Nominal

Prompting Guide for Finance Teams

AI is only as good as the prompts you give it. In finance, that means being precise, contextual, and outcome-oriented.

SMART
Prompting Framework

Element	What It Means	Example
S **Specific**	Include exact data sources, entities, or periods	"Use January P&L for entity 1"
M **Measurable**	Ask for trends, variances, summaries, or comparisons	"Summarize expense changes over 10 percent"
A **Action-oriented**	Start with verbs like "Generate," "Compare," "Flag"	"Generate a 3-month cash forecast from this dataset"
R **Realistic**	Stay within what AI can access or compute	"Based on this file" instead of "Based on all company data"
T **Time-bound**	Frame with dates, reporting periods, or relative time	"As of March 31" or "Last quarter only"

Prompt Do's and Don'ts

Do's

Give clear context:

> "Explain this variance between March and April."

Use accounting terminology:

> "Use cash flow categories when classifying."

Set format expectations:

> "Respond in two bullet points with percentages."

Don'ts

Leave out key dimensions:

> "Why did expenses increase?" (which expenses?)

Ask vague questions:

> "What happened here?"

Forget timeframes, thresholds, or accounts

Prompt Examples

Flux Analysis

> "Explain the 15 percent increase in COGS between February and March using accounting terminology. Keep the explanation under 30 words."

Anomaly Detection

> "Find outlier journal entries posted to account 6100 in April that are more than 50 percent higher than the historical average."

Journal Entry Review

> "Review this entry and flag any missing metadata. Suggest department or entity tags based on past entries."