Vol. 3 · for founders & team leaders

Claude for *the Company*



A practical guide to rolling Claude out to a team: the right plan, safe settings, shared skills, sensible spending, and people who actually use it.

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I've led the teams, and the rollouts

Hello, leaders.

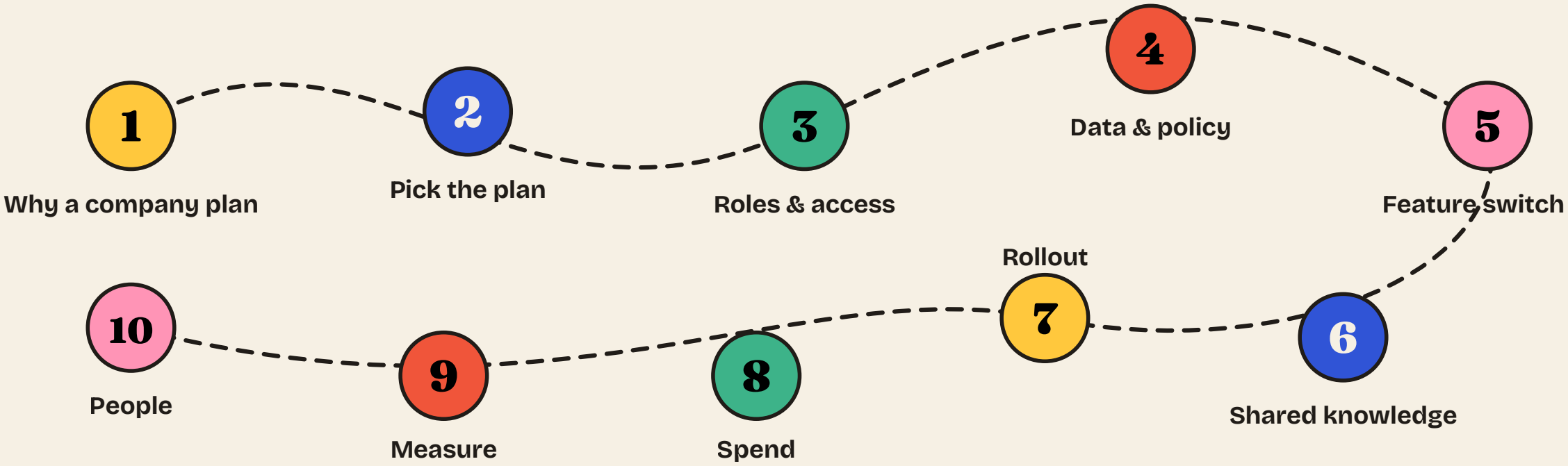
Volumes 1 and 2 were about using Claude well yourself. This one is about getting a **whole team** using it well, safely, and without a surprise bill.

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

One idea per slide. About 20 minutes. Bring your admin.

The route

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



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

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

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.

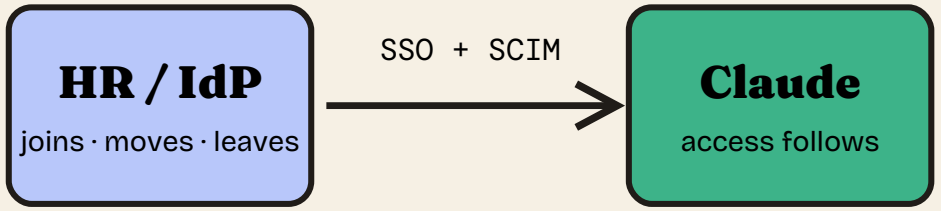
Roles & access

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

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."

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).

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.

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

8

the analytics surprise...

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

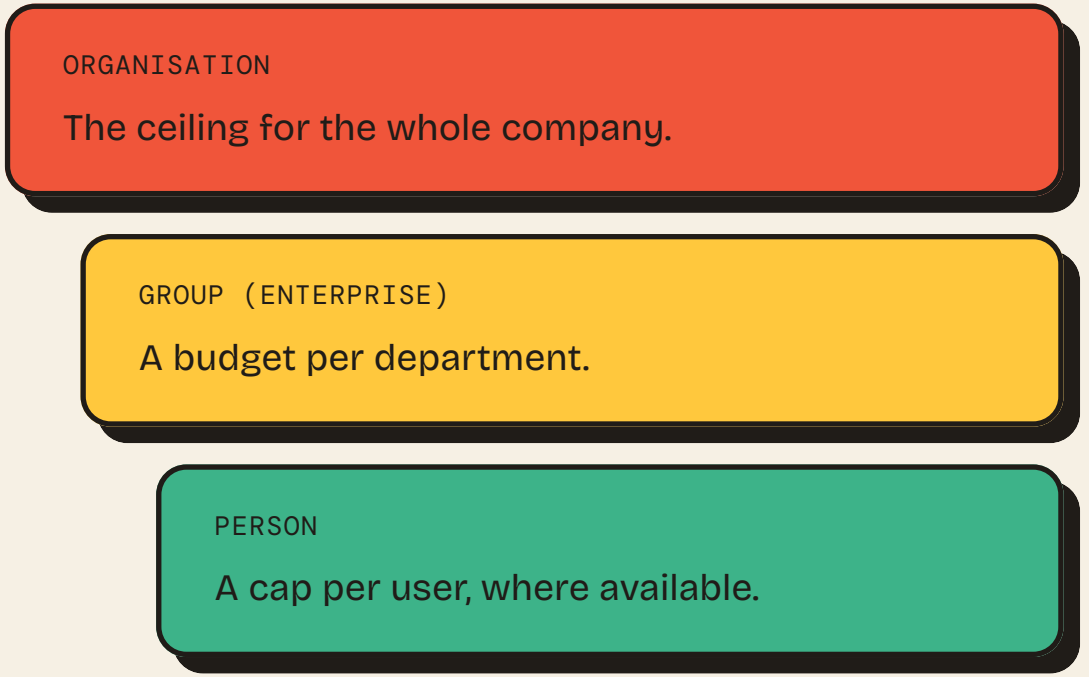
The fix wasn't to cap them. It was to give them the right seat, and help everyone else reach their level.

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.



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.

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.

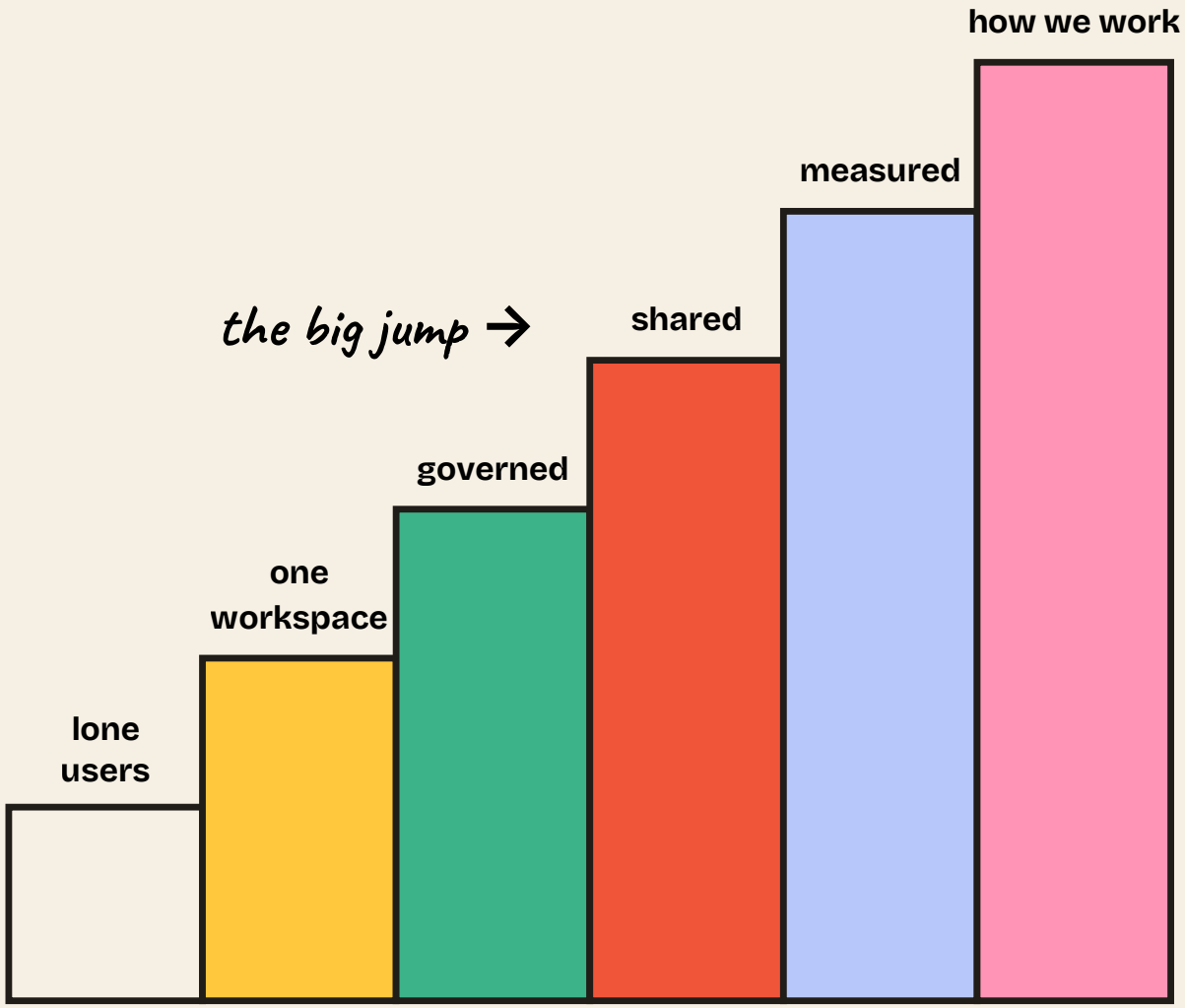
BE CLEAR

Say what changes

Tasks change, people grow. Say it plainly.

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.

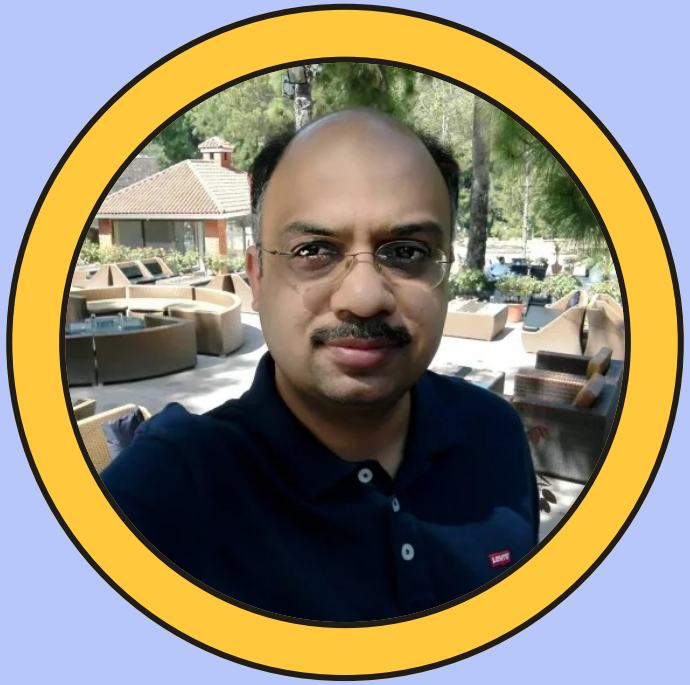
Pick your five champions this week. Everything else follows from them.

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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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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