

SERVICE CATALOGUE · 2026

Fixed-fee Claude services for *SMB finance.*

Powerful insights from your legacy finance systems — QuickBooks, Xero, Sage, NetSuite, and Excel — delivered with transparent pricing and a clearly defined scope of deliverables.

01

Transparent pricing

Fixed fees up front. No hourly surprises, no scope creep billed after.

02

Defined deliverables

Each package lists exactly what you receive and keep.

03

Fast turnaround

Most builds ship in days to a week.

— **START HERE · THE WEDGE**

Land with a *low-risk* first step.

A fast, near-zero-risk way to see what Claude can do with your numbers — and a prioritized roadmap of where the value is.

AUDIT · 1-2 DAYS

\$1,500–3,000

Finance AI Quick-Win Audit

FIXED FEE

We take read-only exports — trial balance, P&L, AP/AR aging, a few months of bank data — and produce a prioritized roadmap of 8–12 automation and insight opportunities specific to your systems, each tagged with effort and expected payoff.

WHAT YOU KEEP

- ✓ Prioritized opportunity roadmap (8–12 items)
- ✓ System-specific recommendations
- ✓ Effort vs. payoff scoring
- ✓ Short written report you own

— **BUILD PACKAGES**

Tangible deliverables, *delivered fast.*

Each build has a tightly defined scope and a tangible artifact you keep. Fixed fee, typically within a week.

BUILD · ~1 WEEK

\$3,500–7,500

Month-End Close Accelerator

FIXED FEE

Turn your P&L and balance sheet export into automated budget-vs-actual variance analysis plus board-ready management commentary that explains the "why" — collapsing the worst part of close from days to minutes.

WHAT YOU KEEP

- ✓ Automated variance analysis model
- ✓ Reusable close template
- ✓ Board-ready management commentary
- ✓ Handover walkthrough

BUILD · VALUE-PRICED

\$5,000+

Profit Leak Audit

OR PRICED VS. SAVINGS

A one-time deep dive into spend and margin: duplicate or near-duplicate payments, vendor consolidation, margin by product/customer/channel, pricing leakage, and subscription creep. Often self-funding — when the savings exceed the fee, the engagement pays for itself.

WHAT YOU KEEP

- ✓ Duplicate & near-duplicate payment findings
- ✓ Vendor & subscription consolidation list
- ✓ Margin analysis by product/customer/channel
- ✓ Quantified savings opportunities

BUILD · FIXED FEE

\$3,000–6,000

Document-to-Data Setup

FIXED FEE

A repeatable workflow that extracts structured data from invoices, vendor bills, and bank statements — killing manual data entry into AP/AR. A strong fit wherever your team is drowning in PDFs.

WHAT YOU KEEP

- ✓ Repeatable extraction workflow
- ✓ Template for new document types
- ✓ Structured output ready for AP/AR
- ✓ Team enablement on running it

BUILD · CONVERTS TO RETAINER

\$3,500–6,500

Management Reporting Pack

FIXED FEE

A board-ready monthly KPI dashboard built from your GL export — financials plus operational metrics, trends, and commentary in one clean pack. Designed to be refreshed monthly, which is why it converts naturally into the retainer.

WHAT YOU KEEP

- ✓ Board-ready monthly KPI dashboard
- ✓ Trend analysis & written commentary
- ✓ Financial + operational metrics
- ✓ Reusable monthly template

BUILD · PREREQUISITE

\$2,500–5,000

Chart of Accounts & Data Cleanup

FIXED FEE

Standardize a messy chart of accounts, re-map miscategorized transactions, and clean historical data. Less glamorous, but a common blocker that makes every other service work better — sometimes the prerequisite we deliver first.

WHAT YOU KEEP

- ✓ Standardized chart of accounts
- ✓ Cleaned historical data
- ✓ Re-mapped transaction history
- ✓ Mapping documentation

— RECURRING · THE RETAINER

Keep the insights *coming.*

Once your templates exist, ongoing delivery is fast and consistent — fractional FP&A without a full-time hire.

RETAINER · MONTHLY

\$1,500–4,000

Monthly Insights / Fractional FP&A

PER MONTH

Recurring close commentary, a refreshed dashboard and forecast, plus a block of ad hoc analysis each month — the rhythm of a finance team without the cost of a full-time FP&A hire.

EACH MONTH INCLUDES

- ✓ Monthly close commentary
- ✓ Refreshed dashboard & forecast
- ✓ Block of ad hoc analysis
- ✓ Standing review call

— UNDER THE HOOD

The right *Claude tool* for each job.

We're deliberate about which Claude product powers each deliverable — it's what keeps delivery fast and pricing fixed.

Claude for Excel

Our workhorse for models, variance analysis, and dashboards. (Beta — capabilities confirmed before quoting.)

Chat · files & data analysis

Audits, document extraction, and ad hoc analytical work directly on your exports.

The Claude API

Custom internal tooling and scaling document processing for larger clients.

Claude Cowork & Code

File- and task-level automation for staff, and heavier integrations when needed.

On data confidentiality: we agree where your numbers go before any work begins — delivering via Claude's consumer products or building on the API under commercial / zero-data-retention terms. Pricing ranges are indicative and confirmed in a fixed-fee proposal before work starts. Claude's beta products evolve quickly, so feature-dependent scope is verified against current documentation at quote time.

— GET STARTED

Not sure which package *fits*?

Most clients start with the Quick-Win Audit. Tell us your systems and what's painful about close, and we'll send a fixed-fee proposal with scope and deliverables spelled out.

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