

# Claude in Finance. Ten levers, four workflows.

## TEN EFFECTIVE LEVERS

- 1 Cowork is the most powerful tool.**  
 Desktop app only, included from **Pro (\$20/month)**. Claude works directly in Excel, PowerPoint, Slack, Gmail and Drive – and keeps context across all of them. The browser version offers only the classic chat.
- 2 Install the Finance plugin.**  
 Go to `claude.com/plugins/finance` → “Install in Claude Cowork”. Slash commands like `/dcf`, `/comps`, `/reconciliation`, `/variance-analysis`, `/journal-entry` and `/sox-testing` appear in your menu immediately.
- 3 Claude works alongside you in Excel.**  
 The sidebar lives in your workbook and reads cells, writes formulas, edits sheets. Claude pulls context from the data itself. You don’t need to describe the numbers first.
- 4 A Project keeps your context together.**  
 Load your chart of accounts, last close, and three of your own sample reports – once. Every chat in the Project knows these files automatically. Five minutes of setup that pays off every month.
- 5 Skills take repetition off your plate.**  
 A Skill is a saved instruction – for format, terminology or house style. Describe in the chat what Claude should learn. Claude builds the Skill for you.
- 6 Claude knows itself best.**  
 Ask Claude when you’re writing prompts too: “Write me a prompt for…” works surprisingly well. For cryptic error messages, paste a screenshot straight into the chat – faster than any Google search.
- 7 Dictate instead of typing.**  
 Speech is 3× faster than typing – 30–40 minutes saved per day. Claude has a built-in dictation feature; one click activates it. Even better: **Wispr Flow** (free tier, Pro at \$12/month).
- 8 Claude learns like a new colleague.**  
 Smart and well-read. But your terminology, your chart of accounts and your quality standards – those, Claude only learns once you show them. With more context – in a Project, a Skill or directly in the chat – the answer gets sharper.
- 9 For business use: start at Team.**  
 Only there: a Data Processing Agreement under GDPR Art. 28 and **no training on your data**. Projects and Skills can be shared across the team, billing runs centrally. Free/Pro/Max are for personal use: third-party personal data does not belong there.
- 10 Enterprise for governance and audit.**  
 SSO, central user management, audit logs, per-user spend limits, EU data residency on request. Available from 20 seats. Required in regulated industries – and at the latest, on your first GDPR audit.

## FOUR WORKFLOWS FROM PRACTICE

### USE CASE 1 · EXCEL SIDEBAR · CREATE A SKILL

#### Month-end variance commentary

Open your plan-vs-actuals workbook in Excel; start the Claude sidebar.

“Read the sheets ‘Actual’ and ‘Plan’. List the top 5 variances by cost center by volume: amount and percent, driver hypothesis in two sentences, flag unclear items as ‘open’. Format like the sheet ‘Template’. Cite the source cell for every number. Then turn this into a Skill as a blueprint for the coming months.”

**From next month on:** Claude applies the Skill automatically – no re-briefing needed.

### USE CASE 2 · COWORK · PROJECT · SLASH COMMAND

#### Bank reconciliation with `/reconciliation`

Load the open-items list and the bank statement into the Project. Open Cowork on the desktop.

“Apply `/reconciliation` to the open-items list and the bank statement from the Project. Match by document number and amount. List the unresolved items in a new sheet ‘Differences’ with a hypothesis per line (timing / missing entry / amount mismatch).”

**Finance plugin:** `/dcf`, `/variance-analysis`, `/sox-testing`, `/journal-entry` and `/comps` are also available as slash commands right in the chat.

### USE CASE 3 · COWORK · PROJECT · CREATE A SKILL

#### Earnings call digest with a template

Load an earnings call summary template into the Project. Drop the new transcript PDF into Cowork.

“Summarize the transcript using the template ‘Earnings Call Summary’ from the Project: CFO themes, analyst questions with answers, a Q&A table with timestamps. Cite source and timestamp for every quote.”

**Save as a Skill:** Once the structure works, save the template as a Skill. Next time, Claude applies it automatically.

### USE CASE 4 · EXCEL · COWORK · PROJECT · SKILL

#### From forecast to board memo

Forecast workbook saved in OneDrive and connected to Cowork via the Microsoft connector. In the Project: last quarter’s board memo and the Format Skill from Workflow 1.

“Update the forecast workbook with the new plan figures. Then write a board memo following the Format Skill: headline number, top 3 drivers vs. the previous quarter, two risk points for the next meeting. Comparison: last quarter’s memo in the Project.”

**The real value:** Cowork handles all three steps in one run – update the forecast, apply the Skill, write the memo. One prompt, no clicking between steps.