Vol. 3 · Deep Dive edition

Claude for *the Company*



The step-by-step edition: admin steps, templates and exercises for rolling Claude out to a whole team.

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I've led the teams, and the rollouts

Hello, leaders.

Volumes 1 and 2 were about using Claude well yourself. This one is about getting a **whole team** using it well, safely, and without a surprise bill.

The goal: one setup, shared by everyone, that you can explain to your board, your auditors and your newest hire.

This is the deep dive: admin steps, templates and a task at every stop. Bring your admin.

How to read this edition

Same ten stops as the short version, with the "how" filled in. Four kinds of slide:

STEP BY STEP

Admin steps

Where to click in Organization settings.

TEMPLATE

Copy and adapt

Policy, kickoff agenda, reports.

WRONG / RIGHT

Side by side

Common leadership mistakes, and better moves.

TRY IT

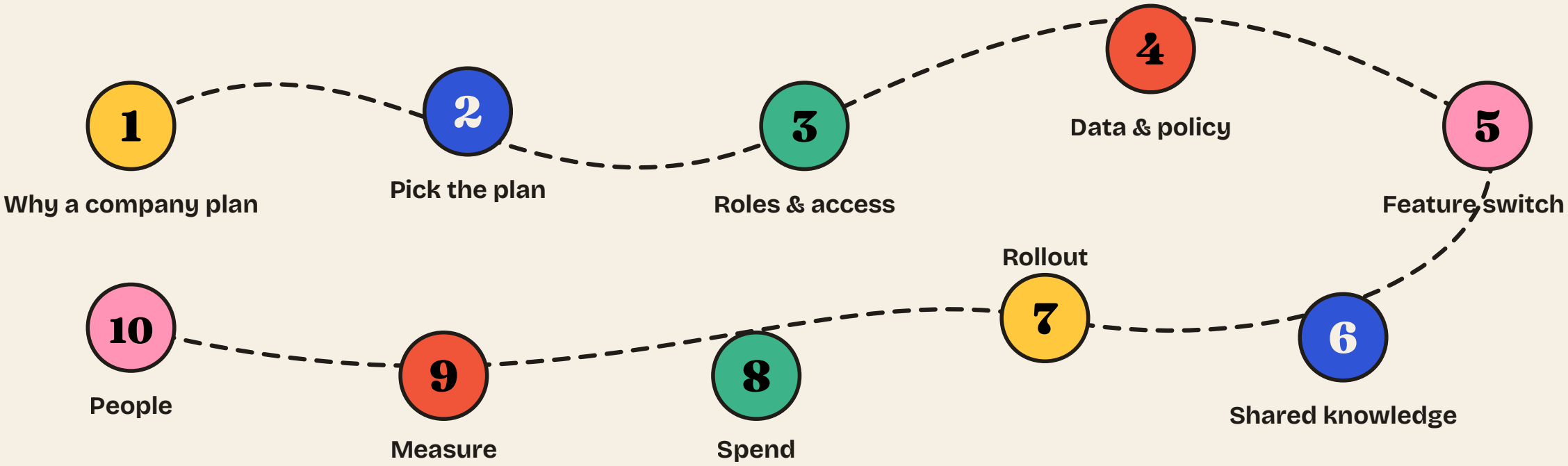
Your homework

One task per stop, with a "done when".

plans, prices and menus change. Check anything you'll sign against claude.com and the help centre.

The route

Ten stops. 1–5 are setup; 6–10 are what makes it stick.



Your first admin hour

Do these before you invite anyone. It's much easier to start right than to fix it later.

everything lives under Organization settings

1. **Name a second Owner**, so you're not a single point of failure.
2. **Set allowed email domains**, so only company addresses can join.
3. **Set the switchboard** (stop 5): what's on, what's limited, what waits.
4. **Set an organisation spend limit** under Usage, even a generous one.
5. **Publish the one-page policy** (stop 4) where people will see it.

1

at a lending platform...

Compliance didn't ask "is it smart?" They asked "where does our data go, and who can see it?"

Twenty personal accounts can't answer that question. One company workspace can.

Why a company plan

Personal accounts vs one workspace

× 20 PERSONAL ACCOUNTS

- Company data scattered across private chats
- No way to remove access when someone leaves
- Everyone reinvents the same prompts
- Twenty receipts, no overview of spend

✓ ONE TEAM OR ENTERPRISE WORKSPACE

- Your work data isn't used to train models by default
- Admins add and remove people in one place
- Shared projects, skills and connectors
- One bill, spend limits, usage analytics

Ban it, ignore it, or govern it?

× BAN IT OR IGNORE IT

People use AI anyway, on personal accounts, with company data, and nobody knows. You get all of the risk and none of the learning.

✓ GOVERN IT

Give people a company workspace that's better than their personal one, with clear rules. Risky use moves somewhere you can see, and good use spreads.

the safest AI is the one you've chosen, set up, and can see

Find out what's already happening

Ask without judgement. You'll get honest answers only if nobody gets in trouble.

Try it

1. Send a three-question anonymous survey: which AI tools do you use, for what, and with what data?
2. List the top five uses. Those are your pilot's first targets.
3. List any risky data use. Those go in your policy.

Done when: you know who's already using AI, for what, and what worries you.

2

Team or Enterprise?

Enterprise includes everything in Team, plus the controls regulated companies need.

TEAM

Small & growing

From 2 people. Standard and Premium seats (Premium = much more usage). Admin console, shared projects, connectors, skills.

ENTERPRISE

Regulated & scaling

From 20 seats (self-serve). SSO, SCIM, audit logs, custom data retention, custom roles, Compliance API.

Pick the plan

Team Standard seats: $20 per member per month billed annually ($25 monthly). On Enterprise, seats cover access and usage is billed separately at API rates. Check claude.com/pricing for current numbers.

A simple rule

If any of these are true, talk to Enterprise. Otherwise, start on Team. You can upgrade later and keep your chats, projects and members.

- ☐ Auditors or regulators ask for activity logs
- ☐ IT requires single sign-on (SSO)
- ☐ People join and leave through HR systems
- ☐ You need a custom data retention period
- ☐ Different departments need different features

Side by side

	Team	Enterprise
Minimum size	2 members	20 seats (self-serve)
Shared projects, skills, connectors	✓	✓
Spend limits & usage credits	✓	✓
SSO, SCIM, domain capture	–	✓
Audit logs, Compliance API	–	✓
Custom data retention	–	✓
Custom roles, groups, group budgets	–	✓

Starting on Team

You can move to Enterprise later and keep members, roles, chats and projects.

1. **Count people, not enthusiasm.** Seats for the pilot plus the first wave.
2. **Mix seat types.** Standard for most people; Premium (much more usage) for your heaviest users.
3. **Bill annually** once the pilot proves out. It's cheaper per seat.
4. **Review seat types monthly.** Admins can reassign them in Organization settings › Members.

Write the one-paragraph case

The paragraph you'd send your CFO or co-founder.

Try it

1. Pick Team or Enterprise with the five-question checklist.
2. Estimate seats: pilot plus first wave. Mark the likely Premium users.
3. Name three tasks you expect to get faster, and how you'll measure them.
4. Ask Claude to tighten it to one paragraph. Then check every number.

Done when: someone with the budget says yes to a pilot.

3

Four roles. Know who holds the keys.

USER	ADMIN	OWNER	PRIMARY OWNER
Uses Claude. Most of your people.	Adds and removes members.	Billing, SSO, data settings, audit logs.	Just one. Exports, ownership transfers.

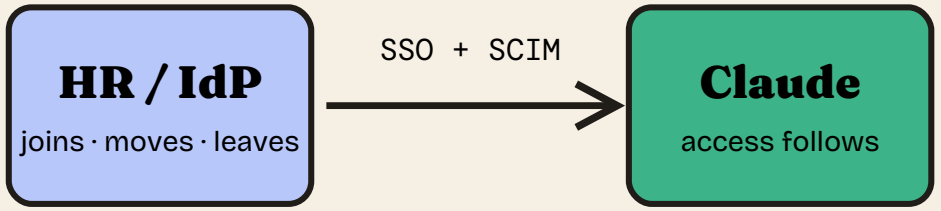
Roles & access

On Enterprise, **custom roles** and **groups** let you give, say, Finance different features from Engineering.

Joining and leaving

On Team, admins invite people (invite links are on by default). On Enterprise with SCIM, your identity provider does it, so someone who leaves the company loses access automatically.

Make "remove from Claude" part of your offboarding checklist, either way.



no orphan accounts

Adding people the right way

Admins and above can do this. Only Owners see Billing.

a pending invite already takes a seat

1. **Organization settings › Members › Add member.**
2. **Use their work email**, on one of your allowed domains.
3. **Pick role and seat**: User and Standard for most people.
4. **Leaving?** Same page › menu › Remove from team. They lose access immediately.

Roles by group, not by person

With 200 people, managing access one by one breaks. Groups don't.

1. **Create custom roles** in Organization settings › Roles, e.g. "Finance: no browser, no outside sharing".
2. **Create groups** in Organization settings › Groups, or sync them from your identity provider.
3. **Give each group a role.**
4. **Add people to groups.** Their access follows automatically.

Draw your access map

One page, before you invite anyone beyond the pilot.

Try it

1. List your Owners (at least two) and Admins.
2. Group people by what they should be able to do.
3. Add "remove from Claude" to your offboarding checklist.
4. Ask HR or IT who triggers it when someone leaves.

Done when: you can say who has access, why, and who removes it.

4

from lending and KYC work...

We wrote one page: what never goes into any AI tool. Customer ID numbers. Unredacted bank statements.

A one-page policy people actually read beats a 30-page one nobody opens.

Data & policy

A one-page AI policy

✓ ENCOURAGED

Drafting, research, analysis, summaries, docs, decks, code, all inside the company workspace.

⚠ WITH CARE

Customer data: only what's needed, in projects with the right access. Always check before it goes out.

× NEVER

Passwords and keys, ID and card numbers, anything a contract says can't leave your systems.

Plus one line everyone remembers: "AI-assisted is fine. Unchecked is not."

A policy page you can copy

Adapt it with your legal or compliance lead. Keep it to one page.

put it at the top of every shared project, too

ai-policy.md

```
# How we use AI at [Company]
Use the company Claude workspace only.
Not personal accounts, not other tools.

## Go ahead
Drafts, research, analysis, summaries, docs,
decks and code inside the workspace.

## Take care
Customer data: the minimum needed, in the
right project. You check everything that
goes out, and you own it.

## Never
Passwords, keys, ID/card/bank numbers, or
data a contract says can't leave our systems.

Questions? Ask [name]. Unsure? Don't.
```

The controls behind the policy

ALL WORK PLANS

No training

Your work data isn't used to train models by default.

OWNERS

Feedback settings

Decide whether people can send chats as feedback.

ENTERPRISE

Retention

Set how long conversations are kept.

ENTERPRISE

Logs & API

Audit logs, plus the Compliance API for your own tools.

Regulated sector? Enterprise also offers a HIPAA-ready setup and holds SOC 2, ISO 27001 and similar certifications. Ask for the details in writing.

Ship the policy this week

Good enough and published beats perfect and still in draft.

Try it

1. Copy the template. Fill in the brackets.
2. Add one line per contract or regulation that applies to you.
3. Have legal or compliance read it in one sitting.
4. Publish it, and pin it in your team channel.

Done when: any employee can tell you the "never" list from memory.

5

Start conservative. Open up on purpose.

Owners decide which features your people get, in Organization settings. Turn on what your policy allows, watch for a month, then widen.

Feature switches

The switchboard

A sensible starting position for most companies. Adjust to your policy.

● ON FROM DAY ONE

Web search · file creation · projects · Docs & Slides · Research

◐ ON, WITH LIMITS

Connectors (read and draft, not send or delete) · skills · memory

○ PILOT GROUP FIRST

Claude in Chrome · scheduled tasks · outside sharing of artifacts

engineers on Claude Code? Managed settings let IT set rules no one can override (see Volume 1).

Setting the switches

write down what you turned on, and why. Future you will thank you.

1. **Capabilities:** web search and file creation on, for everyone.
2. **Connectors:** add the company's tools; allow read and draft, block send and delete to start.
3. **Skills:** turn on, and provision your first company skills.
4. **Artifacts:** keep sharing inside the company; allow outside links later, on purpose.
5. **Memory, Chrome, scheduled tasks:** pilot group first, then decide.

Two ways to turn things on

× EVERYTHING, DAY ONE

Every connector, every action allowed, outside sharing on. The first mistake becomes a company-wide incident, and then everything gets switched off in a panic.

✓ STAGED

Safe basics for everyone. Powerful features for the pilot group. A short review each month: what helped, what scared us, what to widen.

Write your switchboard

A one-page table you can show your board or your auditor.

Try it

1. List every feature in three columns: on, on with limits, pilot only.
2. For each "with limits", write the limit.
3. Set it in Organization settings.
4. Put a review date one month out.

Done when: the settings match the page, and someone owns the review.

6

the best return I've seen...

Our proposal and audit skills live in one shared library.

A new hire's first proposal follows the same structure as our best ones, on day one. The knowledge stopped living in two people's heads.

Shared knowledge

Three things worth sharing

PROJECTS

Team rooms

One per client, product or function. Share as "can view" or "can edit".

SKILLS

House ways

Owners can provision skills for the whole company, or share them with groups.

CONNECTORS

One door each

Owners add the company's tools once. People sign in with their own permissions.

Give each shared skill and project an **owner**, someone who keeps it current. Unowned knowledge goes stale quietly.

Give a skill to everyone

Owner-provisioned skills appear for all users automatically. No one needs to install anything.

1. **Start with a champion's skill** that's already proven itself (see Volume 2).
2. **Review it:** no secrets, no links to unknown sites, a clear description.
3. **Upload it** in Organization settings › Skills.
4. **Announce it** with a one-line example of when to use it.

A starter library, team by team

SALES

Proposal · follow-up · objection replies

MARKETING

Brand voice · campaign brief · SEO audit

OPERATIONS

Meeting notes · SOP writer · vendor compare

HR

Job description · interview kit · policy Q&A

FINANCE

Monthly report · variance notes · invoice check

ENGINEERING

Code review · release notes · incident write-up

Ship the first three

Three good shared skills beat thirty half-finished ones.

Try it

1. Ask your pilot: which prompt do you reuse most?
2. Turn the top three into skills, each with a named owner.
3. Provision them company-wide.
4. Check in a month: who's using them, and what needs fixing?

Done when: people use the skill without being reminded it exists.

7

what worked for us...

Five keen people for a month beat fifty reluctant ones for a week.

The pilot group found the real use cases, wrote the first skills, and became the people everyone else asked.

Rollout

A 90-day rollout

WEEK 0

Set up

Plan, roles, policy page, switches.

WEEKS 1-4

Pilot

5–10 champions from different teams.

WEEKS 5-8

First wave

One department at a time, with its champion.

WEEKS 9-12

Everyone

Skills library, office hours, review.

each stage ends with a short review: what's working, what to switch on next

Choosing your champions

Not the most technical people. The most respected ones, in each team.

✓ LOOK FOR

Curious · patient · trusted by their team · does real day-to-day work

✓ MIX

One per department. Junior and senior. At least one sceptic.

✓ GIVE THEM

Time (2–3 hours a week), early access, and a direct line to you

a convinced sceptic is worth five enthusiasts

A 60-minute kickoff

Short, practical, and mostly hands-on. No slides about "the future of AI".

record it for the people who couldn't come

0-10 · WHY

Why we're doing this, and the policy page.

10-25 · WATCH

A champion does a real task live.

25-50 · DO

Everyone does one real task of their own.

50-60 · NEXT

Office hours, the skills, where to ask for help.

Launch the pilot

Four weeks, five to ten people, one clear question: where does this save real time?

Try it

1. Name your champions, one per team, including a sceptic.
2. Run the kickoff.
3. Weekly 20-minute check-in: wins, blockers, risky moments.
4. Week 4: decide what to widen, and what to fix first.

Done when: you have three proven use cases and three people who can teach them.

8

the analytics surprise...

Two people made most of our spend. Both were worth every rupee.

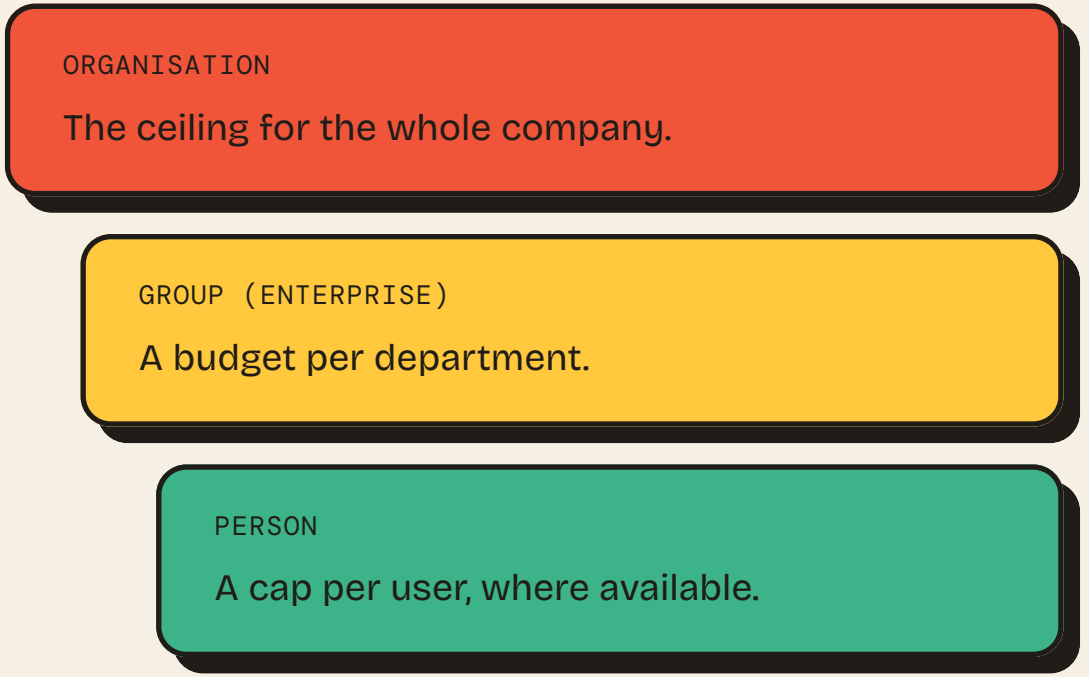
The fix wasn't to cap them. It was to give them the right seat, and help everyone else reach their level.

Spend

Three levels of limits

Set them in **Organization settings › Usage**. Limits stop surprises without stopping work.

Team: owners can pre-buy usage credits for people who hit their seat's limit. Enterprise: usage is billed at API rates, so limits matter even more.



Set limits, then look monthly

Owners (and Enterprise roles with billing rights) can do this.

hit a limit? usage pauses until next month, or until it's raised

1. **Organization settings › Usage.** Set the organisation limit first.
2. **Enterprise:** add group budgets per department.
3. **Per-person limits** where available, for extra usage.
4. **Monthly:** open Analytics and look at spend concentration. Who uses most, and is it worth it?

Controlling cost

× CAP EVERYONE LOW

Your best users hit the wall mid-task and go back to the old way, or to personal accounts. You save a little money, and lose the reason you bought it.

✓ SHAPE THE SPEND

A generous company ceiling. The right seat for heavy users. Budgets by team. A monthly look at who spends what, and what they got for it.

the question isn't "how much?" but "how much, for what?"

Your first monthly spend review

Thirty minutes, with whoever owns the budget.

Try it

1. Open Analytics. Note total spend and the top five users.
2. Ask each of the top five: what did you get done with it?
3. Adjust seats: Premium for heavy users, Standard for light ones.
4. Adjust limits. Book next month's review.

Done when: you can explain the bill in one sentence.

9

Count outcomes, not messages.

"10,000 chats this month" tells your board nothing. "Proposals now take one day instead of three" tells them everything.

Measure

Five numbers worth tracking

ADOPTION

Weekly active people, by team

DEPTH

Using projects, skills and connectors, not just chat

SPEED

Time for 3 key tasks, before vs after

QUALITY

Rework and errors that reach clients

FEELING

A two-question survey each month

The admin **Analytics** dashboard covers adoption and spend, and can run surveys. Speed and quality you measure yourself: pick three tasks and time them.

Time three tasks, before and after

Simple, honest, and convincing. Pick tasks people do every week.

measure quality too, not just speed

Task	Before	After
Client proposal	__ hrs	__ hrs
Monthly report	__ hrs	__ hrs
Support reply	__ min	__ min
Errors reaching clients	__	__

A one-page quarterly report

For your board or leadership team. Claude can draft it from Analytics exports and your notes.

quarterly-ai-report

1. Adoption
   active people, by team, trend

2. Outcomes
   the 3 timed tasks, before vs after
   one story worth retelling

3. Spend
   total, per active person, vs budget

4. Risk
   incidents, near-misses, policy changes

5. Next quarter
   what we'll switch on, what we'll fix

Get your baseline now

You can only show "after" if you measured "before".

Try it

1. Pick three weekly tasks with your champions.
2. Time them the old way, this week.
3. Time them again at the end of the pilot.
4. Put both numbers in the quarterly report.

Done when: you have a before-and-after number you'd defend.

10

the quiet question...

"Is this going to replace me?"

Someone on your team is thinking it, even if nobody says it. Answer it out loud, early and honestly, or the rollout stalls in silence.

People

What good leaders do

GO FIRST

Use it in public

Share your own prompts, drafts and mistakes in the team channel.

TEACH

Hold office hours

30 minutes a week. Real work, real questions.

CELEBRATE

Share the wins

"Saved a day on the tender" beats any training deck.

BE CLEAR

Say what changes

Tasks change, people grow. Say it plainly.

Honest answers to the quiet questions

"WILL IT REPLACE ME?"

Tell them what you actually plan. If tasks change, say which, and how you'll help people grow into new ones.

"IS IT CHEATING?"

No. AI-assisted work is welcome here. Unchecked work isn't, whoever wrote it.

"WHAT IF I GET IT WRONG?"

Ask early, share mistakes, and we'll fix the policy, not blame the person.

A training path that works

Short, repeated and hands-on beats one long workshop.

the other Field Manuals are free to hand out

1. **Week 1:** the kickoff, plus Claude at Work (Volume 2) for everyone.
2. **Weeks 2–4:** 30-minute office hours, weekly. Real tasks only.
3. **Engineers:** The Claude Code Field Manual (Volume 1), plus a shared `.claude/` setup.
4. **Monthly:** a "show and tell" where one team demos a win.

Go first, in public

People copy what leaders do, not what leaders say.

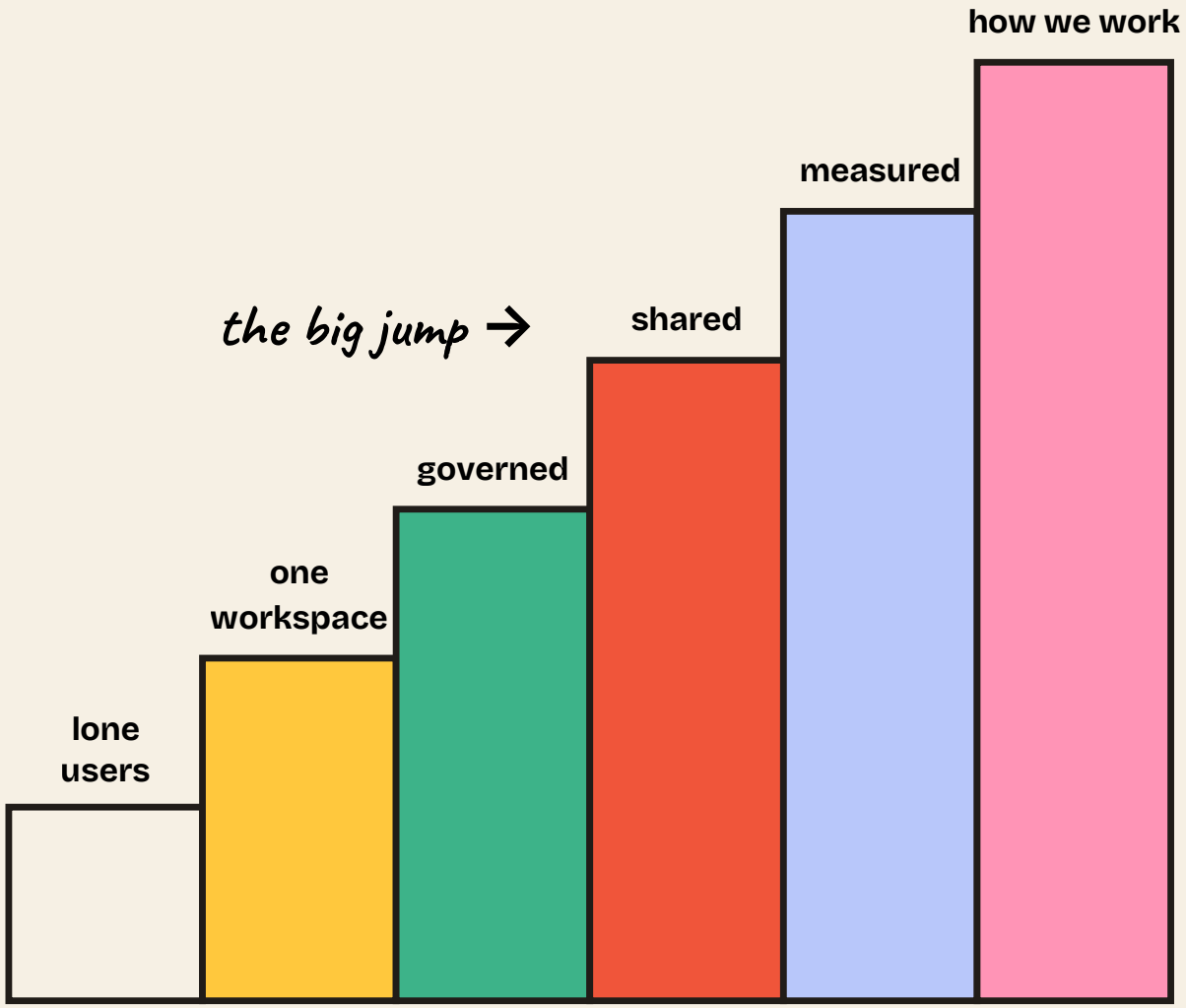
Try it

1. This week, use Claude for one real leadership task: a plan, a memo, a board update.
2. Share how you did it in the team channel, including what you fixed by hand.
3. Answer the "replace me" question out loud at your next all-hands.

Done when: someone replies "can you show me how?"

Where is your company?

Most companies are on step one or two: a few enthusiasts, no shared setup. The jump that matters is shared, when one person's good workflow becomes everyone's.



The leader's checklist

SET UP

- ☐ Team or Enterprise
- ☐ Roles assigned
- ☐ Offboarding step
- ☐ One-page policy
- ☐ Switchboard set

SHARE

- ☐ First 3 skills
- ☐ Team projects
- ☐ Company connectors
- ☐ Owner for each
- ☐ Champions named

CONTROL

- ☐ Org spend limit
- ☐ Group budgets
- ☐ Monthly spend look
- ☐ Right seats
- ☐ Pilot before widening

LEAD

- ☐ Use it in public
- ☐ Office hours
- ☐ Share wins
- ☐ 3 tasks timed
- ☐ Quarterly review

Now go lead it.

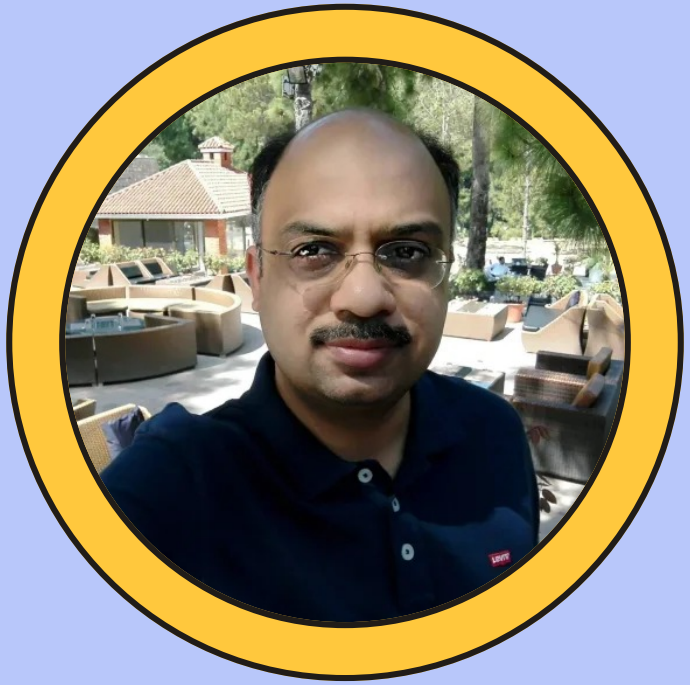
Pick your five champions this week, and do the first "try it" together.

Mian Shafiq is a technology leader, software engineer and AI practitioner with over 25 years of building software, products and teams across recruitment, fintech and SaaS.

The Field Manuals: **The Claude Code Field Manual** · **Claude at Work** · **Claude for the Company** · **Building on Claude** (next)

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shafiq.pk



yes, a real human reads every message

Questions? Rolling it out? *Say hi.*

Tell me what's working in your company, what isn't, and what Volume 4 should cover.

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