GIVING CLAUDE ACCESS

Applications and Data Claude Can Access

Claude can reach into the tools Stratus already runs on: Salesforce, M365, your call recorder, ZoomInfo, and more. Here is what it can see, where it can see it, and what it can do with it.

AUDIENCE	READ TIME	PREREQUISITES
Sales & ops staff	**~6 minutes**	**A paid Claude plan; connectors enabled by your admin** *(confirm Stratus's setup)*

01 What "connected tools" means

A **connector** is a secure link between Claude and one of your systems: Salesforce, HubSpot, monday, Microsoft 365, and the rest. Once it's connected, you can ask Claude to *look something up* or *do something* in that tool in plain English, and it works directly with the live data. No exporting, no copy-paste.

Connectors are what turn Claude from a smart writer into something that knows your actual pipeline, your real accounts, and last week's calls.

> **NOTE** A **connector** gives Claude *access* to a system. A **Skill** tells it *how* to handle a task, and a **Project** gives it *background* to work from. The connector is the pipe; the others shape what flows through it.

02 What Claude can access, and where

Both Chat and Cowork use the same connectors. Cowork adds a few things only it can reach (your local files and your browser) because it runs on your desktop as a delegated agent.

WHAT CLAUDE CAN REACH	IN CHAT	IN COWORK
Connected tools Salesforce, HubSpot, monday, ZoomInfo, Confluence, M365, Slack, call intel	✓ Read & write, with you in the loop each step	✓ Read & write across multiple steps; approval before anything irreversible
Files you upload	✓ Drag them in	✓ Drag them in
Local files & folders on your machine	– No	✓ On the desktop app, with your permission
Your live browser session	– No	✓ Via Claude in Chrome
The web Search + read pages	✓ Yes	✓ Yes
Project knowledge	✓ Yes	✓ Shared across both

03 Read vs. write, and who Claude acts as

Reading is the easy part: ask, and Claude pulls what's there. **Writing** (creating a Salesforce record, posting to Teams, sending an email) is where the guardrails live:

- **In Chat**, Claude makes changes when you ask it to, in the moment. You see each action as it happens.
- **In Cowork**, Claude can chain many steps on its own, but it **pauses for your approval before anything irreversible**: sending, publishing, deleting. You can raise or lower those trust levels per action type.

GOTCHA Claude connects **as you**. Every connector uses your own login, so Claude can only see and do what *your* permissions already allow, nothing more. That's the good news for governance (it can't reach past your access), but it also means: if a teammate can't see an account, Claude in their seat can't either, and anything Claude writes is attributed to you. Connectors also have to be enabled per surface, and some (like ZoomInfo and your call recorder) are effectively read-only.

04 Is your tool compatible? MCP, in plain terms

Most of what Stratus runs on already connects. When you hit a new tool, here's how to know whether it *can*, and how to wire it in.

What makes it possible: MCP. Claude talks to your tools through the **Model Context Protocol**, an open standard Anthropic introduced in late 2024. Instead of a one-off integration built for every app, a tool implements MCP *once* and becomes available to Claude. A "connector" is simply Claude hooked up to a tool's **MCP server**.

Three ways a new tool shakes out

1. **In the directory.** Open **Settings → Connectors** and browse. If it's listed, it's one click, and the directory page spells out that tool's read/write capabilities *before* you connect. (Salesforce, HubSpot, monday, ZoomInfo, M365, and Confluence all live here.)

2. **Has an MCP server but isn't listed.** Add it as a **custom connector** using the vendor's remote MCP server URL. Anything that supports MCP can connect this way, including internal tools you build yourself.

3. **No MCP server.** It can't connect directly yet. Sometimes you can still reach its data through a system that *is* connected, but there's no native link.

What it gives access to: exactly what that server exposes, a defined set of read and (often) write actions, nothing more. You can set each action to *always allow*, *ask first*, or *never*.

Getting it connected

1. **Settings → Connectors.** Browse the directory, or choose **Add custom connector** and paste the remote MCP server URL.
2. **Authenticate** with OAuth. You sign in to the tool itself; Claude never sees your password.
3. **Enable it per conversation** from the "+" menu in the chat.
4. **Test with a small read** ("list my three most recent opportunities") to confirm it's live before you trust it with real work.

```
Add custom connector
  Name: [redacted]
  URL:
  Auth:  OAuth  (or a shared API key via request header)
```

Example: adding a custom (internal) connector.

GOTCHA · ENTERPRISE On Team/Enterprise, only an **Owner** can add a connector to the [redacted] seat. So bringing on a new tool is two steps: Owner adds it once, then everyone links their own account.

GOTCHA · NETWORK Claude reaches a remote MCP server from **Anthropic's cloud**, not from your laptop, even in Cowork. A server behind the VPN or a firewall won't connect unless Anthropic's IP ranges are allowlisted. Cloud SaaS (Salesforce, HubSpot, and the like) works out of the box; internal tools on the private network need IT to open the door.

TIP With **Enterprise-managed auth**, an Owner can authorize a connector once for the whole org and the team inherits access on first login. No per-person OAuth dance. Worth raising [redacted]

05 The Stratus stack at a glance

What each core connector is best for:

Salesforce

The deal system of record. Read pipeline, accounts, and opportunities; create and update records.

Microsoft 365

Outlook, Teams, calendar, SharePoint. Both the context ("what's happened on this account") and the delivery ("post this to the channel").

Call intelligence (Fireflies / Granola)

Meeting transcripts and recaps. Feed discovery straight into MEDDPICC scoring or a follow-up.

ZoomInfo

Firmographics and contacts. Enrichment for prospecting and battlecards *(read)*.

HubSpot

Marketing attribution and campaign membership.

Confluence

The GIKB knowledge base: runbooks, the ICP guide, territory model.

monday.com

The GME ticket system. Create and track work items.

Slack

Team comms and quick posts.

TIP The real power is **combining sources in one ask**. "Build a battlecard for this account" can pull firmographics from **ZoomInfo**, open deals from **Salesforce**, and campaign history from **HubSpot**, then hand you a single **artifact** you refine and share. One request, three systems, one deliverable.

END OF GUIDE *Pick one account this week and ask Claude to pull everything it can across your tools. Questions: Ben Marshall, RevOps.*