

Claude for Business — Organisational Setup Checklist

Configure Claude safely for your whole organisation



1 Before You Start

- ☐ Purchase a Claude commercial plan: the tiers are **Team** (minimum 5 seats) or **Enterprise**, at claude.ai.
- ☐ Confirm you are the designated Workspace Admin or Owner for your organisation.
- ☐ Prepare your Organisation Instructions (see Section 2 guidance).
- ☐ Identify who will be the secondary admin, always have a backup.
- ☐ Decide on your data handling and acceptable use policy before rollout.

2 Organisation Instructions — What to Include

These instructions are applied across every conversation for every user in your workspace (up to 3,000 characters), setting the context Claude operates within. They take precedence over individual user instructions.

- ☐ Business name and industry context, so Claude knows who it is working for.
- ☐ Tone and communication style (formal, friendly, technical level).
- ☐ Language requirements, for example "Always use Australian English spelling".
- ☐ Data handling rules, for example "Never include customer PII in prompts".
- ☐ Topics or content types to avoid.
- ☐ Default output formats preferred by your team.

3 Key Settings in the Admin Console

- ☐ Navigate to Organisation settings, then Organisation and access.
- ☐ Paste your Organisation Instructions into the designated field.
- ☐ Enable web search for your workspace to allow real-time information retrieval.
- ☐ Configure memory settings (on the Team plan, each user controls their own memory).
- ☐ Review and set usage limits per user to manage spend.
- ☐ Enable or disable specific capabilities based on your security requirements.

4 User Access and SSO

- Invite users via Admin settings, then Members (individual invite or bulk CSV).
- Configure Single Sign-On. Claude supports **SAML 2.0 and OIDC**; SCIM auto-provisioning is available on the Enterprise plan.
- Assign admin roles: Owner, Admin or Member as appropriate.
- Enable the desktop app download permission for users who need Cowork or Code features.
- Remove access immediately for any departing staff.

5 Data Residency and Compliance Review

⚠ Important: Data Residency Advisory

On the standard claude.ai product (Free, Pro, Team), data is stored in the United States and may be processed on overseas servers. There is no Australian data residency option on claude.ai itself.

If you require Australian data residency, Claude is available with Australian (Sydney) regional storage and inference through **AWS Bedrock** and **Google Vertex AI**. Review the right path with your legal and compliance team before processing any sensitive or regulated information.

- Confirm with your legal or compliance team before processing sensitive data.
- Never paste customer personally identifiable information (PII) into prompts.
- Review Anthropic's Privacy Policy and Data Processing Addendum at anthropic.com/legal.
- If you handle government data or regulated information, seek specific legal advice.
- Consider whether your cybersecurity policy needs updating to cover AI tool usage.

6 Compliance Review Prompts

Run these prompts with your team to sense-check your setup and policies before going live:

"What categories of information should our staff never include in Claude prompts?"

"Review our [document type] for compliance with [regulation]. Flag any risks."

"What questions should we ask our AI vendor about data security and residency?"

Need a cybersecurity review of your AI tools? Talk to AUCyber, aucyber.com.au/contact