



Claude for Financial Analysis

- 1 Day Course
- Hands-on and Lecture

Course Overview

This hands-on workshop series teaches participants how to quickly transform unstructured business input into clear, structured, and actionable outputs using Claude, while advancing toward consistent, repeatable workflows and analytical rigor.

Participants begin with foundational prompting techniques and progress into configuring Claude using Projects, custom instructions, and structured patterns to enforce reliable output.

Through guided setup, real-world exercises, and structured workflows, participants will move from vague, inconsistent responses to controlled, validated outputs suitable for executive communication, operational analysis, and financial decision support.

The series progresses to using Claude as a structured analytical partner for data interpretation, variance analysis, and scenario modeling with a strong focus on accuracy and verification.

This series emphasizes practical application, structured thinking, and safe, effective use of Claude in business environments without requiring technical expertise.

Who Should Attend

- Finance and Accounting professionals
- Procurement and sourcing teams
- Business analysts supporting financial or operational functions

What You'll Learn

- Convert raw business and financial inputs into structured summaries and insights
- Apply structured prompting to drive consistent, audit-ready outputs
- Configure Claude Projects and custom instructions for repeatable financial workflows
- Enforce strict output formats for reporting, analysis, and communication
- Validate results using audit-style review and verification techniques
- Analyze trends, identify variances, and explore scenario impacts with confidence
- Produce polished, reusable deliverables using Artifacts

Outline

1. WORKSHOP #1: Claude Foundations

- First Interaction with Claude: Access, basic requests, default behavior observation
- LAB: Basic Summarization
- Improving Output with Structure: Clear direction and output formats
- LAB: Structured Summarization
- Common Business Use Cases: Executive summaries, operational issues, process docs, email

- LAB: Daily Executive Summary
- LAB: Operational Issue Breakdown
- LAB: Process to SOP
- LAB: Professional Email
- Recognizing Limitations: Uncertainty, confidence, human verification on numbers/claims
- LAB: Red flag example
- Safe Usage Practices: Non-sensitive/generalized inputs, avoiding confidential data
- Why Tailoring Claude Changes Everything: Configured behavior, role, format, and tone

2. WORKSHOP #2: Claude Configuration and Control

- Create a Claude Project with Output Contract: Instructions, baseline setup, project knowledge
- Structured Prompt Pattern: Task, Context, Format, Constraints, Validation criteria
- LAB: Rewrite a vague request using the structured pattern
- Build Reusable Templates: Report summary, email, risk analysis
- LAB: Run and adjust templates
- Force Output Structure: Tables, bullets, 'no extra text', and Artifacts
- LAB: Convert unstructured output into a defined format
- LAB: Generate output as an Artifact
- Critique and Validation Loop: Review process for compliance and gaps
- LAB: Review and refine generated output
- End-to-End Workflow: End-to-end deliverable generation

3. WORKSHOP #3: Analytical Foundations: Data, Guardrails & Verification

- The Skeptical Analyst: Math Guardrails & Persona configuration
- Data Ingestion: Anonymization, structure, and file understanding
- LAB: Upload a raw, messy BVA export and verify structure

4. WORKSHOP #4: Variance Analysis & Audit Loops

- Variance Analysis (The 201 Discipline Test): Strict prompting and numerical anomalies
- LAB: Analyze a 12-month spend trend
- The Audit Loop: Chain-of-Verification (CoVe) prompting
- LAB: Find errors on a balance sheet using a CoVe prompt

5. WORKSHOP #5: Scenario Modeling & Executive Synthesis

- Scenario Modeling & Stress Testing: Logic over arithmetic, red-teaming
- LAB: Model a 'Headcount Freeze' scenario
- Executive Synthesis & Final Toolkit: Turning data into CFO bullet points and Board Slides
- Deliverable: Finalizing the Finance Analyst Toolkit Project with three vetted templates

Prerequisites

- None