

Top ChatGPT prompts for finance

ChatGPT can help them by accelerating financial analysis, generating executive-ready summaries, automating routine recording, and brainstorming strategic financial plans.

Finance teams are focused on driving financial transparency, managing risk, and ensuring their organizations make informed, strategic decisions based on data. ChatGPT can help them by accelerating financial analysis, creating executive-ready summaries, automating routine recording, and conceptualizing strategic financial plans—all while keeping compliance and accuracy standards in mind.

Financial & Market Standards Analysis

ChatGPT helps evaluate financial performance and market positioning through benchmark analysis, competitor research, and industry analysis. Use web search or in-depth research to gain deeper insights in real time.

Use cases	Prompt
Financial performance assessment	Compare our financial performance to companies in the same industry [insert industry]. Use publicly available data to compare gross margin, net profit, and CAC. Present the results in a table with a source link.
Evaluate cost ratios relative to industry peers	I am the finance manager at [add company or industry]. Research the current SG&A and R&D expense ratios of 5 comparable companies in [add industry, e.g., SaaS, manufacturing, healthcare]. Provide a table of figures, source links, and a brief analysis of how they compare.
Competitive Fundraising Analysis	I am a CFO preparing for my next funding round. Research recent funding rounds (past 12 months) in [insert industry]. Summarize deal size, valuation, lead investors, and positioning. Format as a summary memo with clear citations and analysis.
Compare global tax regulations	I manage global financial regulatory compliance. Research and compare corporate tax rates and reporting requirements in [insert country]. Focus on tax incentives, reporting thresholds, and penalties. Provide comparison charts with links to official resources.
ESG Financial Strategy Assessment	I am updating my ESG financial strategy. Research how leading companies in [insert industry] integrate ESG into their financial plans and disclosures. Summarize 3–5 examples with their KPIs, reporting cadence, and financial impact. Include references.

Financial planning & forecasting

ChatGPT guides you through revenue forecasting, budget planning, and scenario modeling to inform strategic decisions. Upload data for deeper analysis and use reasoning models for more strategic insights.

Use cases	Prompt
Forecasting revenue trends	Forecast next quarter's revenue based on the last 6 quarters of data. Use trends from our [insert dataset or industry] to explain why. Present the forecast in a table and write a brief summary.
Draft budget assumptions for planning	Please help me draft the budget assumptions for the next annual plan. Context: [insert department/region/product information]. The output should include key assumptions, rationale, and any dependencies.
Cash flow scenario model	Model 3 cash flow scenario based on the following variables: [insert inputs such as revenue range, delays, or costs]. Output in tabular form with assumptions, key drivers, and estimated cash impact.
Conduct ROI analysis for the tool	Conduct an ROI analysis for the new [software or tool] we're considering. Context: [insert usage or pricing data]. Output should include payback period, assumptions, and a brief risk assessment.
Compare pricing strategies	Compare 3 potential pricing strategies for our [insert product or service]. Use historical pricing data from [insert previous year] for context. The output should be a side-by-side comparison table with pros, cons, and estimated impact.

Financial communication and reporting

ChatGPT facilitates executive communication, updates the board, and simplifies financial information for multiple audiences. Use Canvas for real-time editing.

Use cases	Prompt
Prepare discussion points for board meetings	Draft financial talking points for the upcoming board meeting. Use our [insert Q2 results or profit and loss summary] as input. Write the talking points in a bulleted format, focusing on leading indicators and risks/rewards.
Write an update summary for investors	Write a summary for our next investor update. Use highlights from [insert performance report or fundraising update]. Format the output as a concise email, suitable for external stakeholders.
QBR Financial Slide Content Draft	Draft the financial performance section for your next QBR presentation. Use the following input: [insert Q2 revenue, margin trend, notable changes in expenses]. Output as bullet points with a 1–2 line summary.
Convert analysis of variance	Convert this variance analysis into a summary that is easy for managers to understand. Source: [insert analysis]. Write in plain language with a brief explanation of why each variance occurred.
Summary of audit findings	Summarize the key findings from the internal audit. Use this document: [insert findings]. The output should be a management summary, with three themes and recommended next steps.

Operational Finance & Process Improvement

ChatGPT analyzes cost structures, identifies opportunities to improve efficiency, and strengthens financial performance. Uses reasoning models for deeper strategic insight.

Use cases	Prompt
Analyze cost reduction opportunities	Identify cost reduction opportunities from our recent budget report. Use analysis from [insert cost center or department] to evaluate. Provide a summary of the opportunities, projected savings, and any potential risks.
Assessing the suitability of M&A targets	Assess the financial and strategic fit of an M&A target. Use the following scenario: [insert company profile or key metrics]. The result should be a pros/cons comparison table and a 3-paragraph summary of risks/rewards.
Identify gaps in accounting processes	Review our current bookkeeping close checklist and suggest improvements. Use this document: [insert SOP or checklist]. The output will highlight bottlenecks and suggest process updates.
Review supplier payments for consolidation	Analyze supplier payments in this data [upload file]. Identify the top 10 suppliers by spend, detect any duplicates (e.g. similar supplier names) and recommend supplier consolidation. Export tables and brief summaries of cost reductions.
Strategic purchasing cost leverage	I am leading a finance initiative to reduce procurement costs. Research strategies used by Fortune 500 companies to reduce procurement costs without affecting supplier relationships. Present 3–5 strategies with examples of cost impact and citations.

Financial dashboards & visual storytelling

ChatGPT creates visual representations of financial data, processes, and strategic information for clarity and efficiency. Create visuals in ChatGPT for custom visualizations.

Use cases	Prompt
Visualize revenue growth channels	Create a revenue growth funnel visual with labeled stages: Attract ? Activate ? Revenue ? Retain ? Scale. Use a clean, modern style that fits executive finance presentations. Includes icons for each stage.
Illustration of the budget planning process	Create a horizontal process diagram that shows the budget planning cycle: Forecast ? Review ? Stakeholder Input ? Approval ? Monitoring ? Adjustment. Use corporate-style images with subtle colors and branding.
ESG Financial Impact Image	Create visuals that show how ESG initiatives can impact financial metrics. Show the link between sustainable investing, cost savings, risk reduction, and investor benefits. Use a modern design, green theme with arrows.
Dashboard Concept for Executives	Create a conceptual visualization of a CFO dashboard, showing high-level KPIs: Revenue, Gross Margin, Burn Rate, Run-of-Life, and Budget vs Actual. Use a clean layout with interim tables and figures.

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