How to analyse variances more effectively with Claude

Step 1. Use a project, or file location and give Claude the context first, by asking it to analyse the information and give the context back to you.

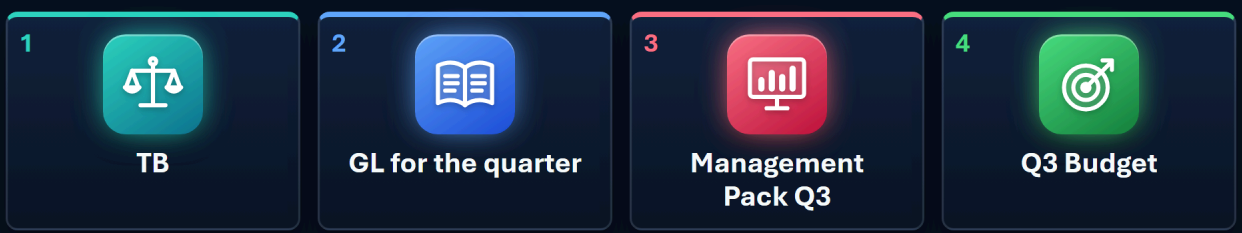
THE SCENARIO

Overheads came in over budget for the third quarter, and the board will want to know why.

Project work and context

Save reports in a project so that context is maintained and drift is reduced.

PROJECT: Q3 OVERHEAD VARIANCES



✕ WEAK PROMPT "Analyse the reports."

✓ **Good prompt**

Attached in the project are 4 reports, named:

1. TB
2. GL for the quarter
3. Management Pack Q3
4. Q3 Budget

The 4 reports serve as context only for now. Read each report and provide me a short summary of each and what their functions are.

As part of the summary, also provide me the GL codes that form part of each section in the financials, use the management pack and TB mapping.

Keep each report summary to 5 bullet points.

As a final check, prior to issuing the summary, review your own output against the context.

OUTPUT

Provide me the summary in a markdown file for my review.

Step 2. Use good prompt techniques with a prompt quality checklist

✓ Good prompt
☒ Weak prompt

✓ **Purpose and scope**	“My goal is to provide exact reasons why overheads ran over budget in Q3.” ☒ “Explain the variances.”
✓ **Evidence**	“Use the 4 reports in the project and the .md context file.” ☒ “Look it up.”
✓ **Definitions**	“The threshold is any variance >5% or in excess of R500,000.” ☒ “Show the big ones.”
✓ **Output**	“2 bullet points for each line item that ran over the threshold.” ☒ “Write it up.”
✓ **Uncertainty**	“Do not make assumptions, if you are uncertain, point those out.” ☒ “Give me the reason.”
✓ **Review**	“Check each calculation to the trial balance and provide me those calculations.” ☒ “Paste it straight into the pack.”