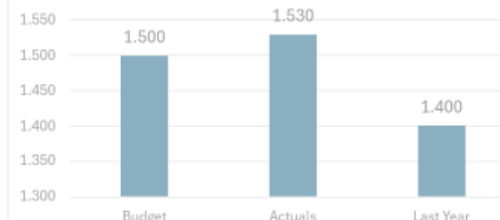
Revenues Evolution vs BUD and LY



Churn %

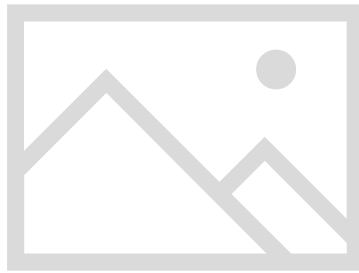


Acquisition



HOW DO YOU **FIX THIS
PRESENTATION THEN?**

...for most audiences



**Competitive-led churn
impacts our revenues
negatively**

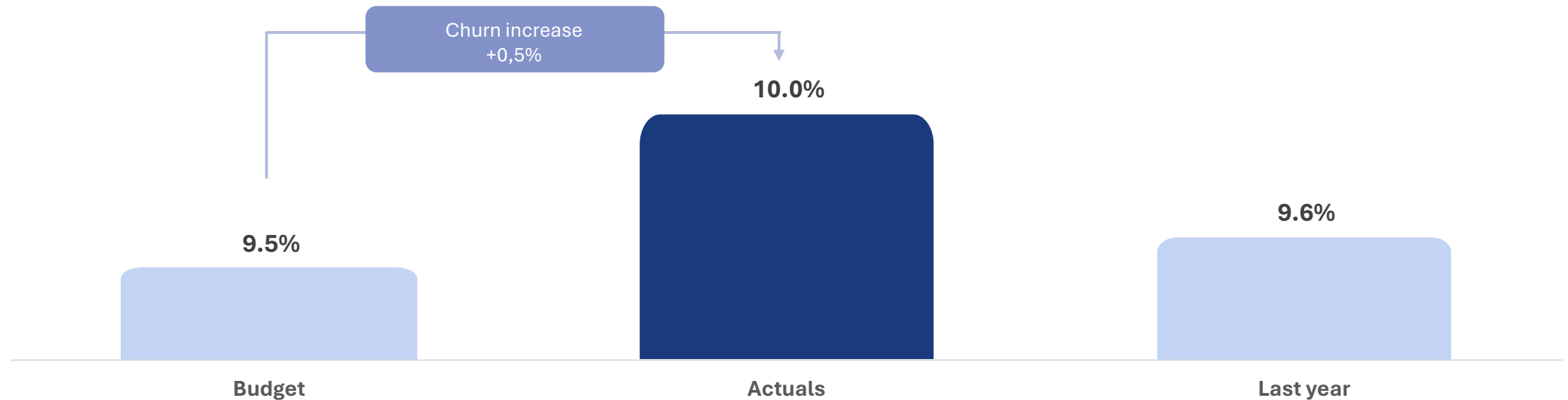
Competitive pressure has a major impact on our revenues



Churn both on B2B and B2C lead to a risk of 1,5m EUR

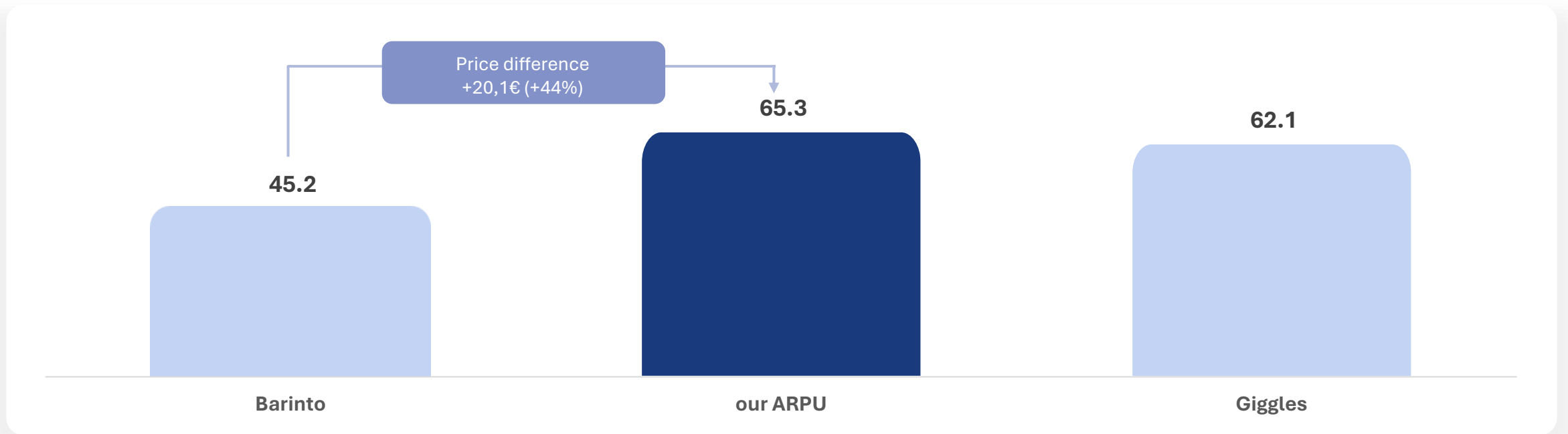
- B2B segment is under pressure with the loss of Ultrasound (-90k EUR)
- B2C No-Touch segment is price sensitive since Barinto's new offers (-125k)
- Margin is impacted by the increase in licence costs but offset by lower volumes

Ultrasound churn highlights our new **B2B** competition



- › Since December, our competitor became aggressive on B2B, reaching out to our main customers
- › Ultrasound represents 0,6m EUR full year but the full portfolio at risk could go up to 2m EUR
- › Sales is analysing most sensitive customers and is preparing a tailored approach

Barinto is gaining B2C market share through price war



- › Price aggressive Barinto is gaining traction on the B2C market since their new offer
- › So far, lost portfolio leads to a full year impact of 0,6m € but the the full risk is estimated at 2m €
- › Marketing team must detect price-sensitive portfolio and offer a contingency plan

Recommendations and Next steps



Sensitive B2B approach



List/contact sensitive customers

Account manager to scope risky portfolio and determine actions



Outcome

This could prevent from losing an addition 1,4m € on B2B



Potential costs

For the time being, no additional discount is foreseen. Update in April 2025



Contingency B2C



Prepare an action plan for B2C

Marketing to analyse price-sensitive portfolio and offer a backup plan



Outcome

In addition to prevent loss of 1,4m€, we might attract a new customer base



Potential costs

Agency and consulting costs for the initiative will amount to 0,3m €



Cost cutting



Decrease non essential costs

A solution, not recommended at this stage, is to cut non essential spendings



Outcome

While spending could decrease 0,3m€, this would delay our projects



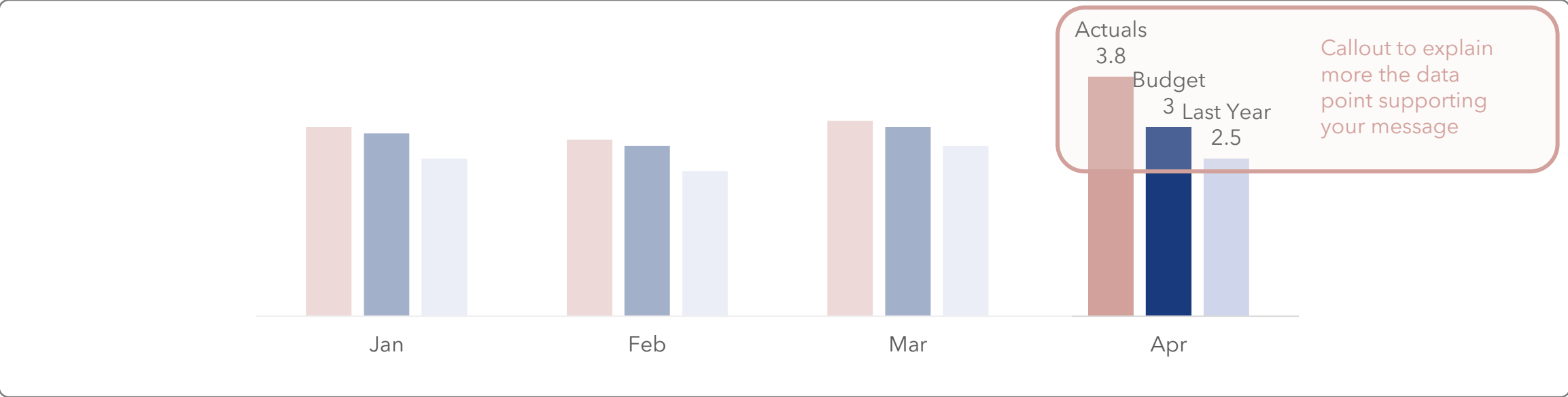
Potential costs

No additional costs

Slide Design best practice

Headline

A focused data visualisation



- Explanatory text
- Explanatory text
- Explanatory text
- Explanatory text.

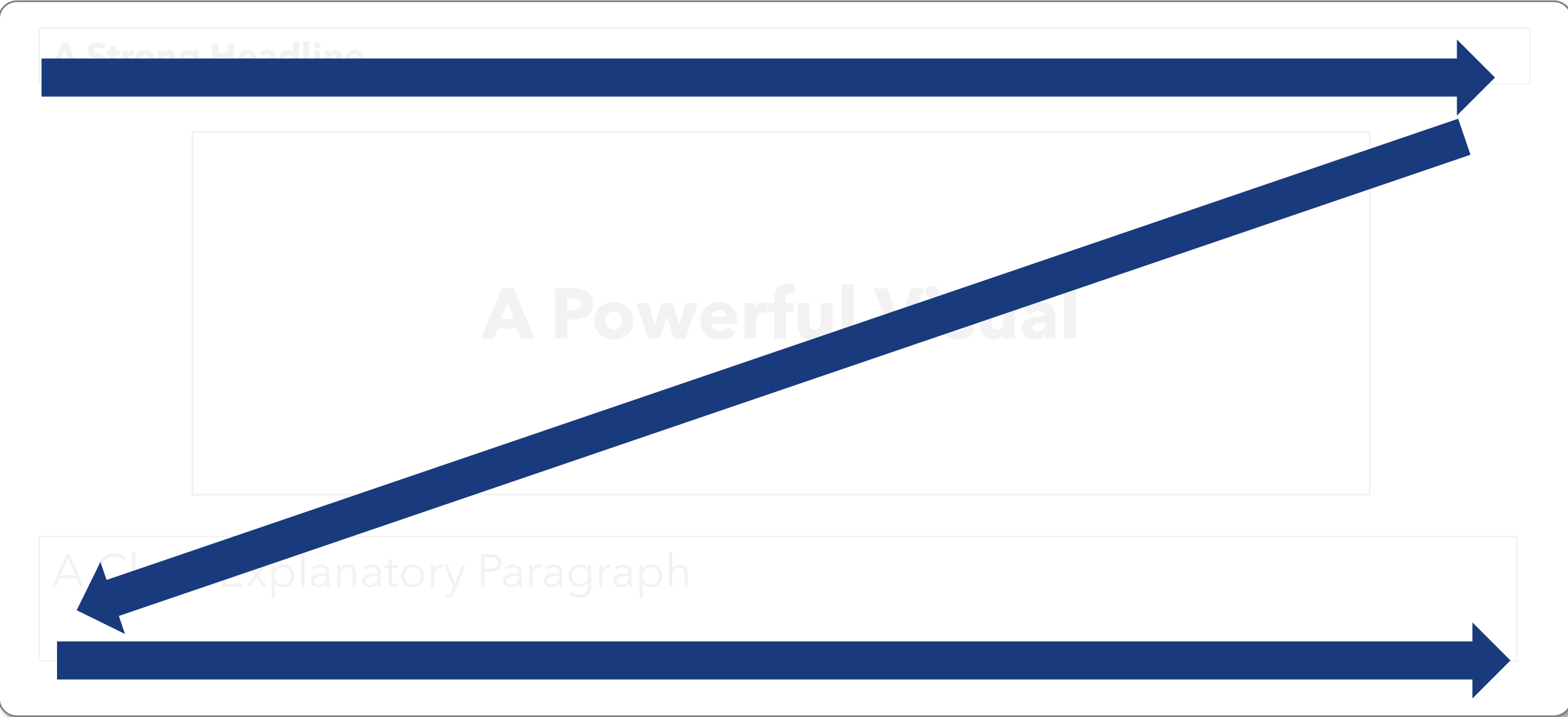
How to fix this

A Strong Headline

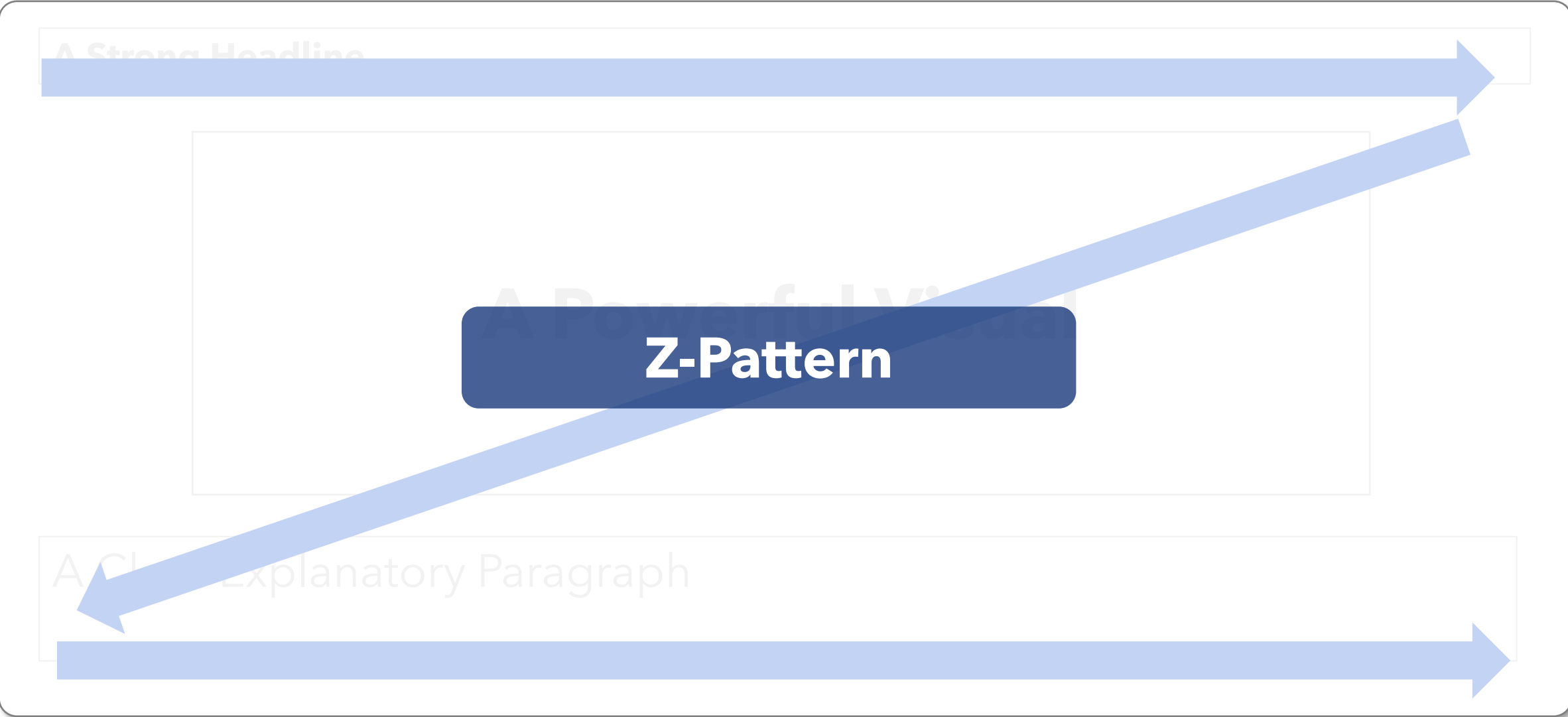
A Powerful Visual

A Clear Explanatory Paragraph

How to fix this



How to fix this



How to fix this

A Strong Headline

A Powerful Visual

A Clear Explanatory Paragraph

A blurred background image of a business meeting. Three people are seated around a wooden table. A laptop is open in the center, displaying a dashboard with various charts and graphs. The scene is brightly lit, possibly from a window, creating a warm, professional atmosphere.

**A strong headline must
fit on your T-shirt**

How to find the **BIG IDEA**

From -> To

A

What they're thinking now

Your BIG IDEA is the distance between both

B

What you want them to think when they walk out

Commander's Intent



The T-Shirt Rule



How to structure the **BIG IDEA**

What?

Describe **what** you observed in your analysis

*What is the topic and the analysis?
This part is technical so it should be **clear** and **concise***

So What?

Identify the **implications**

*Why should your audience care?
This is the **emotional** part
Tension must be high*

Now What?

Define a course of **Action**

*What are the next steps?
Give **recommendations** but always keep options open*

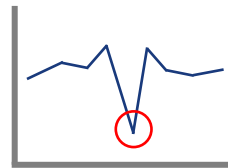
How to make your **BIG IDEA** a Headline

Contrasts/Comparisons



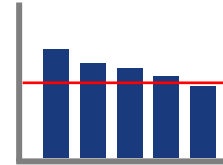
Highlights opposing trends and invites discussion on underlying causes

Surprise/Outliers



Draws attention to anomalies that may need further investigation

Milestones/Thresholds



Celebrates or flags key achievements or breaches in critical thresholds

Trend Summaries



Concise captures the overarching pattern over time

Implication Titles



Focuses on the potential impact of the data, pointing forward

Call to Action



Takes the recommendation approach further by encouraging immediate response

Myth-Busting



Challenges assumptions and reframes the narrative based on data

How to fix this

A Strong Headline

A Powerful Visual

A Clear Explanatory Paragraph

How to fix this

A Strong Headline








A Powerful Visual

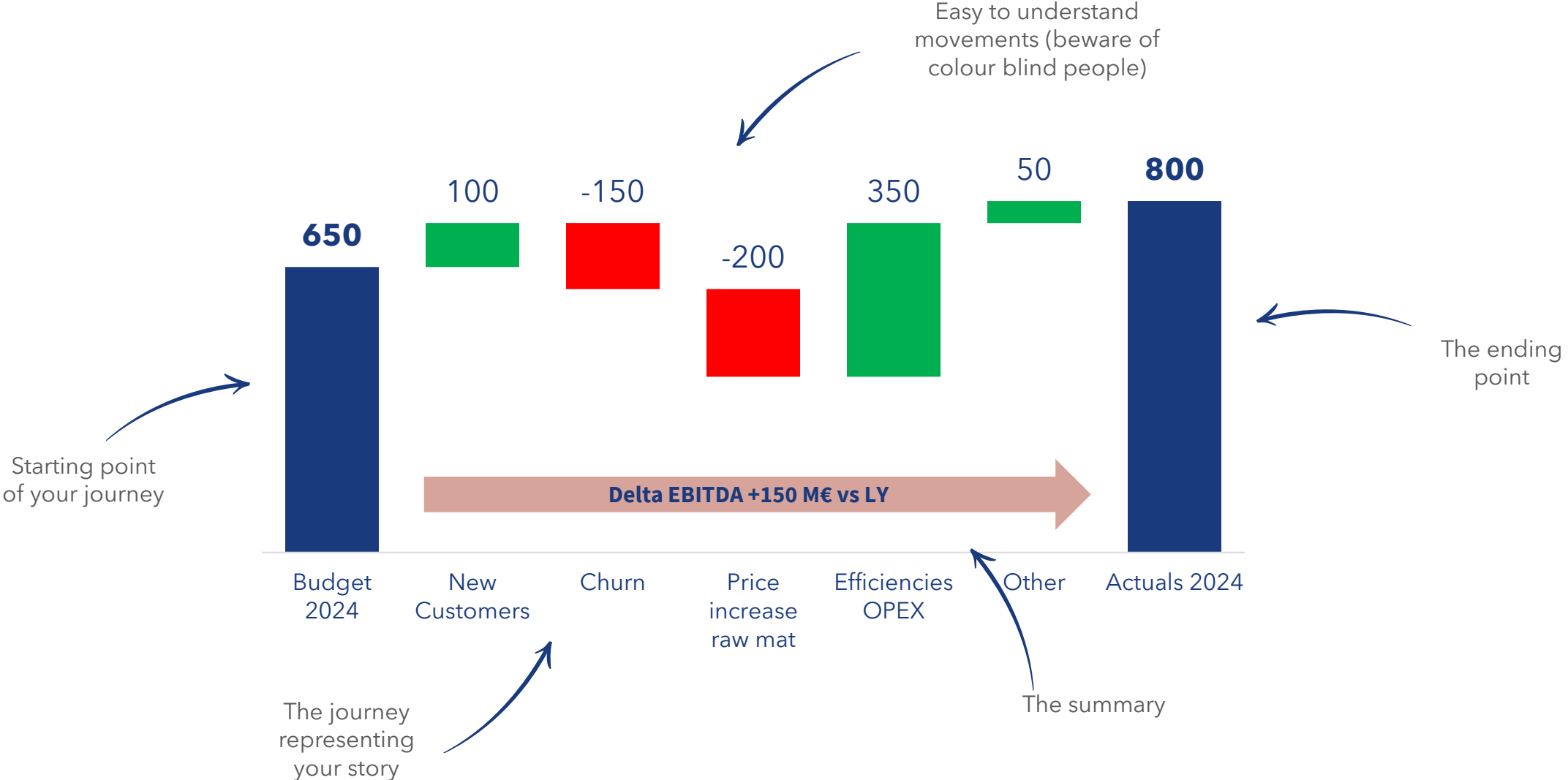
A Clear Explanatory Paragraph

Powerful visuals
print the message in
your audience's brain

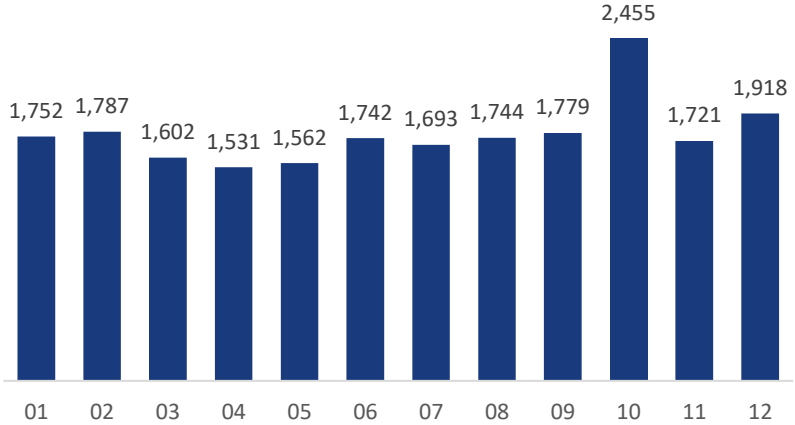
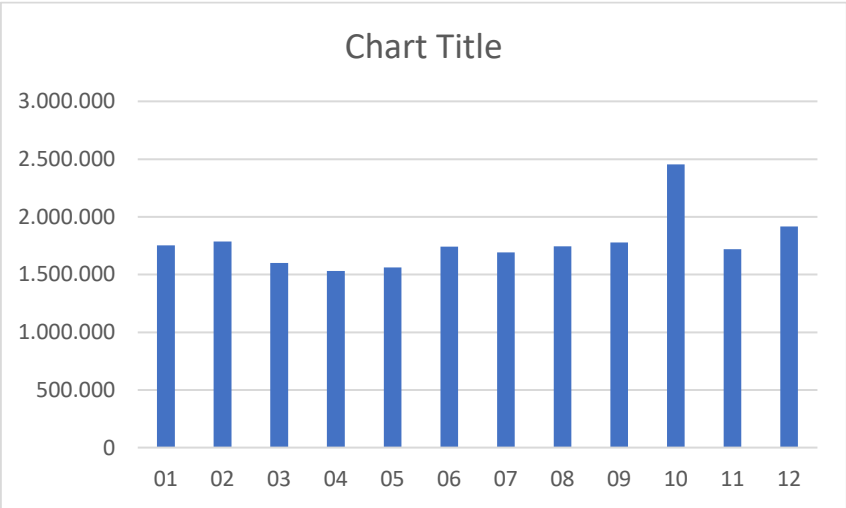
Choose the Right Chart Type

	Line Chart	Column Chart	Indicator	Stacked Chart	Waterfall Chart
What?					
Goal	Show changes	Compare and contrast categories	Highlight a single measure	Show subcategories	Compare multiple two scenarios
Type of data	Continuous metrics	Proportions	KPI's or Important metric	Part of a whole	Sequential changes
Type Chart	Comparison	Comparison	Information	Composition	Change
Time stamp	Over time	Over time	Static	Over time	Over time

The most used graph in finance

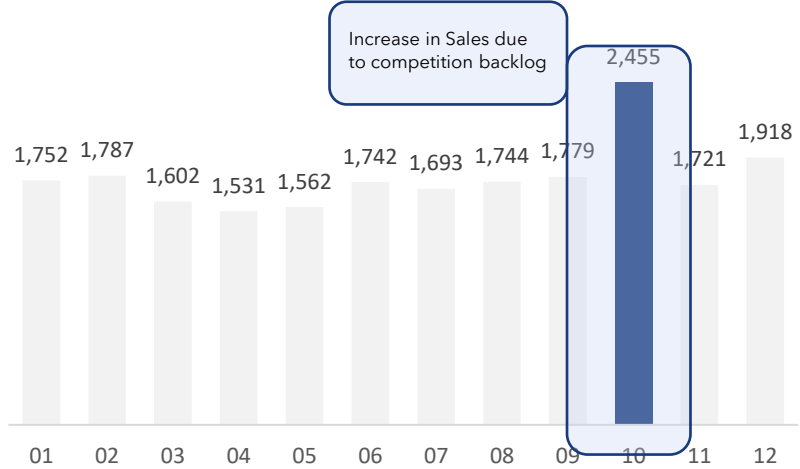
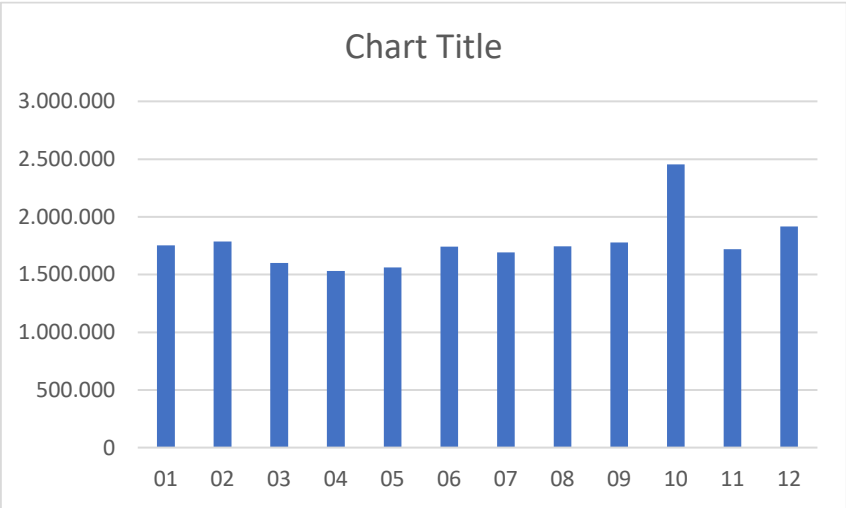


Remove all unnecessary ink



- ✗ No border
- ✗ No axis labels
- ✗ No gridlines
- ✗ No title

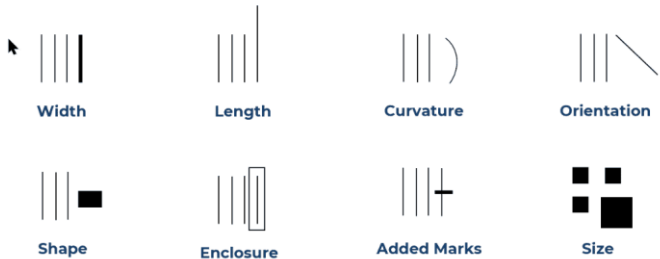
Highlight Key Data Points and Annotate



- Focus on the data that supports only your message
- Use highlights and annotations to draw attention to critical points.

Don't show everything

Pre-Attentive Attributes



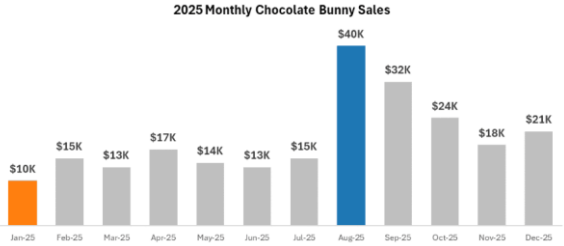
Highlighting



Colours



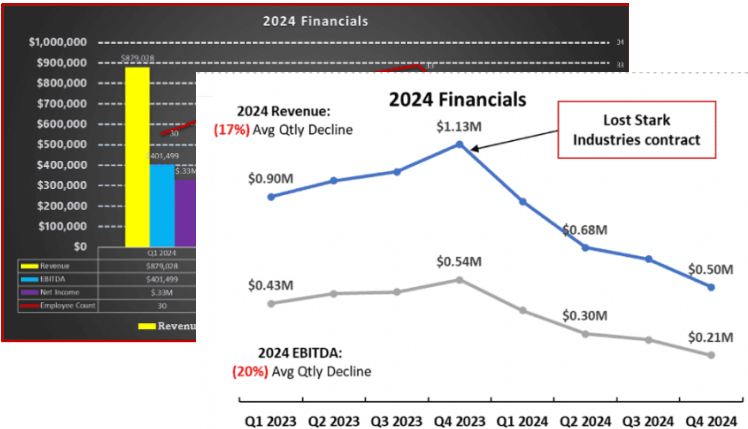
Hue



Gestalt Principles



3-seconds rule



Use colours appropriately

Intuitiveness



Think about the association of your colours



Clarity



Must be easy to read, even for untrained people



Moderation



Stay simple and logical, it's not a painting



Classification



Avoid gradient colours in the same graph



Consistency



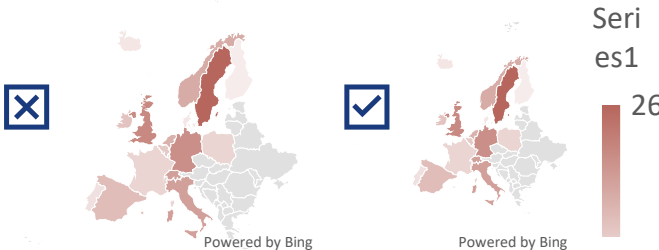
Use the same colour code throughout the presentation



Explanability

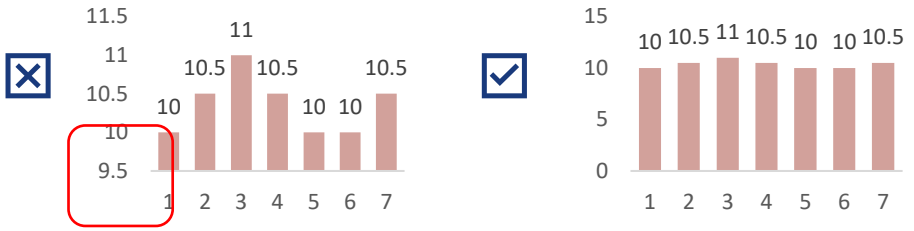


Use legends or labels (better) to ease understanding

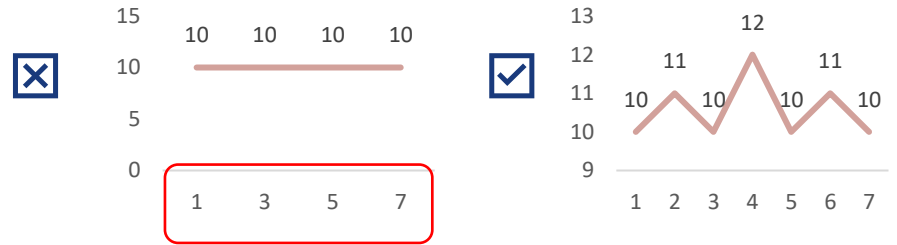


Misleading behaviours

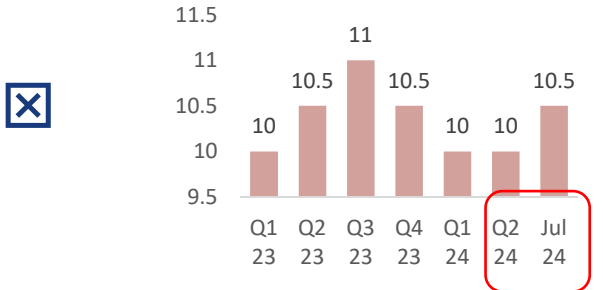
Truncated Y-Axis



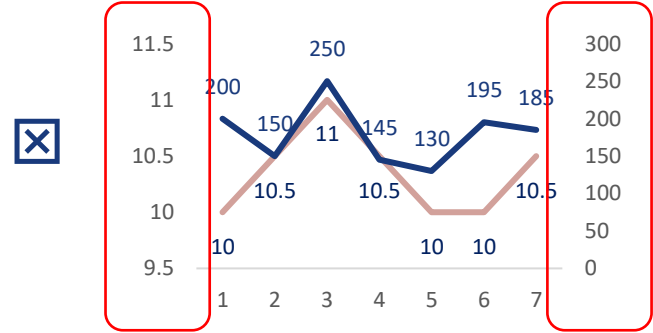
Cherry-Picking Data



Inconsistent Time Intervals



Inconsistent or Misleading Scales



How to fix this

A Strong Headline

A Powerful Visual

A Clear Explanatory Paragraph

How to fix this

A Strong Headline

A Powerful Visual

A Clear Explanatory Paragraph

**Don't write a whole
novel in your
explanatory paragraph**



The Golden Rules of Structure



One Idea Per slide

Limit each slide to one core message to ensure clarity and avoid overwhelming the audience



The 5-Second Rule

The audience should be able to read and understand the slide in 5 seconds or less



The 5/5/5 Rule

Limit text to a maximum:

- 5-6 words per line
- 5-6 lines per slide
- 5-6 text-heavy slides in a row



Bullet Points

Bullet points help people to scan through the text more easily

Designing for Readability



Large Font Size

Use at least 24-point font for body text, and 35-45 points for titles



Use Sans-Serif Fonts

Select easy-to-read fonts such as Arial, Helvetica or Calibri



High Contrast

Use dark text on a light background or vice versa.
Avoid patterned backgrounds



Left alignment

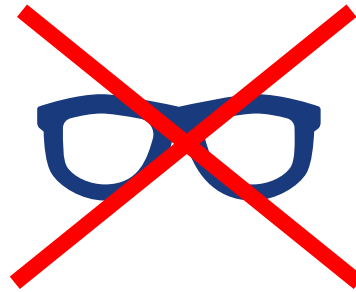
Align text to the left rather than centering it, as this is fast to read

Presentation Killers



All-Caps

Avoid writing in all-capital letters as it reduces readability (and feel like you're screaming)



Reading Slides

Do not read word-for-word from the slide

The slide is for the audience, your voice provides the detail



Paragraphs or Text

Do not put full paragraphs on a slide. If it has more than 10 words, consider turning it into a handout

The **Exception**: Walking Decks (Self-Explanatory)



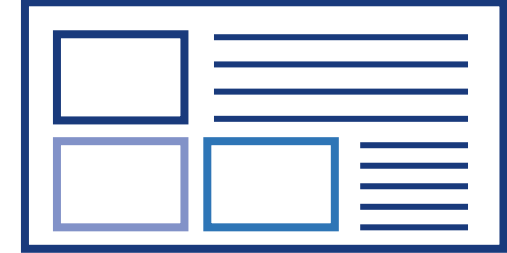
The Context: Independent Reading

If the slides are to be read independently (a “walking deck”) rather than presented live, you may include **more details**



The Format: Readable Paragraphs

Use subheadings to break up text and short, 3-4 line paragraphs to **provide context** while still aiming for conciseness



The Limit: Deep Dives in Notes

Include in-depth information in the “Notes” section of the “PowerPoint”, not on the slide itself

**HOW CAN WE USE
AI TO HELP US
WITH VISUALS?**



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

Welcome Soufyan, how can I help?

You are using Copilot Chat with GPT-5 with standard access. Quality and performance may vary depending on service availability. [Learn more.](#)

Message Copilot

What's the latest from Microsoft Security, organized by emails,...

Stay informed

Summarize file

Get an overview

Help me prepare for my day

Get going faster

List key points from AI use cases to show at Rydoo.xlsx

Understand the main points

Analyze this text and make suggestions on how to improve...

Sharpen your writing

When's my next meeting with person?

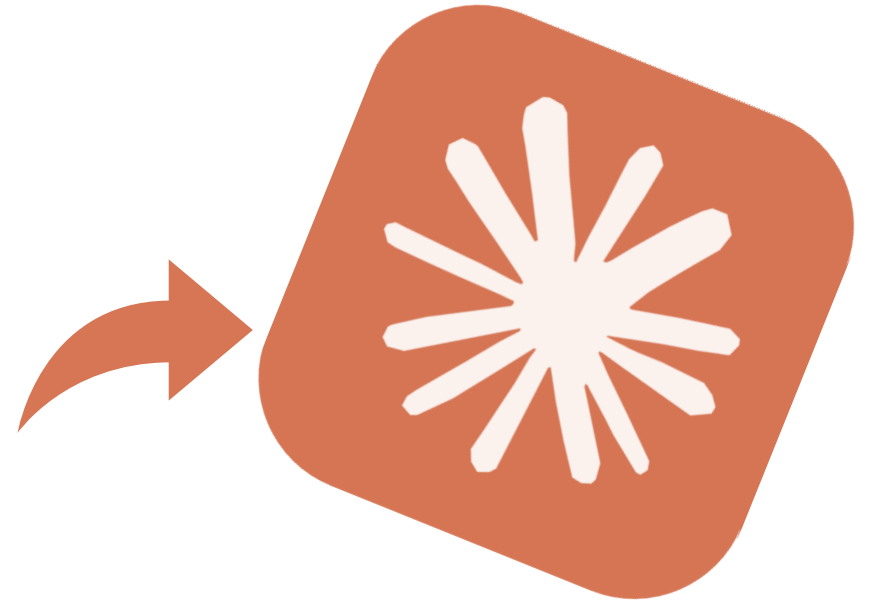
Get calendar info

What should be on my radar from emails last week?

Summarize email

Draft an email to my team asking for feedback on Calendar

**PREPARE YOUR
SLIDES WITH
CLAUDE**



File Home Insert Draw Design Transitions Animations Slide Show Record Review View Developer Help

Record Present in Teams Share

Clipboard Slides Font Paragraph Drawing Slido Editing Voice Add-ins Copilot Claude

Paste New Slide with Copilot Reset Section Layout

B I U S Aa Font Paragraph Drawing Slido Editing Voice Add-ins Copilot Claude

Shape Fill Shape Outline Shape Effects Arrange Quick Styles

Find and Replace Replace Fonts Select Dictate Add-ins Design Suggestions Copilot Open Claude



1

Click to add title

Click to add subtitle

Click to add notes

Claude

Beta

Take actions in PowerPoint

Summarize this deck

Add a chart

Lay out this slide a different way

Add a slide with more detail

We've doubled usage in Claude in Excel and Claude in PowerPoint until March 19, 2026 - enjoy!

Slide 1 selected

Reply

Opus 4.6

PRE-MEETING READING

1. Please review the agenda for the meeting.

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

2. Read through the attached report and familiarize yourself with the key points.
 3. Prepare questions/topics you would like discuss.
- Be prepared to provide any updates from
Department.

- ChatGPT 5 Thinking ▾
- 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
- SharePoint or Other Tools
- Soufyan Hamid Plus

Good to see you, Soufyan.

Write or code

+ Thinking ▾ Canvas



🎤 🔊



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




**CREATE ANIMATED BAR CHARTS TO
VISUALISE CHANGES OVER TIME**

 Hi Soufyan
Where should we start?

Enter a prompt for Gemini  

+  Tools Fast  

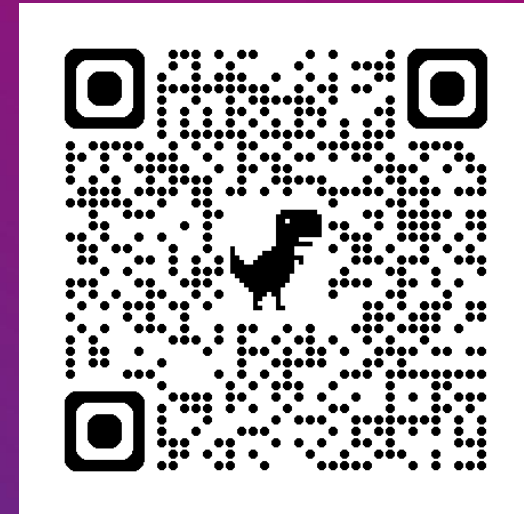
-  Create image
- Help me learn
- Boost my day
- Write anything

**NOW YOU KNOW
HOW TO REPORT**

**ARE YOU READY TO
INFLUENCE?**

**NOW YOU
KNOW HOW
TO REPORT**

**ARE YOU
READY TO
INFLUENCE?**



Come to our next Masterclass
**Financial Storytelling
Maturity Model**