

The 27-Point Claude Cowork Team Readiness Checklist

Before you roll Claude Cowork out to a team, run this quick audit. Twenty-seven yes/no questions across the four things that actually decide whether a rollout sticks — licenses and access, data rules, the work you'll point it at, and a real adoption plan. Count your yeses, check your score, and you'll know exactly where you stand. It's free, and there's nothing to fill in — just download it.

Section A — Licenses & Access

Can everyone actually get in, on a plan that includes Cowork, with the connectors they need?

- ☐ 1. Everyone who will use Cowork has a Claude account on a plan that includes it.
- ☐ 2. Someone owns billing/admin and can add or remove seats.
- ☐ 3. Seat count is known and pilot budget is approved.
- ☐ 4. Login method (Google / SSO / email) is decided and works org-wide.
- ☐ 5. The team can reach claude.ai and the Cowork interface with no firewall / network block.
- ☐ 6. Connectors you need (Drive, GitHub, Slack...) are permitted by IT, at least for a pilot.
- ☐ 7. An admin can approve or install the connectors / MCP servers the team needs.

Section B — Data & Security Rules

Is it clear what data may go into Claude, who decides, and how output gets checked?

- ☐ 8. There is a written rule for what data may and may not go into Claude.
- ☐ 9. You know your org's stance on AI processing company data (approved / under review / restricted).
- ☐ 10. Sensitive categories (PII, customer data, financials, source code, legal) have handling rules.
- ☐ 11. Your plan's data-retention & training settings have been confirmed against policy.
- ☐ 12. A named person can answer "is it OK to use Claude for X?"
- ☐ 13. There's a rule to review AI output before it's shared externally or acted on.
- ☐ 14. Regulated / compliance constraints (GDPR, HIPAA, SOC 2 scope) checked against intended use.

Section C — Workflow Candidates

Have you picked real, recurring work to point Cowork at — and one first win you can land in week one?

- ☐ 15. You've listed 3–5 recurring, time-consuming weekly tasks.
- ☐ 16. At least one candidate is document / text-heavy (drafting, summarizing, analysis).
- ☐ 17. The inputs live somewhere Claude can reach (files, Drive, GitHub) or can be pasted in.
- ☐ 18. You can roughly estimate current time-per-task as a baseline (an estimate is fine).
- ☐ 19. You've picked one “first win” simple enough to succeed in week one.
- ☐ 20. You have an example of a “good” past result to steer Claude's quality bar.

Section D — Training & Adoption Plan

Is someone actually driving adoption, with time booked, wins shared, and a next step after the pilot?

- ☐ 21. One named person owns rollout (a champion) — not “everyone, eventually.”
- ☐ 22. Time is actually scheduled for the team to learn it (not “figure it out between meetings”).
- ☐ 23. There's a shared place for prompts / workflows so wins get reused (a team context folder).
- ☐ 24. Success metrics are defined (hours saved, tasks automated, adoption %) — estimates OK.
- ☐ 25. Leadership is aware / supportive, or you know how to make the ROI case.
- ☐ 26. You have a 30-day feedback loop for what's working and what's stuck.
- ☐ 27. You know the next step after the pilot: expand, formalize, or bring in live team training.

Score Your Team

Give yourself one point for every “yes”, out of 27. Find your total below.

22–27 Ready	Start now. You've got the foundations — a workshop mostly helps you move faster and get the whole team consistent from day one. → See team training options: claudecoworktraining.com/teams/training/
14–21 Close	A few gaps to close first — usually a data rule, a named champion, or a concrete first workflow. Close those, then roll out. → Follow a 30/60/90 rollout plan: claudecoworktraining.com/guides/rollout-plan/
Below 14 Groundwork	Foundations first. Sort licenses, access, and data rules before you invite the team in — rolling out onto shaky ground is how pilots quietly die.

How to Use It

1. Score it as a team, not solo.

Sit the people who own licenses, data policy, and the actual work in one room (or one doc) and answer the 27 questions together. The disagreements are the useful part — a “yes” IT assumes and a “no” the champion knows about is exactly what you want to surface now.

2. Count your yeses and read your band.

One point per yes, out of 27. Drop your total into the scoring bands below to see whether you're Ready, Close, or need Groundwork first — and what the sensible next move is for each.

3. Turn the no's into a short punch-list.

Every “no” is a rollout risk with an owner's name on it. Assign each one and put a date on it; that list is your pre-launch plan. Prefer an interactive scored version? The readiness assessment walks you through it.

New here? About Claude Cowork Training

This is a free resource 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 this one, 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.

- › Start the free course: <https://claudecoworktraining.com/course/>
- › Meet Peter: <https://claudecoworktraining.com/about/>
- › Browse more free resources: <https://claudecoworktraining.com/resources/>

Free resource from Claude Cowork Training — claudecoworktraining.com/resources/team-readiness-checklist/

Written by Peter Velinov, Claude Certified Architect - Foundations

Claude and Claude Cowork are trademarks of Anthropic. This checklist is an independent training resource and is not affiliated with or endorsed by Anthropic.