

# How to Tell Your Financial Story

## in 6 easy steps

With access to more sophisticated data collection, reporting, and modeling tools, it's time to turn those numbers into a story. The basic story structure involves two parts—the introduction and the conclusion—comprised of six steps:

1



### Summarize the situation

**Set the scene.** Let your audience know what your aim is at the beginning of the story in order to establish context for everything that follows.

2

### Describe the specific opportunities or challenges that make it important to act

**Use financial data** to support the opening statements. Simple illustrative charts and other data visualizations will lend clarity and credibility to the points you're making.



3



### Outline the risks or consequences of **NOT** taking action

**Predictive models** from machine learning come in handy here, providing numbers to back up your claims.

4

### Communicate recommendations clearly and candidly, substantiated with data

**This is where numbers get their time to shine.** Using data and analysis, you can prove the value of your recommendations.



5



### Plainly outline the specific actions for the company to take

If your opening hooks the audience but the next steps are not clear, you'll lose your listeners. **Clear and specific recommendations of what's next** will eliminate confusion and push decision making forward.

6

### End with data and analysis that supports the benefits of following your recommendations

**If you've taken your audience on a meaningful journey** throughout your tale, they'll see how you arrived at your conclusions and why you're recommending certain courses of action and more readily jump on board with your proposed plans.

