

How to get the most out of Claude for Finance & Accounting teams



Your GL is working while you sleep. Here's how to make Claude work the same way.

	WHAT IT IS	HOW FINANCE TEAMS USE IT	PROMPT EXAMPLE
Claude Chat	Your always-on finance analyst. Ask it anything. Draft anything.	Stress-test close memos, draft audit committee narratives. Always select Opus 4.6 + Extended Thinking for technical accounting.	"Here's our rev rec policy. Play devil's advocate as a skeptical Big 4 auditor and tell me where it fails."
Claude Projects	Saved workspaces. Upload your COA and policy docs once.	Create one project per entity. Upload your COA, rev rec memos, and board templates. No re-briefing.	"Using the COA and close checklist I uploaded, draft a day 3 close status update for the CFO."
Claude Skills	A standing brief. Tells Claude your close cadence and output standards.	Build a Skill for your close memo format or JE style. Claude follows it automatically. No reminders.	"Help me create a Skill for writing close status updates — concise, CFO-ready, no jargon."
Claude Cowork	Desktop app that reads your actual files. Word, PDF, Excel. No browser tab needed.	Point it at reconciliation files or bank statements. Creates real exception reports from what it reads.	"Read the reconciliation files in this folder. Flag every variance over \$10k and output an exception report."
Claude Connectors	Links to your tools. Slack, Google Drive, Notion, and 50+ others.	Claude can now search your Drive for work papers, pull Slack threads about open items, or reference your close tracker.	"Find our Q3 board deck in Drive and draft an updated revenue bridge slide with these Q4 actuals."
Claude Research	Deep reasoning mode. Searches web, cross-references, shows thinking.	Use when a cited answer matters. ASC updates, PCAOB guidance, peer company disclosures, benchmark close times.	"Research how public SaaS companies are disclosing AI-related costs in 10-Qs. Flag emerging patterns."
Claude Charts	Interactive visuals, built in chat. Live outputs you can edit and download.	Build waterfall charts, ARR bridges, close cycle timelines, variance dashboards. No Figma or Slides needed.	"Build a waterfall chart showing ARR movement Q3 to Q4: new logo, expansion, contraction, churn."
Claude Excel	AI inside your spreadsheet. Reads every tab, every formula, every cell.	Clean messy trial balance exports. Build flux analysis. Explains formulas in plain English for handoffs.	"Look at this trial balance export. Flag accounts with unusual movement vs. prior month. One sentence each."
Claude Plugins	Pre-built skill packs. Finance, compliance. Install one and Claude specializes.	Browse claude.com/plugins . Install accounting or compliance plugins. Type / to see what's available for your workflow.	"What plugins are available for revenue recognition or close management workflows?"
Claude Code	For the data-savvy controller. Reads your data files, writes scripts, runs analysis.	Hand it a GL export or Stripe CSV. It writes and runs the analysis — deferred rev rollforwards, auto-coding.	"Here's our Stripe CSV. Write a script to classify each line by rev type and output a deferred rev rollforward."

Advanced Hacks

01

Give Claude your close calendar.
Before any close task, tell Claude what day of close you're on, which entities are in scope, and what's still open. It will triage like a senior on your team.

02

Make Claude pressure-test your memos.
End any technical accounting prompt with: 'Now play a skeptical Big 4 auditor. What questions do you have?' Use before every audit committee submission.

03

Set up Global Instructions for your role.
Create a skill. Write your entity structure, ERP, close cycle, and reporting standards. Claude reads this before every conversation.