

## Good prompting: An AI cheat sheet for the FD

"A good prompt is clear, specific and gives the AI enough context to understand exactly what you want." - ChatGPT

### Top Tips

- 1 Give the AI context. Context could mean information about a task, your business, the challenge or the output.
- 2 Give it a persona. "You're a CFO...", "You're an FD in insurance...", "You're a tax specialist at a Big Four accounting firm..."
- 3 Give it a format. "I want this presented in a table", "I want you to draft a memo", "I want something like the attached example".
- 4 Give it some constraints. "Don't answer if you can't be sure", "Limit yourself to 200 words", "Only use the facts I've given you – no outside information".
- 5 Break down the task. "Complete the actions in step 1, then come back to me for approval before you start step 2."
- 6 Define your prompt. "I like this but I don't like that. Try again."
- 7 Ask AI. "What information would you need to perform this task better?", "Ask me up to 5 questions that will help with your response."



#### A WARNING:

Be cautious about putting sensitive data into AI tools you don't control. Think GDPR and company policy. If in doubt, anonymise it.

### Example #1

You're a CFO at a UK-based retail group, preparing for a board meeting. Summarise the key financial highlights from the attached Q2 report in no more than 200 words. Present the output as a bullet-pointed executive summary suitable for non-finance stakeholders. Only use the data provided. Do not add external assumptions. Ask me if you need clarification before proceeding.

### Example #2

Act as a finance director in a mid-sized manufacturing firm. I want a table comparing three cash flow scenarios for the next 12 months: baseline, optimistic, and worst-case. Use simple assumptions and clearly label each scenario. After the table, list three key risks and how we might mitigate them. Keep the language suitable for a senior leadership team.

