

# Claude found a \$1,600 loss.

## *Three months before it hit.*

Twelve months of a bakery's profit and loss, one Excel file, four questions. Claude found a \$411 monthly bleed and gave the owner three months of warning before it became \$1,600. Here is the add-in setup and the four questions, word for word, in the order I asked them. The bakery is a demo. The questions work on your sheet.

### First, put Claude inside Excel

You do this once. You need a paid Claude plan to sign in.

1. Open Excel and find **Add-ins** in the menu.
2. Click **More Add-ins** and type Claude in the search.
3. You are in Excel, so choose **Claude by Anthropic for Excel**, not Claude for Microsoft 365.
4. Press **Add**, then **Continue**, and sign in with your paid Claude account.
5. Click **Claude** in the Excel menu. The panel opens right next to your sheet.

### The four questions, in the order I asked them

#### 1 What moved

Two months side by side. On the bakery's sheet, Claude sent me to repairs and maintenance first.

##### PASTE INTO THE CLAUDE PANEL

Compare May 2026 and June 2026, list the three lines that moved the most, by how much, and tell me which one deserves my attention first.

**Make it yours:** *swap in your own two months. The last month you closed and the one before it.*

#### 2 The story

Six months back on the flagged line. For the bakery: a one-month spike, not a trend.

##### PASTE INTO THE CLAUDE PANEL

For the line you flagged first, look across the last six months and tell me the likely story: is this a one-month spike, a trend, or a seasonal pattern? Point to the months that support your answer.

**Keep in mind:** *the panel reads your business secondhand, from the sheet only. If the answer does not match what you remember, go with your memory, then find out why.*

### 3 The warning

A three-month projection and a one-word verdict. The bakery's verdict: squeezed. Three months of warning is enough time to change something.

#### PASTE INTO THE CLAUDE PANEL

Let's look ahead and do some projections. If this month's pattern holds for three more months, does the bakery end up ahead, flat, or squeezed?

**Make it yours:** swap the bakery for your business, and keep the three words: ahead, flat, or squeezed.

### 4 The accountant

Three questions for the next call, each tied to the line it came from. The bakery got one about capitalizing the June repair bill, and one about COGS creeping up as a share of revenue.

#### PASTE INTO THE CLAUDE PANEL

Based on this sheet, draft the three most useful questions I should bring to my accountant this quarter. Plain language, and tell me which line each question comes from so I can point at it on the call.

## What it does not do

- It does not replace your accountant.
- It does not file anything. Your taxes and payroll are still yours.
- It reads your business secondhand. When the answer clashes with what you remember, trust your memory and go find out why.

## Do this tonight

- ☐ Install the add-in and sign in.
- ☐ Open last month's sheet with the panel beside it.
- ☐ Ask the four questions, one at a time, in order.
- ☐ Save the three accountant questions for your next call.

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