✳ ANTHROPIC × VISA

COWORK ENABLEMENT · MARKETING

Cowork, at *work.*

Delegate real work, get finished deliverables back, and teach Claude the way your team works. What Cowork is, the habits that make it strong, and one real workflow end to end.

SESSION
September 2026 · 60 min · 2 runs

AUDIENCE
Visa · Marketing

PRESENTED BY
Anthropic

ORIENTATION

Before *we begin.*

How to think about Cowork, when to use Chat or Claude Code instead, and the question everyone asks first.

What Cowork is, and how to *make it yours.*

If you have never opened Cowork, the first half hour is for you. If you already use it, the demo and the habits are the new part. Either way, you leave with one workflow to run this week.

HOUSEKEEPING Q&A at the end, but do not wait: drop questions in the chat and we answer them as we go. This session is recorded; the deck and every link come with the recording.

1 **Get started & best practices · 30 min**

Why Cowork, Meet Cowork, and Make it yours: what it is, what changes on day one, and the habits of strong use, for Marketing.

2 **Live demo · 20 min**

One real workflow, start to finish: use it, shape it, show it, share it. Only what you saw in the first half.

3 **Q&A & next steps · 10 min**

Your questions, what to try tomorrow, and where this goes next.

HOW TO THINK ABOUT IT

A smart new colleague, *not a search box.*

Brilliant, reads everything, joined this morning. Delegate to it the way you would to a colleague: a brief, a folder, a deadline.

1

Reads everything in the folder

Point Cowork at a folder and at your connected systems. It has read all of it before you have opened the first file.

→ Context first.

2

Works to a brief

One sentence describing what done looks like. It plans the steps, does the work, and hands back the deliverable.

→ Describe done, not the keystrokes.

3

You're still the reviewer

It can state something with total confidence that does not survive a second look. Start with work you already know the answer to.

→ Judgment stays with you.

ONE MORE THING

How senior the colleague is depends on the model you pick. It lives in the Claude desktop app; the whole demo runs there.

COWORK VS CHAT

If it's work, *start in Cowork.*

Chat is great for quick questions and brainstorming. Use Cowork to get complex, deep work done.

Chat

Where you think.

- Exploring ideas, or brainstorming
- Iterating on a draft together
- Quick questions, or a fast analysis

WHAT YOU GET

A good answer, fast.

Cowork

Where the work gets done.

- Multi-step projects with a clear end goal
- Several tasks at once, without hand-holding
- Finished files, not copy and paste text
- Work that spans tools: your drive, your chat, local files
- Work where Claude navigates or acts on websites

WHAT YOU GET

Finished work, ready to review.

A COMMON QUESTION

Cowork vs *Claude Code.*

Choose by the task and the outcome, not by the tab. Same skills, same models, same app.

Cowork

The work you would do by hand.

- The memo, the redline, the model, the deck, the brief
- Works in your folder and your systems
- Produces the actual file, checks its own work
- Runs on a schedule

WHAT YOU GET

The finished deliverable, ready to review.

Claude Code

Builds what runs.

- Code, a pipeline, an automation
- Terminal and repos instead of documents and connectors
- Based on your roles, you will rarely need it

WHAT YOU GET

Something that runs, shipped.

THE QUESTION WE GET MOST OFTEN

Is it *private?*

Yes. Enterprise data is not used to train Anthropic models by default. Treat it the way you treat email or any other internal tool.

Not used for training

Your data stays out of model training, and is never shared with other customers.

Independently attested

SOC 2 Type II, ISO 27001, ISO 42001. Encrypted at rest and in transit.

You set retention

Your admins set retention. The no-training commitment applies regardless.

One place to check

trust.anthropic.com, plus the whitepaper for your security team.

WHY COWORK

Let's start *with why.*

What changes on day one, and the jobs to hand over first.

WHY COWORK

Finished work, *and your expertise, scaled.*

Starts informed

01

Plugged into your folder and your systems. Every task starts from everything, not from scratch.

"Everything you need is already in the folder."

The work gets done

02

Weeks of work becomes minutes of review. Research, drafting and analysis handed off: you drive strategy.

"I reviewed it. Ship it."

Finished deliverables

03

Formatted decks, populated spreadsheets, real analysis. Ready to share, not a starting point.

"Save it as a real file in the folder, ready to send."

Depth costs a sentence

04

Going deeper is one more line in the brief, not another day of work.

"Now run the same cut for every region."

Your playbook, captured

05

Workflows become skills: packaged once, run the same way by everyone.

"/quarterly-review, same quality, every desk."

Works ahead of you

06

Scheduled jobs and long-running tasks. Reports land before you ask.

"It was waiting for me Monday morning."

THE RESULT

Your time goes to judgment, relationships, and the decisions only you can make. At your level, and your team's.

WHAT TEAMS AUTOMATE FIRST

Six jobs you can *hand over tomorrow.*

The meeting brief

01

The account, the history, the open items, the agenda. Ready before you walk in.

"Prep me for tomorrow's meeting from these notes and the thread."

The deck for the review

02

From a folder of data to a formatted draft deck, narrative included.

"Build the business review deck from this folder. Our template, ten slides."

The market read

03

Research, synthesis and a finished write-up. Depth that was hard to justify by hand.

"Size this market. One page, sources cited, the three numbers that matter."

The batch job

04

One instruction, a whole folder of files. The tracker updated, forms filled, documents generated.

"For each vendor file in this folder, update the tracker and draft the contract."

The Monday report

05

On a schedule, from whatever is in the folder that week. It lands before you ask.

"Run this every Monday morning and save the result in this folder."

The live dashboard

06

An interactive page anyone can open in a browser. No licence, no login.

"Turn this CSV into an interactive dashboard, saved as one HTML file."

FOR MARKETING AT VISA, SPECIFICALLY

Your six priority applications, *with Cowork on each.*

Insight
01

Arrive at a compelling consumer or B2B insight to inform a campaign approach or brief.

Analytics
02

Visualize campaign and sales data in a modern way.

Creative
03

Arrive at creative concepts, test them, advance them into pre-production.

Optimization
04

Test and learn, and turn what you find into shifts in plan.

Orchestration
05

Optimize journeys across channels.

Strategy & Planning
06

Synthesize strategy, budgets, OKR development and reporting.

LIVE DEMO · 20 MINUTES

Enough slides. *See it live.*

Four steps, live, with only what you have seen in this deck.

ONE DRIVE FOLDER OF FIVE FILES · A GROUNDED BRIEF · A SKILL BUILT ON STAGE · SCHEDULED FOR MONDAY · A DASHBOARD ANYONE CAN OPEN

THE NEXT TWENTY MINUTES

Four moves, *live.*

1 Use it

Value on day one, with what's already there.

2 Shape it

Cowork automates your critical workflow, the way you want it done.

3 Show it

Share the work as artifacts anyone can open.

4 Share it

Hand it to your team, or to the whole company.

LIVE DEMO

The demo flow: *four steps.*

VISA MARKETING · MONDAY MORNING

One Drive folder of five files. Watch a ready-made brief become your skill, your Monday routine, and a dashboard anyone can open.

Real marketing files, one folder, and only what you have seen in this deck. No edits between steps.

→

THE FOUR STEPS

1. **Make it yours**
   The pre-baked grounded brief gets your house rules, then becomes /q4-campaign-brief, built live and rerun in one line.
2. **Schedule it**
   The Monday routine runs the brief skill on the folder and drafts the ops email. It lands before you ask.
3. **Share with your team**
   The skill is one .md file: download it and pass it along. Your admins can enable native sharing later.
4. **Make it an artefact**
   The campaign numbers become an interactive, on-brand dashboard anyone can open. No licence, no login.

MEET COWORK

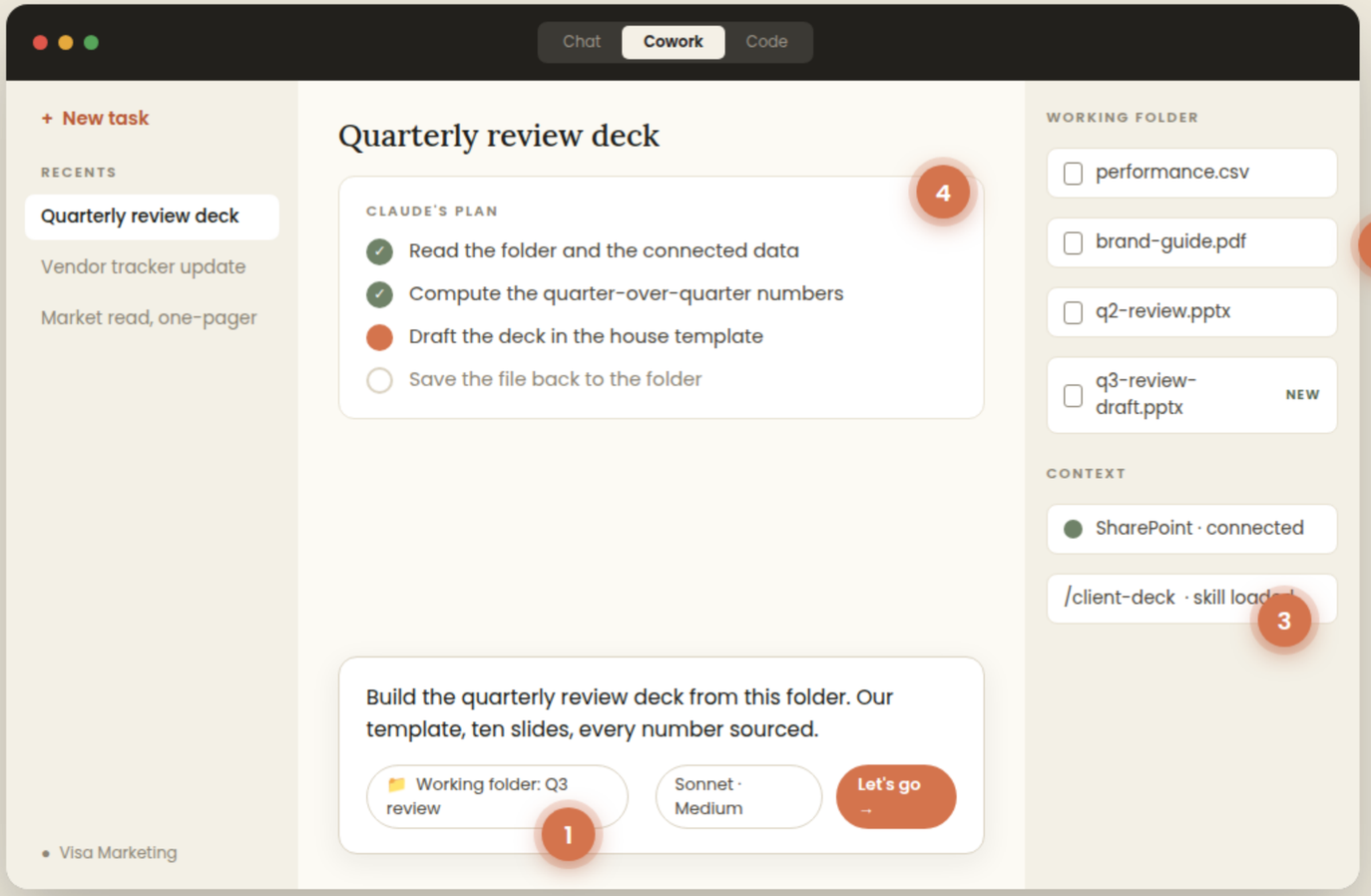
So what does it *actually look like?*

The screen, then the three best practices of strong use.

MEET COWORK

The whole task, *on one screen.*

The Claude desktop app, Cowork tab, recreated here. A brief, a folder, and progress you can check.



1. **Your brief**
   One sentence describing what done looks like. The outcome, not the keystrokes.
2. **Your files, in the working folder**
   Inputs in, finished deliverables out. They stay across sessions.
3. **Standing context**
   The connectors and skills loaded for this project.
4. **Progress you can check**
   It plans the steps, works through them, and shows where it is.

THE DIFFERENCE FROM CHAT

In Chat, you upload a copy and get text back. In Cowork, Claude works on the actual file and hands back the actual deliverable.

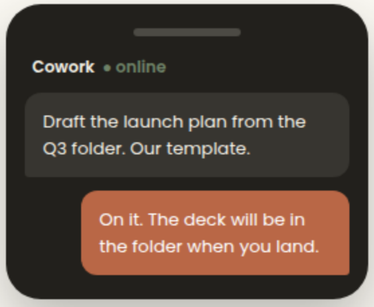
The work doesn't stop *when you do.*

Steer from anywhere

Your phone is a remote control.

Kick off a task from the airport; land to a finished deck.

Your files, connectors, projects and skills, wherever you are.

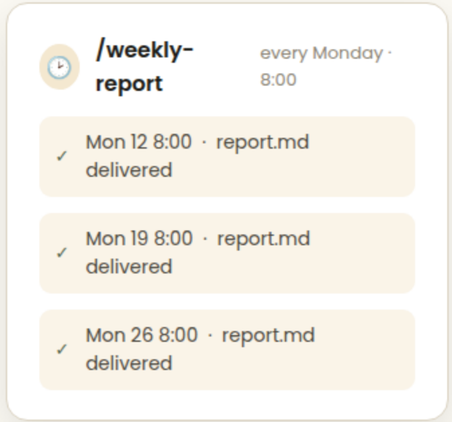


Schedule it

Recurring work runs itself.

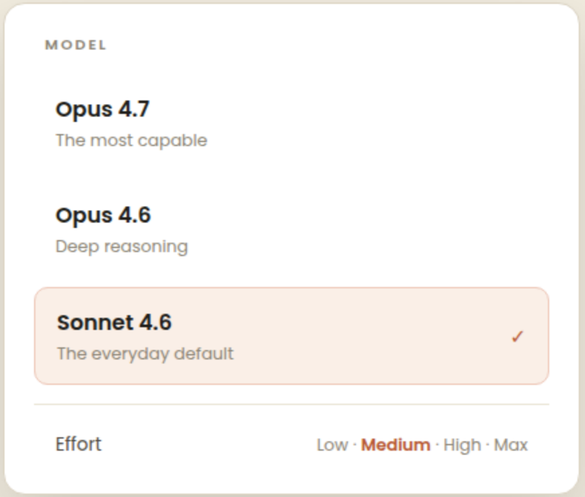
Weekly reports, daily digests, recurring reviews.

Waiting for you Monday morning, before anyone asks.



Which model, *when.*

How senior the colleague is. One rule for the picker: how hard is the thinking you're asking for?



Opus 4.7

THE MOST CAPABLE

The most capable model in your lineup: the most demanding reasoning and the longest-running work.

TRY IT: *"Take the whole campaign folder and build the strategy case, both sides."*

Opus 4.6

DEEP REASONING

The hardest daily work: long documents, nuanced analysis, multi-step reasoning. Quality over speed.

TRY IT: *"Read the whole folder. What contradicts the plan, and where exactly?"*

Sonnet 4.6

START HERE

The everyday default. Fast, and strong enough for most of the team's work.

TRY IT: *"Turn these notes into a three-bullet status update."*

MORE MODELS LATER

These three are what your instance has today. Other Claude models may be enabled later by your admins; the picker in your app is the source of truth.

THE EFFICIENCY RULE

Match the model to the job and the cost takes care of itself.

BEST PRACTICES · 3 OF 3

Efficiency is a habit, *not a setting.*

Four habits make the answer better and make the team's shared capacity go further.

The model you pick

Match the model to the job. Opus where the thinking is hard, Sonnet for the everyday.

Treat Effort as the depth dial. Down for the quick take, up for the densest work.

SAY:
"A tracker update? Sonnet, medium effort."

The folder you point at

The files the task needs, not your whole drive. Small folder, sharp answer, faster run.

Pin the standing context once. Project instructions, connectors and skills carry it, so every brief stays short.

SAY:
"The brand guide and the CSV are enough."

The brief you write

Say what done looks like. The format, the sources, the length.

New task, new brief. Don't drag last week's job along.

Steer early. One better brief beats ten corrections.

SAY:
"One page, our template, cite every number."

The work you schedule

Treat Cowork as an agent, same as Claude Code: delegate the whole task, not just the next message.

Schedule it in advance. Recurring work runs itself. The Monday morning brief in the demo is the pattern.

SAY:
"Schedule it for Monday. Don't ask for it."

WATCH FOR IT IN THE DEMO

The demo brief names the folder, the sources and the format. That's the whole prompt.

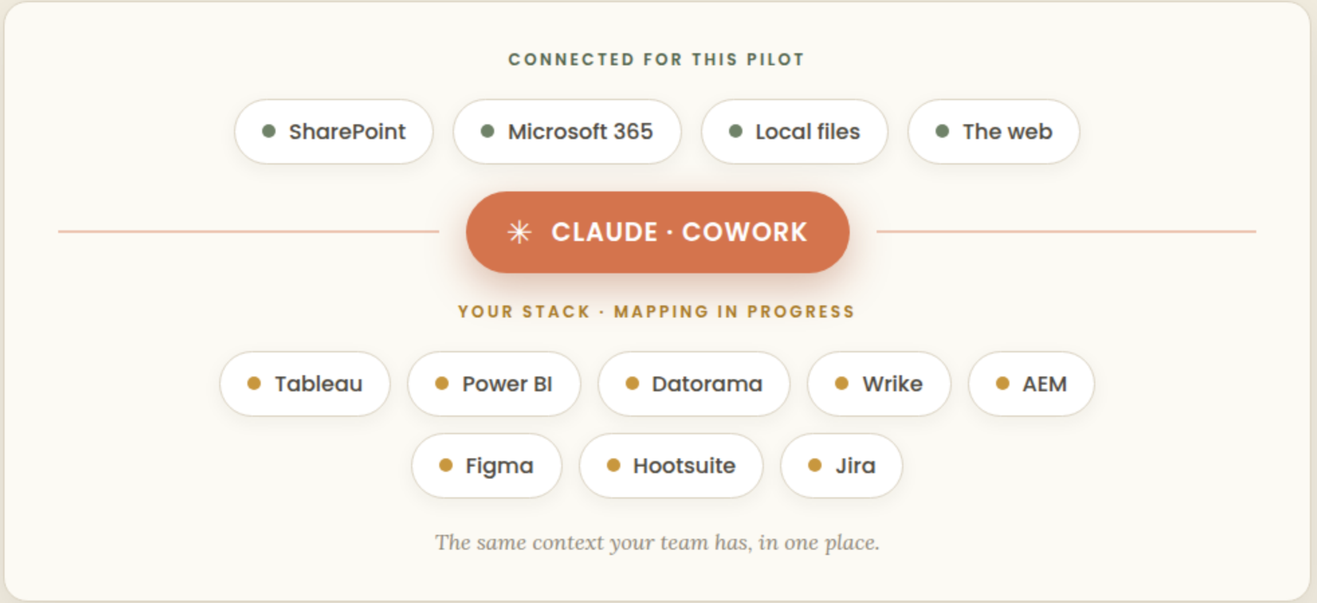
MAKE IT YOURS

Claude for you, in your role, *at Visa.*

Connect your systems, write down how your team works, and hand both to the whole org.

Connect your systems *to Claude.*

Claude operates with the same context your team has, centralized in one place.



1. **Live today**
   SharePoint and Microsoft 365 are connected for the pilot. The live demo runs on them, and on one folder.

2. **Mapping in progress**
   Tableau, Wrike, Datorama, AEM, Figma, Hootsuite, Jira, Power BI: we are validating which connector each use case needs, with your team.

3. **A note on CRM**
   Visa's CRM is Microsoft Dynamics, tightly controlled. Nothing in this training depends on a CRM connector.

TRY IT TODAY

Point Cowork at one SharePoint folder you already work from. That is the whole setup.

MAKE IT YOURS · SKILLS

Skills encode how your team *actually works.*

Your templates, your process, your standards: written down once, run by everyone the same way.

1. **One page, plain English**
   When to use it, the sources, the format, the house rules. No code; anyone on the team can read and edit it.

2. **Call it by name**
   Type / and the name: /pipeline-review, /call-prep, /client-deck. Claude knows the format and asks nothing.

3. **One skill, every Claude product**
   Prototype it in Cowork, productionize it as an agent. No rewrite.

YOURS TO BUILD

Anyone can create one: describe the workflow once and Claude writes it down. You'll watch a skill get built in the demo.

/client-deck

SHARED WITH THE TEAM

WHEN TO USE IT

Any deck that leaves the building. Claude may also trigger it when the ask matches.

SOURCES, IN ORDER

The template first, then the folder. Compute before writing.

FORMAT

Ten slides, our fonts, every number sourced.

HOUSE RULES

The insight goes first. No claim without a citation.

One page. What you are reading is the entire skill; there is nothing more behind it.

MAKE IT YOURS

Skills flow in *every direction.*

One person writes the workflow down. Everyone runs it the same way.

STEP ONE

You build it

From a workflow you already run: the steps, the template, the standard.

→

STEP TWO

Your team runs it

Same process, same quality, every time. Nobody retypes the brief.

→

STEP THREE

Your org adopts it

The best skills travel across teams, and improvements flow back to everyone.

MAKE IT YOURS

Distribute expertise *to your org.*

Connectors

Your systems, and the context that lives in them.

\+

Skills

Your ways of working, written down.

=

A plugin

Your expertise, installable in one click. Everyone who installs it works your way.

AT VISA

Not available at Visa yet. We are working with your teams to enable it. Meanwhile a skill travels as one .md file: download it and pass it along. Your admins can enable native sharing and org skills later.

MAKE IT YOURS

The compounding *effect.*

- **Every task teaches the next**

  What you set up once, instructions, skills and project files, is still there next time. **You never start from scratch.**

- **Build a skill once, everyone runs it**

  Anyone who turns your skill on works the way your best person does. **On every desk.**

- **Better the more you use it**

  The more your team hands over, the more of how you work gets written down. **Most software does not do that.**

THE LAST TEN MINUTES

What's *next.*

Where to go from here, what to try tomorrow, and what has just shipped.

THIS IS A PROGRAM, NOT A ONE-OFF

Where to go *from here.*

Four places to go after today, in order.

1 · Claude Academy	The free Cowork course, plus the use-case library for **Marketing**.
2 · How Anthropic uses Claude	Our own teams, on real work. **Watch this first.**
3 · The getting-started guide	Projects, connectors, skills and scheduled tasks, step by step, in the help center.
4 · The plugins themselves	Every skill is published in full. Read before you install; **nothing is a black box.**

TOMORROW MORNING

Your turn: four steps, *in order.*

Exactly what you just watched, on one real task of yours.

1 · Point Cowork at a folder	One folder, the real files one task needs. **Start with work you already know the answer to.**
2 · Ask for one deliverable	Something you would do by hand this week. You can judge the output on day one.
3 · Build your first skill	From a task you repeat, like the brief in the demo. Tell Claude how you do it.
4 · Schedule it, share it	Monday's version lands by itself; pass the .md to one colleague first. **Bring it back to the next session.**

THE BAR

You just watched all four in twenty minutes. Each one is smaller than it looks.

WHAT'S NEW

Already *shipping.*

Four recent launches, all publicly announced and live today. The pace is the point.

01

Your work follows you

Cowork is live on web and mobile, beyond the desktop. Start at your desk, steer from your phone; the work keeps going in the cloud.

"Start at your desk. Approve from your phone."

LIVE · JULY 2026

02

One memory, chat and Cowork

Memory now carries across chat and Cowork, with topics you can see and edit. Context from a chat is there when you hand over the work.

"It already knows the project."

LIVE · AUGUST 2026

03

One home, one composer

Chat and Cowork share a merged home with a single composer. You describe the task, and the choice of surface stops being your problem.

"Stop choosing tabs. Just ask."

LIVE · AUGUST 2026

04

Acts in Microsoft 365

With admin consent, Claude drafts and sends email, manages calendars, and updates files in OneDrive and SharePoint.

"The ops email is already drafted."

LIVE · JULY 2026

Q&A · NEXT STEPS

Let's get *started.*

Pick one workflow. Build it tomorrow.

Give Claude a proper brief on one thing you actually have to do this week, and review the output the way you would review a colleague's draft. Bring it back to the next session.

WHAT HAPPENS NEXT

Security architecture review, pilot scoping, champions for Marketing.

SELF-SERVE LEARNING

Claude Academy, and every link in the follow-up email.

QUESTIONS

In the chat and live, right now.

Enterprise controls, *today and next.*

ON THE ROADMAP

- Customer-managed encryption keys (CMEK)
- EU and international data residency
- IdP federation and multi-org governance
- Expanded spend controls and value analytics

Roadmap items, not commitments with dates.

RBAC and provisioning

Self-serve role-based provisioning. Group-based spend caps per IdP group. Per-user plugin provisioning. Granular MCP permissions.

Auditing and visibility

OTEL monitoring, available today. Compliance API. Full visibility into actions and capabilities.

Deployment flexibility

Run Cowork with inference on Amazon Bedrock, Google Cloud Vertex AI, or Microsoft Foundry.

Admins manage Cowork access and plugin provisioning in Admin settings.