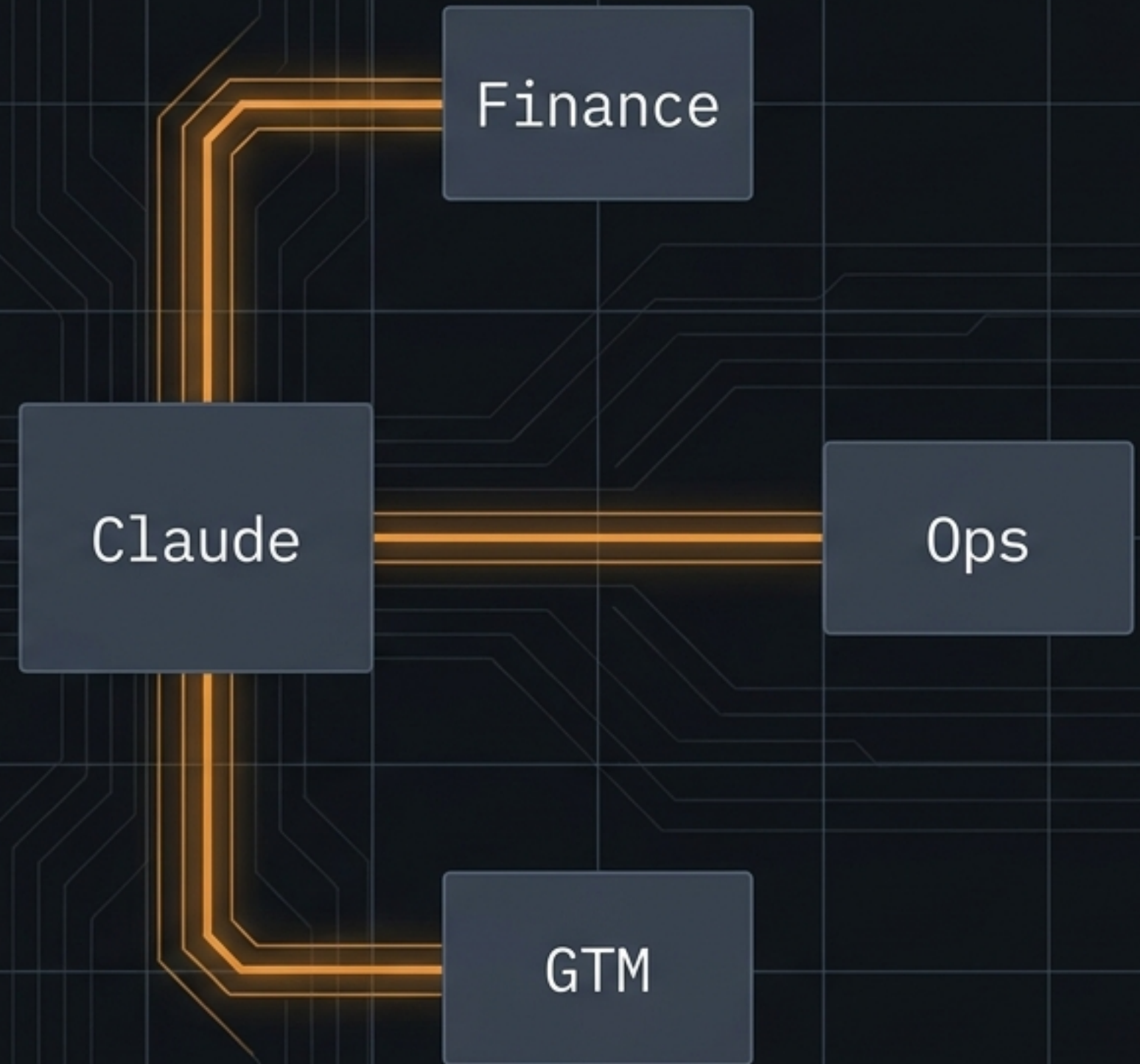


Agentic Infrastructure for the SMB

Operationalizing Claude for Small Business

Core Focus:

- Connectors
- Workflows
- Governance
- Deployment Frameworks



The gap isn't intelligence—it's integration

Enterprise Reality



Heavy custom engineering, long deployments.

SMB Reality



Isolated in the chat window, separated from system data.

The Baseline

Small businesses account for **44%** of U.S. GDP.

The Friction

50% of owners name data **security** as their top hesitation. Tools leave owners trapped in **manual data-entry**.

The Fix

Claude for Small Business acts as **plug-and-play connective tissue**, transforming chat into an **execution engine**.

The orchestration engine inside existing operations

Toggle-Install Connectors

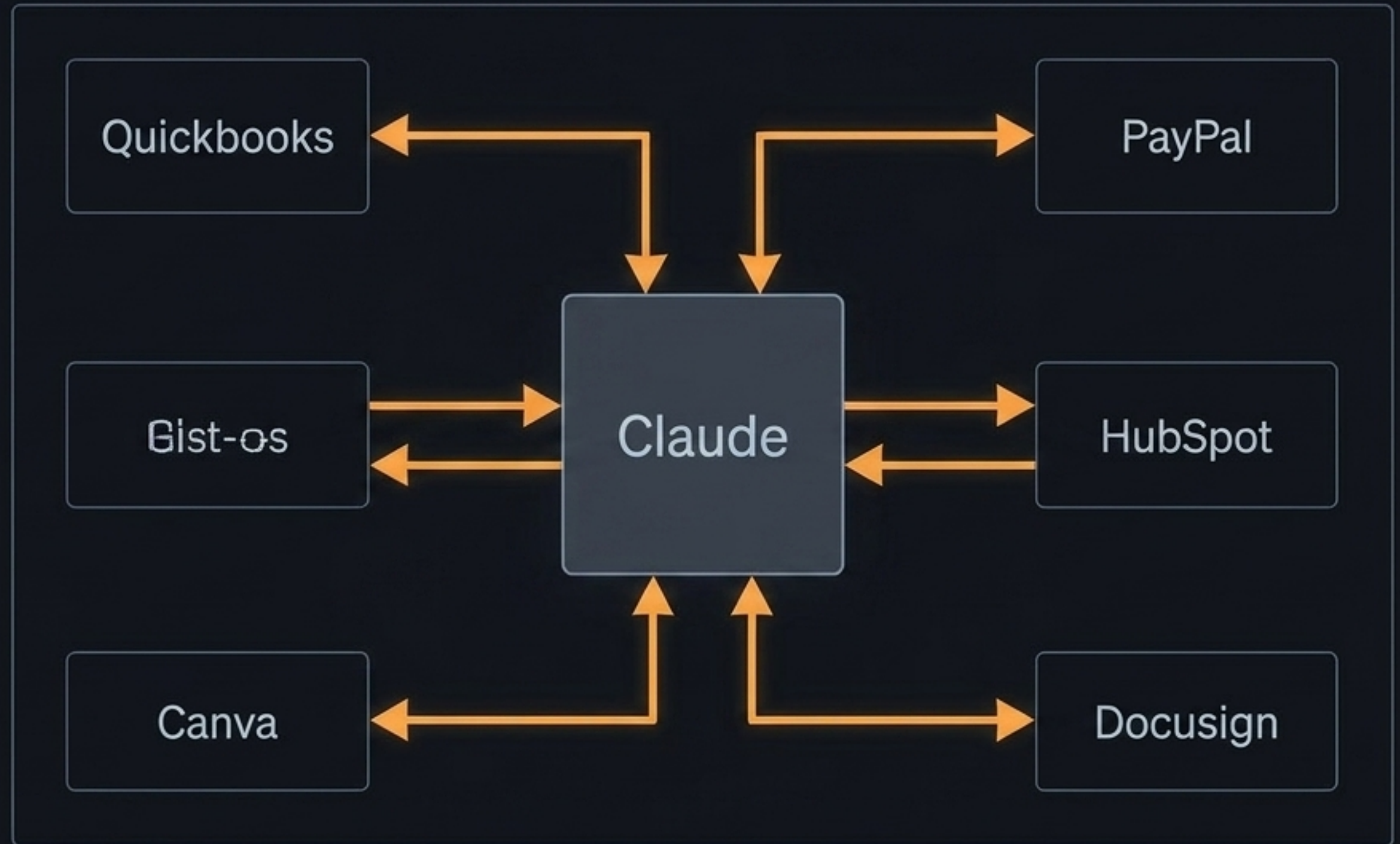
Seamless integration requiring zero custom code.

15 Agentic Workflows

Pre-configured multi-step processes across finance, sales, marketing, HR, and ops.

15 Repeatable Skills

Single-step execution for isolated, high-friction tasks.



Operational Philosophy: Claude does the work; humans approve before anything sends, posts, or pays.

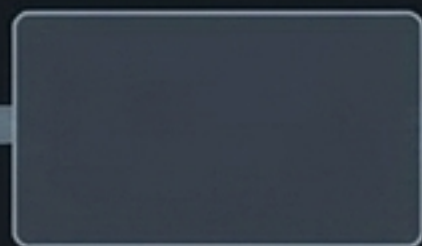
Standardized connector capability matrix

System	Primary Context	Read Capabilities	Write/Execute
Intuit QuickBooks	Live P&L, Cash Flow	Benchmarking, Statements, Import Status	Categorize and import transactions to General Ledger, Update profiles.
HubSpot CRM	CRM records, Engagement history	Campaign attribution, Ticket triage, Lifecycle tracking	Update deal stages, log calls, create tasks.
PayPal (Agentic Commerce)	Store Sync, Settlements	Transaction history, Invoices	Orchestrate fulfillment, manage disputes, secure checkout via Agent Ready.

System Note: All write actions feature native attribution, recording the Claude connector and the authorizing user directly in the system's Audit Log.

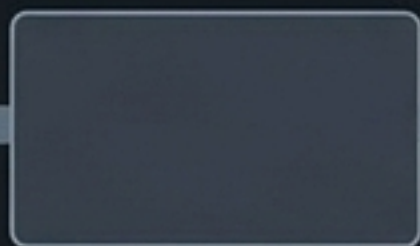
Automating the month-end financial close

[READ]



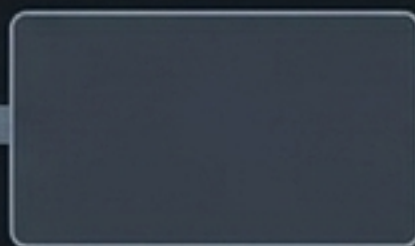
Settle QuickBooks cash position against incoming PayPal settlements.

[PROCESS]



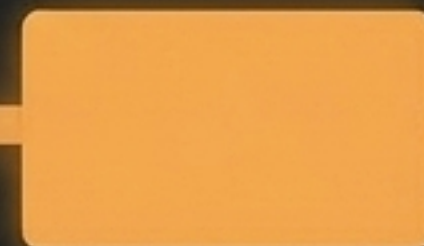
Reconcile books, build 30-day forecast, and flag mismatched settlements.

[WRITE]



Generate plain-English P&L and export a close packet.

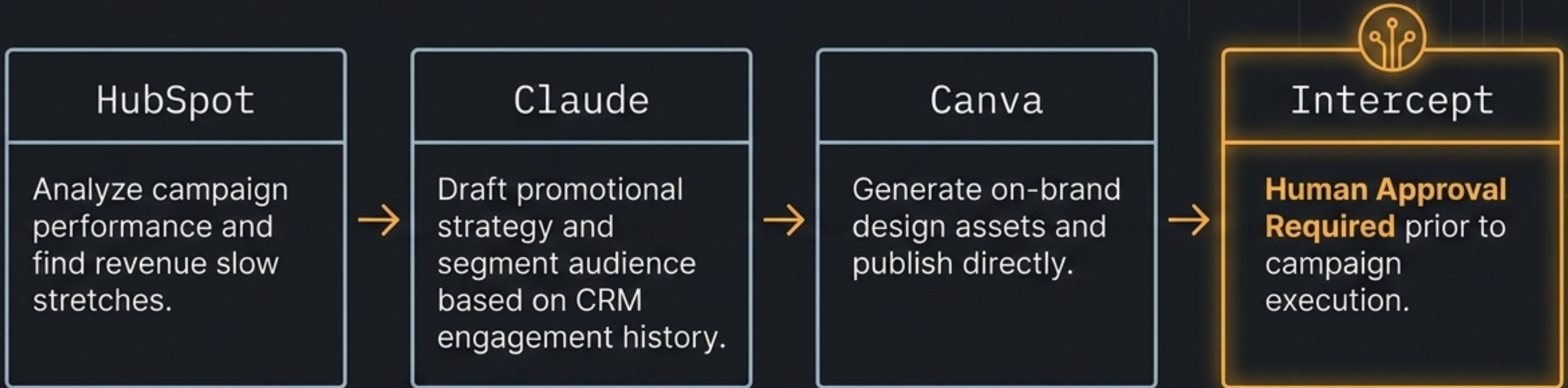
[INTERCEPT]



Human Approval Required before routing to the accountant.

Outcome: Frees operators from tedious clerical work and catches reconciliation errors autonomously.

Orchestrating cross-channel growth campaigns



Lead Triage Parallel Process:

Simultaneously summarizes CRM engagement history, identifies churn risks, and updates deal stages without manual data entry.

Enforcing strict human-in-the-loop governance



Inherited Permissions

Claude automatically respects existing Identity and Access Management (IAM). If an employee cannot see a record in HubSpot or Drive, Claude cannot see it.

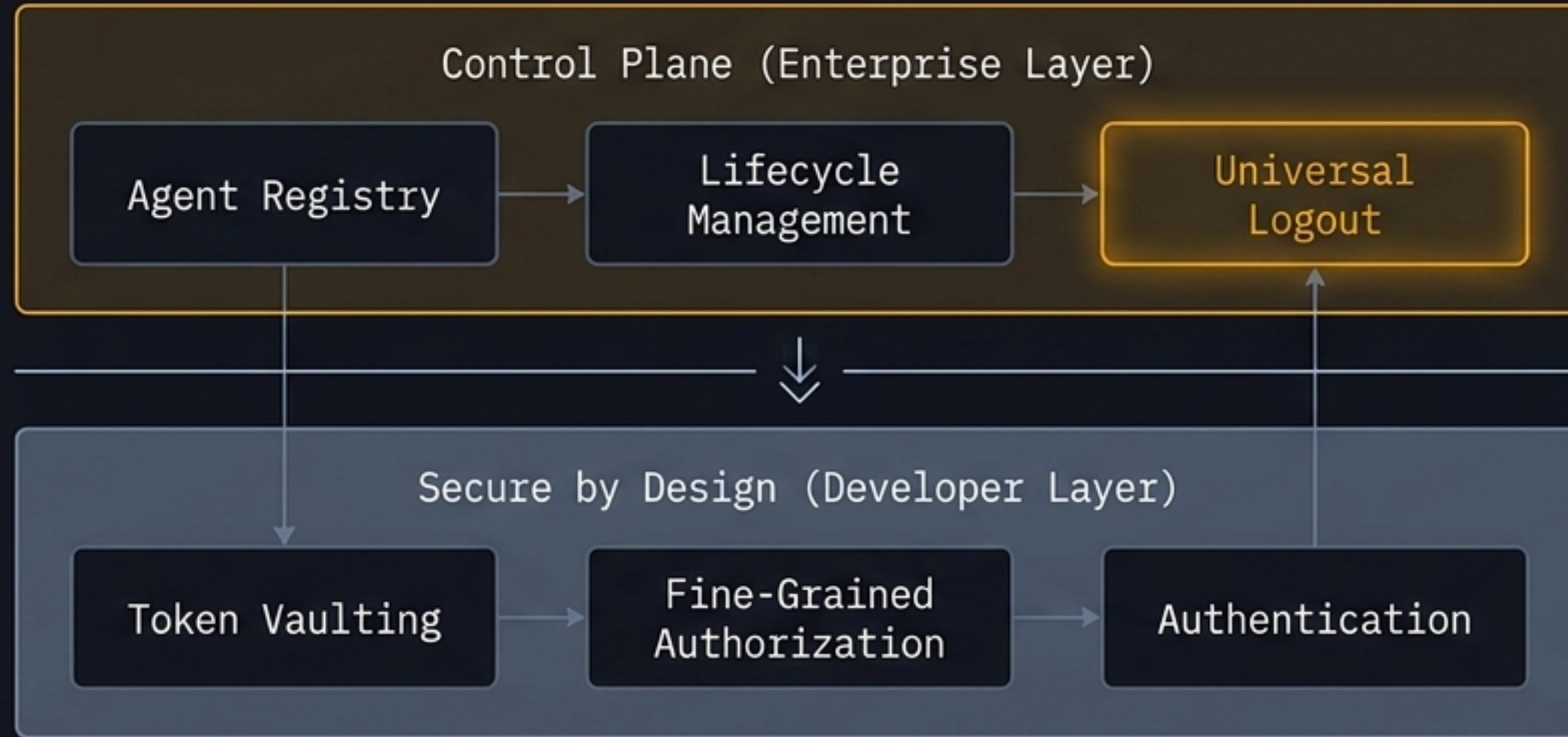
Asynchronous Execution

Default 'Needs Approval' states for all write-actions. Workflows pause safely until a human validates the output.

Data Privacy

Zero model training on proprietary SMB data by default on Team and Enterprise plans.

The dual-layer agentic security framework



Token Vaulting

OAuth access tokens are securely managed and refreshed automatically. Credentials never touch the agent's code or logs.

Universal Logout

Behavioral analytics instantly detect anomalies and can trigger an emergency kill switch across all integrated tools.

The deployment framework: The 47% hybrid reality



Establishing the operational baseline

1

Connect the Stack

Toggle on Quickbooks, HubSpot, and PayPal integrations within Claude Cowork.

2

Automate Friction

Start with isolated, high-friction tasks (invoice chasing, lead triage, P&L generation).

3

Enforce Governance

Maintain strict human-in-the-loop approvals for all edge-case and execution workflows.

[AI Fluency for Small Business]

Access the free, on-demand training course co-developed with PayPal, or join the 10-city live SMB Tour to secure a baseline of responsible AI adoption for your team.