

6 Free Claude Cowork Rollout Templates

A readiness score tells you if you're ready; these six templates are how you actually roll out. They're the working documents behind a successful Claude Cowork pilot — a phased plan, a usage policy, a way to pick the right work, a pilot brief, the email that kicks it off, and a tracker that proves it worked. All free, all editable, nothing to fill in first — download the pack and start filling them in.

Template 1: 30/60/90-Day Rollout Plan

What it's for: A phased plan that takes you from a single pilot team to Cowork being the default way work gets done — with a goal, actions, an owner, and a success signal for each 30-day window.
Who uses it: The champion and the executive sponsor, set together at kickoff.

Set this at kickoff, review it at each 30-day mark. One phase per row — fill in the owner and adjust the actions to your team.

Phase	Primary goal	Key actions	Owner	Success signal
Days 1–30 Pilot	Prove value with one team	Pick 3–5 workflows; set the usage policy; land one first win; short daily check-ins		≥1 workflow saving real time; the team logs in weekly
Days 31–60 Expand	Add teams and workflows	Onboard a second cohort; enable the connectors you need; start a shared prompt / workflow library		3+ workflows live across 2+ teams; a growing team context folder
Days 61–90 Embed	Make it the default	Review success metrics; formalize the usage policy; decide expand / formalize / bring in training		Hours saved measured; a named owner and a plan for next quarter

Fill in for your team

Pilot start date

Champion (owns rollout)

Executive sponsor

30-day review date

60-day review date

90-day decision date

Template 2: Cowork Usage Policy

What it's for: A short, copy-paste policy that answers the question that stalls most rollouts: what data may go into Claude, who decides, and what has to be checked before output goes out.

Who uses it: Whoever owns data/security, co-signed by the champion. One page, pinned where the team can find it.

Adapt the bracketed parts to your org, delete what doesn't apply, and pin it where the team works. Keep it to one page — a policy nobody reads protects nobody.

Approved uses

- Drafting, summarizing, and analyzing non-sensitive documents and text.
- Brainstorming, planning, and research.
- Code assistance on approved repositories.
- Anything you'd be comfortable sharing with a trusted outside vendor.

Do NOT put into Claude

- Customer or employee personal data (PII).
- Passwords, API keys, or other secrets.
- Regulated data (health, financial, legal) unless [policy owner] has approved that use.
- Anything covered by an NDA or marked confidential, unless approved.

The rules everyone follows

- Review AI output before sharing it externally or acting on it.
- Use only the connectors [company] has approved.
- If you're unsure whether something is OK to use, ask [policy owner] first.
- Save reusable prompts and workflows in the shared team folder.

Fill in for your org

Company

Policy owner / who to ask

Approved connectors

Data-classification reference (if any)

Effective date

Template 3: Workflow Scorecard

What it's for: A quick scoring grid to turn a vague sense of "Claude could help with stuff" into a ranked shortlist of the recurring work worth automating first.

Who uses it: The pilot team, in one working session. The disagreements are the useful part.

List your candidate workflows, score each, and start with the ones that score High: frequent, time-consuming, inputs Claude can reach, and you have a "good" past result to steer the quality bar.

Candidate workflow	How often	Time now (est.)	Inputs Claude can reach?	Have a 'good' example?	Priority (H/M/L)
e.g. Weekly ops summary (Metamorfeus)	Weekly	~90 min	Yes — Drive	Yes	H

The first row is a synthetic example. "Time now" is your own estimate — a rough number is fine; you'll replace it with measured data in the Hours-Saved Tracker.

Template 4: Pilot Team Brief

What it's for: A one-pager that pins down what the pilot actually is — who's in it, what it's pointed at, the first win, how you'll know it worked, and the risks — so the pilot has a shape instead of drifting.

Who uses it: The champion drafts it; the sponsor signs off before day one.

Pilot name

Champion

Team members

Start date

End date (30-day review)

Three workflows we're pointing Cowork at

1.

2.

3.

Our first win (simple enough to land in week one)

How we'll know it worked

Success metric 1

Success metric 2

Known risks / blockers

Risk	Owner	Mitigation

Template 5: Launch Comms Email

What it's for: The email that kicks the pilot off — what's happening, why, what you need from the team, and the ground rules — written so a champion can send it in two minutes.

Who uses it: The champion or sponsor sends it to the pilot team on day one.

Replace the [bracketed] parts and send. Keep it short — the goal is to get the team in and trying it, not to explain everything up front.

Subject

We're piloting Claude Cowork — here's what it means for [team]

Body

Hi team,

Starting [start date], [Metamorfeus / your team] is running a 30-day pilot of Claude Cowork. The goal is simple: take a few of the repetitive things we do every week — [e.g. the weekly ops summary, first-draft reports] — and see how much time Claude can save us.

What we need from you: about [1–2 hours] this week to learn the basics, and your list of the repetitive tasks you'd love to hand off. Bring those to [kickoff session / the shared doc].

Two ground rules while we pilot: don't paste in [customer data or anything confidential], and always check Claude's output before it goes out. Our usage policy is here: [link].

[Champion name] is leading this and is your go-to for questions. Let's find out what this saves us.

— [Your name]

Template 6: Hours-Saved Tracker

What it's for: A simple log that turns "it feels faster" into a number you can take to leadership: minutes saved per task per week, rolled up to hours per month.

Who uses it: The champion maintains it; the whole pilot team drops rows in as they go.

One row per recurring task. Fill "mins before" from your own baseline and "mins with Cowork" once you've run it a few times.

Task	Person	Times / week	Mins before	Mins with Cowork	Mins saved / week	Notes
e.g. Weekly ops summary	A. (Metamorfeus)	1	90	25	65	Est. — refine after 2 weeks

The first row is a synthetic example. Treat early figures as estimates — they get more accurate as the team settles in. Monthly roll-up: $\text{total mins saved} \div 60 = \text{hours saved}$.

How the Templates Fit Together

The six aren't a random grab-bag — they're a sequence. Each one hands off to the next, from "are we ready?" through to "here's the proof it worked."

1. **Team Readiness Checklist** — Are we ready to roll out at all?
2. **Pilot Team Brief + Usage Policy** — Set the pilot up with a shape and safe data rules.
3. **Workflow Scorecard** — Pick the recurring work worth automating first.
4. **30/60/90 Rollout Plan** — Sequence the rollout across the first three months.
5. **Launch Comms Email** — Bring the team in and get them trying it.
6. **Hours-Saved Tracker** — Prove what it saved — the number you take to leadership.

New here? About Claude Cowork Training

These are free resources from Claude Cowork Training — practical, no-fluff training that helps teams actually adopt Claude Cowork, not just try it once and drift back to old habits. Everything on the site is hands-on: a free, self-paced course that takes a team from first task to a shared workflow library, downloadable guides and templates like these, and live team-training workshops for companies rolling Cowork out on real work.

Made by Peter Velinov, a Claude Certified Architect (Foundations) and the trainer behind Claude Cowork Training. He builds the courses, guides, and workshops here from hands-on team-rollout work — no theory-only advice.

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Assembled by Peter Velinov, Claude Certified Architect - Foundations

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