



FREE LIVE WEBINAR

Beyond the quick answer.

How to get real work out of Claude and your business data with Tugger.

Wednesday 15 July · 11am BST · Live, with Q&A



SOUND FAMILIAR?

Your data's full of answers.

The hard part has always been getting at them, especially when they're spread across systems.

Your numbers are in your accounts. Your customers in your CRM. Your sales somewhere else again.

One straight answer means exporting from each one and stitching it together by hand.

HOW FAR THIS GOES

Four levels most people never reach.

- 01** **Ask** a quick question, answered from your data
- 02** **Investigate** follow-ups that pull two systems together
- 03** **Build** a board pack or a dashboard, made for you
- 04** **Systematise** reporting that runs itself on a schedule



HOW IT WORKS

The AI is the analyst. Tugger is the engine.

- 01 You ask** type a question, the way you'd ask a colleague
- 02 Tugger connects** Claude reaches into your data, securely
- 03 You get an answer** plain English, with the numbers. Then keep going



LIVE DEMO

Let's get into it.

Real data. Real conversations I've had with Claude. The questions you'd actually ask.



LIVE DEMO · 01

A conversation that crosses systems.

Profitability, then who's got open deals, then the email. One conversation, two systems.



LIVE DEMO · 02

A full board pack in minutes.

Numbers pulled, commentary written, a finished document. What used to take a day.



LIVE DEMO · 03

A dashboard you can interact with.

Built from one sentence. Filter it live, drill right in.



LIVE DEMO · 04

Set it up once. Let it run.

Projects, Skills, and reporting on a schedule. The Monday report, done for you.



LIVE DEMO · 05

The question you couldn't ask before.

Win the three biggest deals, what happens to revenue and cash? One question.



THE QUESTION I ALWAYS GET

Why not plug Claude straight into Xero?

Fair question. And it's the whole point of what we do.

- › **The whole picture** one system answers half a question. Tugger sees it all, joined up.
- › **Worked out first** Claude gets a small, clean answer, not thousands of raw rows.
- › **Real history** we keep what the sources don't, so trends are answerable.
- › **No guesswork** our semantic layer tells Claude how your data joins up.

Both give you an answer. **Only one's a number you'd take to the board.**

No knock on the built-in connectors. They're great at their job. This is a different one.



GET THE MOST OUT OF IT

Five habits.

- 01** **Be specific** timeframe, breakdown, format
- 02** **Keep going** it's a conversation, so follow up
- 03** **Ask for the deliverable** a document, a dashboard, an email
- 04** **Teach it your business once** in a Project
- 05** **Make it repeatable** save it as a Skill, put it on a schedule

TAKEAWAYS

Three things to take away.

- 01 Your data's full of answers** the hard part was always getting at them
- 02 Claude can't see your data alone** AI Insights is the connection
- 03 This goes beyond quick answers** real reports, real dashboards, on autopilot



GETTING STARTED

Want to try this with your own data?

New to Tugger? Book a demo and we'll show you with your own data. Already with us? Switch on AI Insights and start asking.

Start a free trial

Book a demo



Scan to start a free trial



Q & A

Your questions.

Fire away. And thanks for joining us.