

AI Prompt Library • Finance & Operations

Practical GenAI prompts for finance and operations professionals • Aurorae Group, LLC

This reference provides ready-to-use GenAI prompts mapped to core finance and operations functions. Each prompt is a starting point — customize the bracketed fields for your organization and refine the output before use. AI-generated content should always be reviewed for accuracy before sharing or acting on it. These prompts are designed for use with current generative AI tools including ChatGPT, Claude, and Gemini.

Financial Reporting & Analysis

1	Use Case	Generate a clear, executive-ready summary of financial data that highlights key trends and flags items requiring leadership attention.
	Sample Prompt	<i>You are an experienced financial analyst preparing a brief for senior leadership. I am going to provide financial data for [period, e.g., Q3 2026]. Please produce a concise executive summary that: identifies the 3 most significant trends or variances, explains what each means for the organization in plain language, flags any line items that warrant immediate attention, and recommends one action for each flagged item. Tone: direct and data-grounded. Avoid jargon. Format with a brief intro paragraph followed by clearly labeled sections. [Paste data here]</i>
	Value	Translates raw financial data into leadership-ready insights in a fraction of the time. Helps finance teams communicate more effectively with non-financial audiences.

2	Use Case	Draft a budget variance explanation that is clear, factual, and appropriate for a board or leadership report.
	Sample Prompt	<i>You are a finance professional drafting a budget variance explanation for a [board report / leadership dashboard / funder report]. The [expense / revenue] line for [category] is [over / under] budget by [amount or percentage]. The primary reasons are [list 2-3 reasons]. Please draft a 2-3 paragraph explanation that: states the variance factually, explains the underlying reasons clearly, and describes what action is being taken or planned. Tone: transparent and professional. Do not use hedging language that obscures accountability.</i>
	Value	Saves time on narrative writing while ensuring variance explanations are clear, consistent, and appropriate for the intended audience.

3	Use Case	Summarize benchmarking or market data from multiple sources into a concise, actionable management briefing.
	Sample Prompt	<i>You are an experienced financial analyst. I have gathered [salary / cost / market] benchmarking data from [list sources, e.g., industry surveys, peer organization reports]. Please synthesize this data into a short executive briefing that: summarizes the key ranges and findings, highlights where</i>

		<i>our organization sits relative to the benchmark, identifies the most significant gaps or risks, and recommends 1-2 actions for leadership consideration. Format as a 1-page brief with clear sections. [Paste data here]</i>
	Value	Accelerates the process of turning benchmarking data into strategic recommendations. Reduces the time between data gathering and leadership decision-making.

Operations & Process

4	Use Case	Draft a clear, step-by-step process documentation for an operational workflow that staff need to follow consistently.
	Sample Prompt	<i>You are an experienced operations writer. I need to document the process for [specific workflow, e.g., processing vendor invoices / submitting expense reports / onboarding a new vendor]. The key steps are: [list steps in rough order]. Please write this as a formal process document with: a brief purpose statement, a list of who this process applies to, numbered step-by-step instructions written in plain language, and a note on any common errors or exceptions to watch for. Tone: clear and instructional. Format for easy reference — someone should be able to follow it without asking for help.</i>
	Value	Standardizes operational procedures and reduces errors caused by inconsistent practice. Saves time in staff training and onboarding.

5	Use Case	Identify inefficiencies in a described workflow and suggest concrete improvements.
	Sample Prompt	<i>You are an experienced operations consultant. I am going to describe a current workflow at our organization. Please: identify the 3-5 most significant inefficiencies or friction points, explain the likely impact of each (time lost, error risk, staff frustration), suggest a practical improvement for each, and note which improvements could be implemented quickly versus which require more planning. Be specific and actionable — avoid generic advice like 'improve communication.' [Describe workflow here]</i>
	Value	Brings an outside analytical lens to operational problems that internal teams are often too close to see clearly. Generates improvement options that can be evaluated and prioritized by leadership.

6	Use Case	Draft a vendor or contract evaluation summary that captures key terms, risks, and a recommendation.
	Sample Prompt	<i>You are an experienced operations manager with contract review experience. I am going to provide key details from a vendor proposal or contract. Please produce a summary that covers: what the vendor is proposing to provide, the key financial terms (cost, payment schedule,</i>

		contract length), the 3 most significant risks or concerns in the terms, any missing information that should be requested before signing, and a brief recommendation on whether to proceed, negotiate, or decline. Tone: analytical and direct. This summary is for internal use by leadership. [Paste vendor details here]
	Value	Gives leadership a structured, digestible view of vendor proposals without requiring them to read full contracts. Accelerates the procurement decision process.

Planning & Strategy

7	Use Case	Generate a structured scenario analysis to support a financial or operational decision.
	Sample Prompt	<i>You are an experienced financial planner. I need to evaluate [describe the decision, e.g., whether to expand a program / hire additional staff / change a vendor]. Please develop a three-scenario analysis: a conservative case, a moderate case, and an optimistic case. For each scenario: describe the key assumptions, estimate the financial or operational impact, identify the main risks, and note what conditions would make this scenario most likely. Format as a comparison table followed by a brief narrative summary. [Provide relevant context and data here]</i>
	Value	Structures complex decisions in a way that makes trade-offs visible and supports more confident leadership choices. Reduces the risk of anchoring on a single outcome.

8	Use Case	Draft a concise business case for a proposed investment, initiative, or resource request.
	Sample Prompt	<i>You are an experienced finance and strategy professional. I need to build a business case for [describe the proposal, e.g., purchasing new software / adding a staff position / launching a new program]. Please draft a structured business case that includes: a brief problem statement or opportunity description, the proposed solution and what it involves, the estimated costs (one-time and ongoing), the expected benefits (quantified where possible), key risks and how they would be mitigated, and a recommended decision and timeline. Format for a leadership or board audience. Tone: clear, evidence-based, and direct.</i>
	Value	Gives decision-makers a complete, well-structured view of a proposal without requiring the requester to start from a blank page. Improves the quality and consistency of resource requests across the organization.

Communications & Compliance

9	Use Case	Draft a clear, plain-language summary of a financial policy or compliance requirement for a non-financial audience.
	Sample Prompt	<i>You are an experienced finance communicator. I am going to paste in a section of our [financial policy / audit requirement / funder compliance requirement]. Please rewrite it in plain language for a general staff audience with no finance or accounting background. Preserve all required compliance elements. Use short sentences, active voice, and everyday vocabulary. Format as a brief overview paragraph followed by a bullet list of what staff need to know and do. [Paste policy section here]</i>
	Value	Improves staff understanding and compliance with financial policies. Reduces repetitive questions to finance staff by making requirements self-service accessible.

10	Use Case	Generate a funder or stakeholder financial narrative that contextualizes numbers within the organization's mission and impact.
	Sample Prompt	<i>You are an experienced nonprofit finance communicator. I need to write a financial narrative for [a funder report / an annual report / a board presentation]. The key financial data is: [provide figures]. The organizational context is: [describe recent activities, challenges, or achievements]. Please draft a 3-4 paragraph narrative that: presents the financial picture honestly and clearly, connects the numbers to mission and program impact, acknowledges any significant variances or challenges with appropriate context, and conveys organizational health and stewardship. Tone: transparent, mission-grounded, and confident.</i>
	Value	Bridges the gap between financial data and mission storytelling. Helps finance and program teams produce funder-ready narratives that build trust and accountability.

Important: Treat all AI outputs as first drafts requiring human review. Do not input confidential financial data, proprietary budget figures, or personally identifiable information into free or unapproved AI tools. Verify all figures independently before including AI-generated content in reports, presentations, or filings.