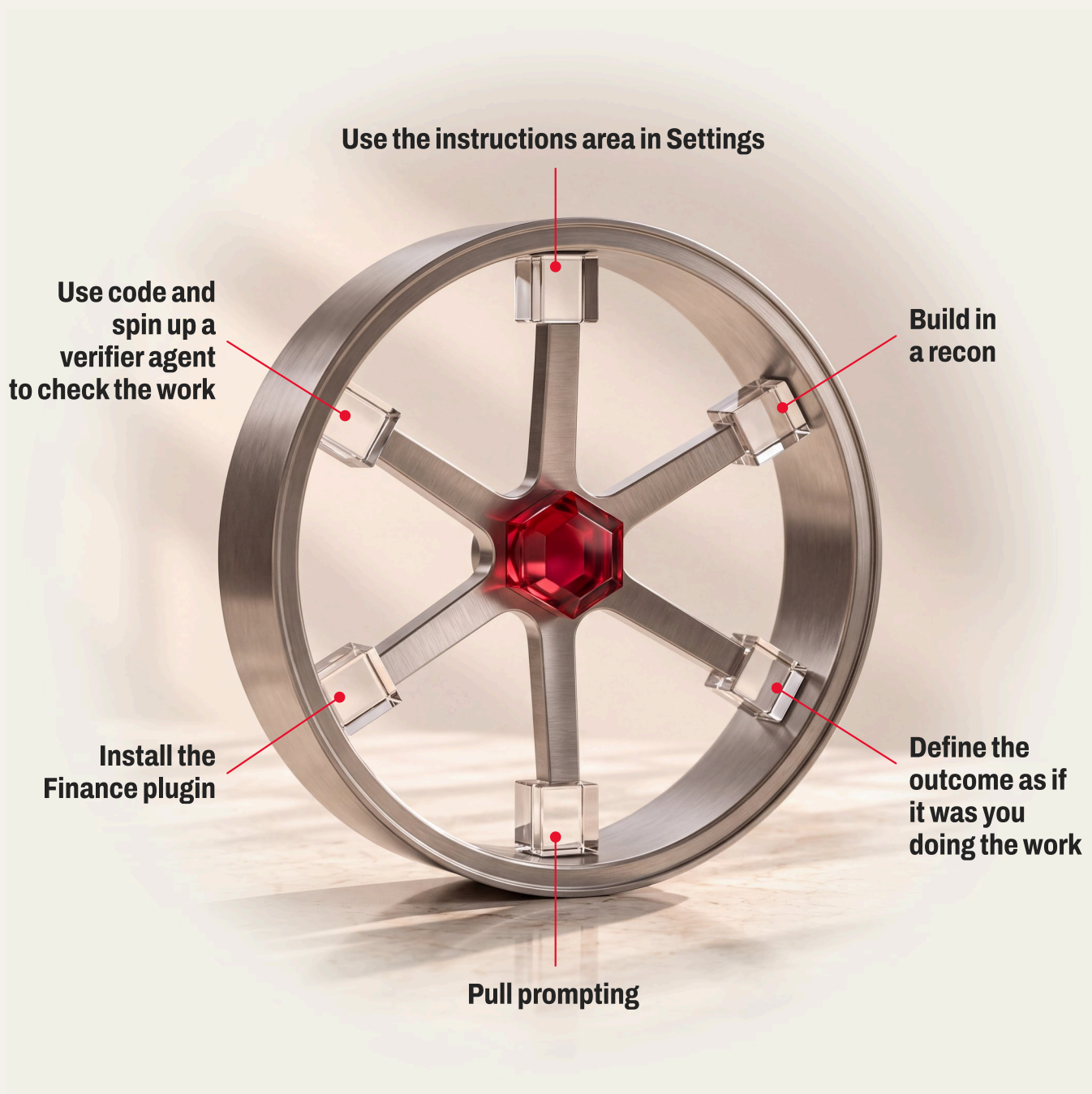


CLAUDE IN FINANCE

Six ways to use Claude better

Six habits I wish I had on my first day with Claude. I learnt each one the hard way, by redoing work Claude had handed me.



THE SIX, CLOCKWISE FROM THE TOP

Use the instructions area in Settings

It is called Instructions for Claude.
Write it once and it applies to every chat.

COMMUNICATION

Plain English, short sentences.
Never tell me what you think I want to hear.

OUTPUTS

A4, ready to send, no filler.

EXCEL

Never hardcode a value. Always use formulas. If one cannot be avoided, flag it and say why.

FACTS

Never assume. If it is not a cited fact, say so.

| Paste it, then make each line your own.

Build in a recon

Hold Claude to the standard you hold a junior to.

Add a Recon tab. Tie the closing balance back to opening balance plus interest less payments, and the detail back to the source. Show every difference. One cell reads OK only when every difference is zero.

Define the outcome as if it was you doing the work

You know how the interest should compound. Say it.

BEFORE

Build me a loan amortisation schedule.

AFTER, WITH MADE-UP FIGURES

Build a loan amortisation schedule: R1,200,000 at 11.75% a year over 60 months. Compound monthly on the opening balance. Equal payments at month end. The final payment clears the balance to zero.

Pull prompting

The one I would keep if I could keep only one.

Before you build anything, tell me how you would build it: the tabs, formulas and checks. Wait for my go-ahead.

I read the plan, correct it, then let Claude build.

Install the Finance plugin

In my experience, it makes a real difference.

Anthropic's Finance plugin adds commands for journal entries, reconciliations, income statements, variance analysis and SOX testing.

In Cowork: Customize, Plugins, Discover, Finance, Add.

Use code and spin up a verifier agent to check the work

Code does the sums. A second agent checks the first one's work.

Do every calculation in code, not in your head. Then spin up a verifier agent to check the work against the source and list every difference.

 **Claude drafts. I decide.**