

From Numbers to Narrative: Elevating your Writing in Finance



The role of today's financial professional has evolved far beyond reporting numbers. Whether you're a CFO, CPA or CEO – the need to communicate complex financial information in a clear and effective way is one of the key cornerstones to success. In the fast-paced business world, it's critical to bring financial information to life and find the story behind the numbers.

Executives, boards, and stakeholders are inundated with information and have to make quick decisions based on large amounts of information and data. Today's finance leaders are expected to act as strategic advisors, translating financial data into business insight for non-financial professionals and guiding critical decisions across the organization. Dry, technical writing slows decision-making while clear, structured communication accelerates it.

The ability to communicate and write in a way that connects to your audience is one of the most overlooked skills in today's workplace. The professionals who advance are those who are able to transform complex financial data into messages that are concise, compelling and incite a specific call to action.

Here are 6 ways for financial professionals to elevate their writing skills:

Define Your Purpose

Putting everything you know into a report or memo doesn't give your audience the bigger picture. It will just confuse them and make it easy for them to dismiss your ideas.

Plan your communication before you write it. Take the time to identify what you want to say, why you want to say it and to which audience. What is your main message? What's

your goal – to identify a problem or motivate an action? What’s the key audience take-away?

Replace Technical Language with a Business Tone

Financial professionals often use technical terminology and jargon because it feels precise. In the world of communication, clarity creates far more value than complexity. Does your writing make sense to the reader?

Business leaders don’t want accounting language - they want business impact. Look at your audience. If it’s fellow finance employees, then adopting a financial tone may suffice. Yet for others, show how the metrics affect them and what the result is for each specific audience. You’re essentially painting a picture for them with words to get a specific reaction. Remember - jargon creates distance. Plain language creates bridges.

Turn Numbers into a Narrative

Storytelling has emerged as a key ingredient to success in the business and financial world. The increasing complexity of data and requirement to influence a wide variety of stakeholders have made storytelling one of the most powerful strategies in the finance toolbox.

Stories bring financial information to life and play a vital role in driving strategic alignment across an organization. Start by understanding your audience and tailor your language to them. Structure your financial information into a story with a beginning, middle and end. Use visuals and analogies to bring the numbers to life. Focus on the “why” behind the numbers – not just the “what.”

Remember this key rule. Data informs and stories persuade. Your goal is to unlock the story hidden within the numbers.

Structure is Key

Busy professionals don’t read word-for-word. They scan. Well-structured writing builds credibility because it respects the reader’s time. Be sure to use: clear headings and sub-headings, short paragraphs, bullet points for complex points and a logical flow that translates into action.

Organize your text according to the four “Ps” structure. Position (what is the current situation), Problem (what is the main problem or issue), Possibilities (what are the solutions including the pros and cons of each) and Proposal (which solutions would you recommend and why). If your purpose is to incite a call to action, be sure to make it clear in your recommendation.

Edit and Fact Check Your Work

Strong writing means re-writing your work. Errors in finance can be costly, so before sharing any financial document take the time to edit your work. Double check your figures against source data. Confirm any names, dates or titles. Remove filler words and use spell-check, but be sure to read your text out loud to catch any mistakes.

The most effective finance communicators take the time to cut unnecessary words, tighten sentences and clarify the message. If you can remove 20% of the words without losing any meaning, do it.

Clarity often comes from subtraction, not addition.

Finish on a Strong Note

Be sure to include a confident ending. Restate your main point to be sure the audience understands your message. Your writing should bring a sense of closure. If one of your recommendations was to drive action, is it clearly stated in your communication? Have you provided a recap of your key points and tailored your work to the knowledge level of your audience?

As the role of financial professionals continues to evolve, the ability to write clearly and persuasively is a must-have as you climb the ladder to success. Your writing is part of your reputation. Every sentence counts. Numbers alone rarely drive decisions - insight does. And insight is only relevant when it is understood.

By mastering advanced writing techniques, financial professionals can move beyond number crunching to that of a trusted advisor playing a key role in shaping an organization's financial strategy. Those who master the art of translating complexity into clarity will not only be heard but will be trusted, valued, and invited to the table where conversations matter the most.