Deploying Claude Enterprise with Confidence: Work-along companion

Filled out, this document is your rollout plan: your objective, an owner for every decision, and your answer to each of the five decisions. It has one section per lesson. Some sections you fill out in their entirety; others set you up to brief the stakeholder who owns the decision, so that it comes back to you settled and you can put the setting in place.

Pluto is the course's fictional example company. Where a cell's shape is hard to picture, Pluto's entry appears in italics as a model of the shape, not the content.

Each section is built from the same parts, in this order. Not every section uses all of them:

1. **Notes:** room to think it through in your own words before you commit an answer (Lesson 1).
2. **Paste from the interactive:** where a lesson's interactive hands back an output (Lessons 2 to 4), paste it into the box. The table underneath asks for the same thing, so you can fill it in by hand instead.
3. **What to decide / Your answer:** the shaded tables where you record what you decided and, where the table asks, why.
4. **Hard to undo:** a shaded box carrying what it would cost to reverse a setting. Confirm it before go-live.
5. **Hand off to:** where the decision isn't yours alone, this names its owner and the brief you bring them: the tables above, what you need back, and by when. Came back as is where you record their answer.
6. **Open items:** anything you can't close yet, who you need it from, and when you need it by. Lesson 13 gathers them.

Outside the tables, three labels tell you what each paragraph is for: **Fill in** says what to enter in the table below it; **Context** is background to read before you fill it in; **Keep in mind** is a point about the table above it.

The plan

Lesson 1 · Five decisions and the frame

Fill in: Define your rollout objective. Aim for one sentence that names what success looks like (the company-wide ambition you're after) and the constraint that must hold on the way there. Every later decision is weighed against it. Think it through in the Notes box, then write your objective in the table below.

Notes

Success looks like (the ambition you're after):

The constraint that must hold on the way there:

What to decide	Your answer
Pluto's objective, as a model	*Every one of Pluto's five business units uses Claude in its daily work by the end of the quarter, measured as weekly active usage in each unit, without a single security escalation from Payments & Trust.*
Your rollout objective	

Lesson 2 · Owners and intake

Fill in: Complete the Lesson 2 interactive, then paste its output over the box below. It hands back the decisions that need extra attention at your company, plus a priority card.

Paste from the Lesson 2 interactive here ↓

Fill in: Enter the five decision owners for your company: who owns each decision and why they're the right owner. In the last column, mark the decisions the card flagged for extra attention.

Decision	Decision owner (name)	Why they're the owner	Extra attention needed?
Structure & Identity			◯ Yes ◯ No
Access			◯ Yes ◯ No
Governance			◯ Yes ◯ No
Spend			◯ Yes ◯ No
Visibility			◯ Yes ◯ No

Open items: anything in this section you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Lesson 3 · Prerequisites

Fill in: Complete the Lesson 3 interactive, then paste its output over the box below.

Paste from the Lesson 3 interactive here ↓

Fill in: For each prerequisite, mark its status and name who at your company owns getting it done. Four are must-dos: three hard blocks on group setup, plus the lockout insurance. Any must-do not in place, and any prerequisite with no owner, is what you resolve before Lesson 4.

Prerequisite	Status	Who owns getting it done
Lockout insurance in place (must-do): at least two members hold the Owner role directly, not through a group; with IdP role mappings, they are in the group mapped to Owner before you save it	◯ In place ◯ In progress ◯ Not started	
Identity provider (IdP) connection configured (hard block)	◯ In place ◯ In progress ◯ Not started	
Provisioning app set up in your IdP (hard block)	◯ In place ◯ In progress ◯ Not started	
Domain verified and claiming on (hard block; irreversible once initiated)	◯ In place ◯ In progress ◯ Not started	
Group naming convention agreed	◯ In place ◯ In progress ◯ Not started	
Billing owner identified	◯ In place ◯ In progress ◯ Not started	

Hard to undo: domain claiming can't be reversed once it's on. Before you initiate it, forewarn the members already using Claude on personal accounts, and record your specifics here:

- [ ] When the claim starts, and the 30-day window members have to act
- [ ] The choice they make (bring their conversations and projects, or start fresh). Before they choose, they should know: custom skills don't transfer in a personal-account migration, so members should export any they want to keep first, and connected-app authorizations are revoked, so each app is reconnected from the new organization account; a whole-organization Team-to-Enterprise migration retains members' skills instead
- [ ] Who they should ask if something looks wrong
- [ ] What happens when the window closes (the personal account is deactivated)
- [ ] Who sends the note, and when

Decision: Structure & Identity

Lesson 4 · One organization or many

Fill in: Complete the Lesson 4 interactive, then paste its output over the box below: its recommendation, one organization or several. Then decide below.

Paste from the Lesson 4 interactive here ↓

Fill in: Answer the three inputs below and record where you landed.

What to decide	Your answer
Separate contracts with Anthropic?	
Distinct IdPs that can’t be joined into one shared sign-in?	
Part of the company that must be kept separate from another part’s data, by regulation or contract?	

What to decide	Your answer
Where you landed: one organization or many, and, if many, where the boundary between them falls (hard to undo)	
How members arrive: JIT, or directory sync (SCIM)	

Hard to undo: once the topology (how many organizations you run, and where the boundary between them falls) is set, splitting or merging organizations later is a rebuild and re-provisioning, not a setting change. Confirm it before go-live.

Hand off to: *counsel, the data-residency owner, or your identity team (whoever runs your IdP)*

Only hand this one off if the decision isn't yours alone. Brief them so you can set up the organization or organizations and move on to groups: bring the table above, and ask for a yes or for the specific separation they require, not a general opinion on structure.

What you bring them	Your answer
The table above: the three inputs and where you landed, and why	

What you need back: a yes to the topology as proposed, or the specific separation they require.

Decide by:

Came back as:

Lesson 5 · Your groups

Fill in: Sketch your groups against the union rule you saw: a member’s access is the union of every group they’re in, and the union never subtracts.

What to decide	Your answer
Which pattern your groups follow: mirror your org chart, tier by risk, or hybrid (department groups plus a dedicated group where a risk boundary sits), and why	

Fill in: List the groups that pattern produces. In the second column, name the population each group covers (a team, a function, a regulated group) rather than individual people: if your groups sync from your IdP, membership follows the directory; if you create them by hand, write the membership rule instead. Leave the last column until Lessons 6 and 7, where you decide what each role grants:

Group	Who it covers	What its role grants

Keep in mind: These grants take effect only for members whose role is Custom; members on the built-in User, Admin, or Owner roles keep every surface, model, and connector enabled organization-wide. Setting the role to Custom, by hand or through your IdP role mapping, is part of the Lesson 5 hand-off.

What to decide	Your answer
Any function that must be tightly bounded, and the dedicated group that bounds it (a narrow role stacked on a broad group won't do it)	

Hard to undo: provisioning runs on the group-to-IdP mappings, so changing them later moves people's access (existing members need a manual resync after a mapping change). Confirm them before go-live.

Hand off to: *your identity team (whoever runs your IdP)*

Brief them so the groups you designed exist in the IdP and provision correctly; if that person is you, treat this as your own checklist. Bring the tables above and the rule below, and ask them to confirm it can be provisioned as written.

What you bring them	Your answer
The rule that turns your IdP groups into Claude groups, plus any exception (hard to undo) *Pluto's rule, as a model: one Claude group per IdP business-unit group* and the cross-unit Engineering group, *plus a payments-eng group whose members come out of the broad Engineering group.*	
Any group whose role differs from your standard custom role	
Which IdP group maps to the Custom role, so group roles actually apply	

What you need back: confirmation the mapping rule can be provisioned as written, and any mapping that has to be an exception.

Decide by:

Came back as:

Open items: anything in this module you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Decision: Access

Lesson 6 · Surfaces each group gets

Fill in: For each group, mark day-one surfaces and the ones you'll phase in later. The full list of surfaces and feature toggles a role can grant lives at Organization settings > Roles. If the list of groups would run long, name the rule that decides which groups get a specialized surface instead.

Group	Surfaces on day one	Surfaces phased in later, and why

Hand off to: *your platform lead (and a heads-up to the budget owner)*

Brief them so you can switch on the day-one surfaces for each group. The platform lead needs to know, for each group getting Claude Code, what it can reach: which repositories, files, commands, and network destinations. If you're setting per-role default models, give the budget owner a heads-up: that is where the spend settings in Lesson 10 begin, and you record them there.

What you bring them	Your answer
The Claude Code groups, and what each group's code touches	
Any per-role default models you're setting (a heads-up for the budget owner; you record them in Lesson 10)	

What you need back: confirmation from the platform lead that Claude Code's boundary configuration is ready for each group getting it. The budget owner needs no answer yet.

Decide by:

Came back as:

Lesson 7 · Connectors

Fill in: List the connectors you'll add to your organization (Organization settings > Connectors > Browse connectors > Add to your team), the groups that get each one, and its depth. If the list would run long, name the rule that decides who gets it instead.

Connector	Who gets it	Depth
		○ Read-only ○ Read-write
		○ Read-only ○ Read-write
		○ Read-only ○ Read-write
		○ Read-only ○ Read-write

Keep in mind: Claude Code's network reach is its own list: the domains it may call, which your platform lead sets in Claude Code's managed settings (the sandbox's allowedDomains). Raise it in the same conversation as this list (Lesson 6 hand-off).

Hand off to: *risk owner, for any row with write access*

Brief them so you can open write access on the rows that need it. Lead with the workflow the write access serves and the group that carries it, because a bare connector list gives them nothing to approve, and ask for a decision on each row.

Connector with write access	The workflow it serves	The group that carries it	What write access lets Claude change, acting as the member

What you need back: an approve or decline on each row with write access, and for each approved row whether its write tools run on Needs approval or Always allow.

Decide by:

Came back as:

Open items: anything in this module you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Decision: Governance

Lesson 8 · Governing customizations

Context: Fit the posture to how you already work.

What to decide	Your answer
Your posture	○ **Open build, reviewed spread** ○ Centralized ○ Fully open Rationale:
Any group that runs a different posture, and what the split is (for example: most groups build freely and share within the group, with a named reviewer for anything beyond it; a regulated group shares nothing until approved)	

What to decide	Your answer
Who reviews customizations before they spread organization-wide (if your posture has a reviewer), and for which groups	
Whether code execution stays on, and for whom	

Context: Three kinds of customization sit under this decision: skills (and the plugins that bundle them), projects, and organization instructions. Skills and projects spread according to the posture you set above. Organization instructions you set yourself, organization-wide (Organization settings > Organization and access): the always-on guidance every conversation carries.

Fill in: Draft the two or three lines every conversation should carry; Lesson 10 adds three cost lines, and you record them here too.

What to decide	Your answer
The lines Claude should always know about your company (industry, how you describe yourselves, anything it should never assume)	
The standards Claude should always follow (tone, formats, review steps, anything off-limits), plus the three cost lines from Lesson 10	

Hand off to: *the governance owner you named in Lesson 2, and your security lead if the posture isn’t yours alone to set*

Brief them so you can set the posture once and leave it set. Bring the tables above, give them enough to say yes at the posture level rather than a review that reopens with every new customization, and ask for any group they need held to a tighter posture now.

What you bring them	Your answer
The tables above: your posture, the split, the reviewer, and code execution	
The group they expect to hold to a tighter posture, if any	

What you need back: a yes at the posture level, plus any group they need held to a tighter posture now.

Decide by:

Came back as:

Open items: anything in this module you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Decision: Spend

Lesson 9 · Spend caps

Context: Prepare your cap proposal for the budget owner. In many companies the budget owner commits the number; you bring the proposal, and configure the caps once it comes back.

Context: You are not forecasting tokens. If you have no usage history yet, pick a tier for each group (light, standard, or power, as the Claude Enterprise consumption guide suggests) and propose a starting number per member per month for the surfaces that group gets; if you have usage, re-base on it. The tiers size the group caps.

Fill in: In the Reasoning column, say why that tier and how you sized it: to typical usage; tight, raised on evidence; or with planned room for spiky work. Every cap here is a starting point with a review date, not an entitlement.

Group	Tier	Proposed starting cap (per member per month)	Approved cap	Reasoning
Pluto's Retail group, as a model	*Standard*	*Retail's standard-tier numbers for chat and Cowork, added together (Retail has no Claude Code)*		*Sized to typical usage; re-based after the first month's review*
	◯ **Light** ◯ **Standard** ◯ **Power**			
	◯ **Light** ◯ **Standard** ◯ **Power**			
	◯ **Light** ◯ **Standard** ◯ **Power**			

Hand off to: *budget owner*

Brief them so the number gets set, not just discussed. Bring the table above and the escalation split, and ask for the approved number for each cap.

What you bring them	Your answer
Your organization’s usage history (if available)	
Your proposed organization ceiling	
Members you already expect will need per-member overrides	
The escalation split: what you approve same-day, what goes to the budget owner	

What you bring them	Your answer
Seat default limit (the number every member gets before group limits apply)	
When a member is in two capped groups: the higher cap wins, or the lower cap wins (one organization-wide setting)	

What you need back: the approved number for each cap (record it in the Approved cap column).

Decide by:

Came back as:

Lesson 10 · Managing spend

Context: Set your spend-governance posture before usage exists; you'll adjust it as the reviews bring data in. The organization-wide default model applies to new conversations in chat, Cowork, Claude Code, and Claude for Microsoft 365; if your platform lead pins a model in Claude Code's managed settings, that pin wins for the CLI and IDE. Per-role default models and effort caps apply only to custom roles (built-in roles keep every model at any effort; the highest cap wins across roles).

Fill in: Start with the organization-wide default model, then add a row for each custom role that needs a different one, and name the groups that carry it.

Scope	Default model	Effort cap
Organization-wide		n/a (custom roles only)

What to decide	Your answer
Review cadence	
Who runs it	
The date of the first review, on the calendar	

What to decide	Your answer
Three things you’ll check before approving any increase	
Any group that gets its own spend review on top, and who runs it	

What to decide	Your answer
The three lines you'll add to your organization instructions (guidance Claude follows in every conversation, not a note to members)	
The note you'll send members, in your voice *It usually covers: ask for the short version when it will do; attach only the files a task needs; save the highest effort for work that needs it; clean up scheduled tasks; and how to ask for more when they hit their own limit (the in-product request goes to your Admins and Owners; if they hit the organization ceiling, tell them who to contact).*	

Hand off to**:** *budget owner*

Same brief as Lesson 9; add these. Brief them so the defaults and the review rule are agreed before anyone hits a cap. Otherwise the first request lands with no one able to answer it. Ask them to commit to a response time, not just to the rule.

What you bring them	**Your answer**
The defaults you’re proposing: the default model and effort cap	
Which model routine work runs on, and why (the default moves spend more than any cap)	
The review cadence	
The date of the first review	
The rule you’ll apply before approving any increase (your three checks), and how fast you need an answer	

What you need back: agreement on the defaults and the review rule, and the response time they will commit to.

Decide by:

Came back as:

Open items: anything in this module you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Decision: Visibility

Lesson 11 · Visibility: what you can measure

Context: You may not have Claude conversation records or telemetry to route yet. What you're naming is where your company already handles that kind of data, and who owns it: what reads conversation content today, what reads operational telemetry, and the policy that governs how long records are kept. Any piece with nowhere to land is one you'd be building from scratch: flag it in Open items before rollout.

Piece	The process or policy it plugs into today	Who owns that process
Compliance API (conversation content and audit events)		
OpenTelemetry (operational telemetry from Claude Code and Cowork)		
Retention window		

What to decide	Your answer
Your retention window, and the policy it matches (hard to undo)	
Compliance API on or off (the Primary Owner enables it)? Who reads it, and where does it land	
The trade-off the organization-wide window creates, and which teams you'll tell	

What to decide	Your answer
If the Compliance API stays off: the condition that turns it on	
Where telemetry lands	

Hard to undo: the retention setting moves, but history already deleted under the old window does not come back. Confirm it before go-live.

Hand off to: *the visibility owner you named in Lesson 2*

Bring the tables above. Brief them so you can set the retention window and switch visibility on before the groups that need it go live. Retention is one of the four hard-to-undo settings, so ask for an answer they're willing to stand behind, not a provisional one.

What you bring them	Your answer
The tables above: the three pieces, the retention window and its policy, the Compliance API and who reads it, and where telemetry lands	

What you need back: a retention window they will stand behind, their decision on the Compliance API (on or off) and who reads it, and where telemetry lands.

Decide by:

Came back as:

Lesson 12 · Adoption signals

Fill in: Set your pace goal against the rollout objective from Lesson 1. Finalize it with your stakeholders; this is the draft you bring them.

What to decide	Your answer
Checkpoints (which groups should be active by when) *Pluto's checkpoint, as a model: every business unit returning weekly by the end of the quarter, read on the weekly-active-members-by-group signal.*	
The signal you'll read each checkpoint against ("Every granted group returning weekly within eight weeks" is a pace; "good adoption soon" is a wish)	

What to decide	Your answer
What counts as on track versus behind: is Claude reaching each group, and are members coming back week over week (breadth)	
What counts as on track versus behind: how much each active member relies on it: chats per active member; skills, projects, and connectors in use (depth)	
The group you most expect to lag, and what a flat number there would prompt you to check first	
Read against the goal on:	

Hand off to: the unit leaders whose groups are on the checkpoints

Brief them so the checkpoint dates are ones their teams can absorb. Bring the table above.

What you need back: agreement that the checkpoint dates are absorbable.

Decide by:

Came back as:

Open items: anything in this module you can't close yet, who you need it from, and when you need it by:

Open item	Owner	What's blocking it	Decide by

Your rollout

Lesson 13 · How the decisions connect

Context: This section turns what you've recorded into the rollout plan you'll run. There are four finishing moves: confirm the four hard-to-undo settings, gather your five answers, close the open items, and sequence the work.

Fill in: Confirm each of the four hard-to-undo settings for your company: decided, or with a named owner and a decide-by date.

Setting	Decided?	Owner	Decide by
Domain claiming: whether and when you initiate it, and how you'll warn members first (Lesson 3)			
Organization topology: how many organizations you run (Lesson 4)			
Group structure: your group mappings (Lesson 5)			
Data retention: your retention window (Lesson 11)			

Fill in: Gather your five answers in one place, and tie each to your rollout objective. If you can't trace a decision back to the objective, it's worth a second look.

Decision	Your answer	Tie to your objective
1 · Structure & Identity (Lessons 4 and 5)		
2 · Access (Lessons 6 and 7)		
3 · Governance (Lesson 8)		

Decision	Your answer	Tie to your objective
4 · Spend (Lessons 9 and 10)		
5 · Visibility (Lessons 11 and 12)		

Fill in: Gather the open items from the sections above. For each, record who you need it from, what is blocking it, what it would take to unblock, and when it will be decided.

Open item	Owner	What's blocking it	What unblocks it	Decide by

Fill in: You decide in this order. No group goes live until step 5 is on for the groups that need the record.

The order you'll run it	Owner, and the date that step starts
1 · Structure & Identity: organizations, then groups (Lessons 4 and 5)	
2 · Access: surfaces, then connectors (Lessons 6 and 7)	
3 · Governance (Lesson 8)	
4 · Spend: caps, then defaults and review (Lessons 9 and 10)	
5 · Visibility on: Compliance API, telemetry, retention (Lesson 11)	
6 · Go-live, group by group; read adoption against the pace goal (Lesson 12)	

Lesson 14 · When a new product arrives

Fill in: Pick a Claude surface your organization doesn't use today and run the three questions on it: Who gets it? What does it carry? Does it move risk? If there isn't one, come back when the next surface ships; the questions are the same every time.

What to decide	Your answer
The surface you picked	
Who gets it (which groups' daily work calls for it, and in what phase)	
What does it carry (its own settings or connectors, or new grants it will need)	

What to decide	Your answer
Does it move risk (a new class of data, new autonomy, or new people, and who signs off)	
Where and when you'll re-run these three when the next surface ships (the person and the moment)	

Bring this document to your kickoff: walk your stakeholders through the decisions you've recorded and the open items still to close. Keep it after: as later decisions land across the rollout, this is where they live.