



Suhas Bhairav

AI Financial Report Translation for Managers

**Turn complex financial reports into plain language
for non-financial managers.**

Translate dense financial metrics into actionable,
plain-language insights for decisions.

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From Numbers to Narratives

Finance documents are dense; this guide shows how AI can convert them into plain language for non-financial managers. It outlines what to automate, what to human-review, and how to adopt in weekly steps.

Key move Start with a single report, map five terms, and run a 2-week pilot.

PRACTICAL CHECKLIST

- 01** Identify target reports: quarterly balance sheets and P&L statements most used by decision-makers.
- 02** Define plain-language mappings: revenue, cost of goods sold, operating expenses, and net income explained.
- 03** Automate extraction with a finance-appropriate LLM: pull numbers from ERP exports and generate plain summaries.
- 04** Add human review gates: a quick accountant sign-off for high-impact changes or unusual variances.
- 05** Establish governance: data sources, access, privacy, and audit trails for every AI step.

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Data, Tools & Roles

Outline the data you need from ERP exports, BI dashboards, and glossary of terms. Define tool roles, responsibilities, and ownership.

Key move Document approvals and data sources to avoid scope creep.

PRACTICAL CHECKLIST

- 01** Data sources: balances, income statements, cash flow, and supporting schedules in your ERP/GL system.
- 02** Data quality: ensure timeliness, accuracy, and consistency across periods before translation.
- 03** Security and privacy: restrict access to sensitive financials; log AI actions for audits.
- 04** Tools: consider Claude, ChatGPT, or other LLMs with retrieval and summarization capabilities.
- 05** Process: define prompts, templates, and channels for distribution to managers.
- 06** Owner: assign a quarterly owner for the translation project and monthly impact review.

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Weekly Adoption Plan

This plan offers small weekly milestones to implement AI translation in Finance. It includes metrics, approvals, and ownership checkpoints.

Key move Keep a human-in-the-loop for every high-stakes translated insight.

PRACTICAL CHECKLIST

- 01** Week 1: map a single report, define 5-10 glossary terms, and collect data samples.
- 02** Week 2: build a first translation prompt, run a dry-run, and compare to the original.
- 03** Week 3: add human review gate for anomalies; log feedback.
- 04** Week 4: publish plain-language summary to a manager channel; collect reactions.
- 05** Month 2: assess impact: time saved, comprehension scores, and usage.
- 06** Establish governance: update glossary, data sources, and approvals schedule.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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