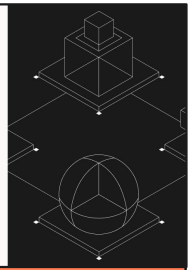
Claude x Carta Foundations
Set-up Guidance

Q4 2026

Upcoming Events

Join live sessions with startup experts, attend product education webinars, and connect with peers facing the same challenges as you.

carta · LEARNING LAB



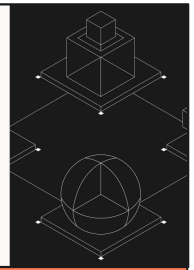
3. Preparing to Issue Equity

PART 3 OF 4

Thursday, Oct 22
11:30 AM - 12:30 PM PDT

Register →

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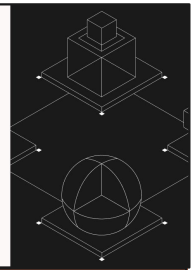
4. Corporate Governance

PART 4 OF 4

Thursday, Nov 5
10:00 AM - 11:00 AM PST

Register →

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1. Managing the Cap Table

PART 1 OF 4

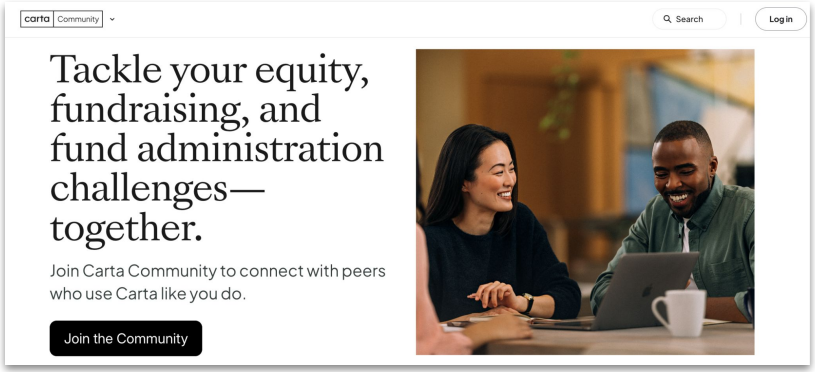
Thursday, Sep 24
12:30 PM - 01:30 PM PDT

Register →

Continue the conversation..

Collaborate with peers and industry experts while learning how to make Carta work for you:

- ➢ Learning Courses
- ➢ Customer chats
- ➢ Register for future **Learning Labs**






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Agenda

Topic

- Introductions + Settle in
- Claude Foundations
- Build your Cap Table Home
- Equity Queries + Reporting Artifact
- Equity Issuance Demo
- Wrap up + Q&A

How to get help during the session

Type "**stuck**"or raise your hand 🖐 in the chat.

The host will move you into a one-on-one help room.
Leave and rejoin the main session any time.

Use the Zoom desktop app, not the browser, so help rooms work.

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Meet the speakers



Brianne Villamor
Customer Program Manager



Ashley Zhou
Product Team



Eden Renee
Product Team



Webb Allen
Product Team


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Where can this save you time?

GRANT CYCLES

Repeat work, done once

Describe who gets what or upload your spreadsheet directly to Claude

AUDIT PREP

Answers with sources

Ask Claude to cite the source and as-of date for every figure

MANY COMPANIES

Same skills everywhere

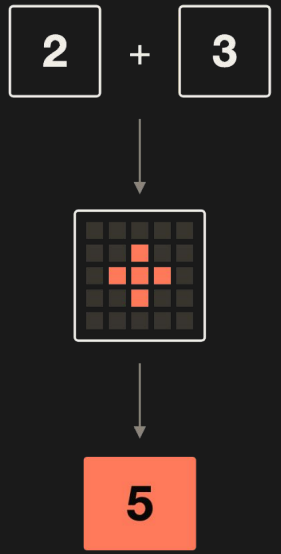
Run the same request across each cap table you manage

Understanding Claude Tools

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Arithmetic vs Word Calculator

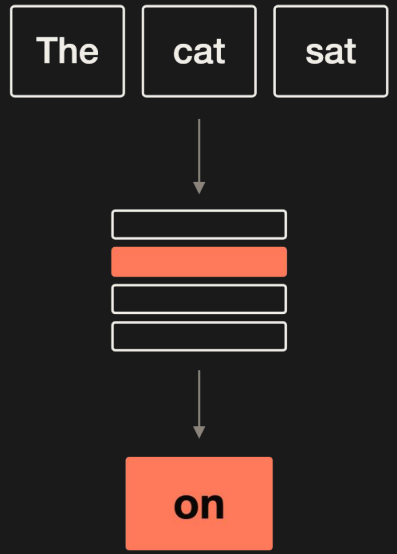
ARITHMETIC CALCULATOR



Two numbers in → one number out

Always exactly 5. Every time.

WORD CALCULATOR



Three words in → predicts the most likely next word

Probability, not arithmetic.

Claude Tools
Understanding the difference

YES - You Need Desktop!

Claude
(Chat & Cowork)

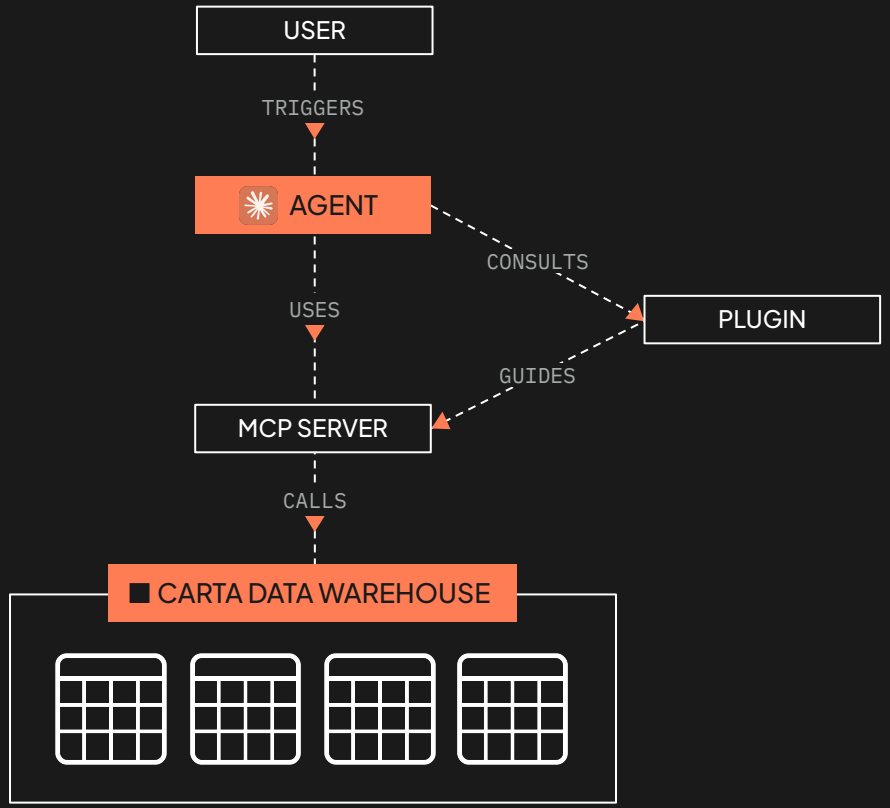
Autonomous AI that independently executes multi-step workflows. More user-friendly and communicative

Claude Code

Write scripts, automate tasks, build coding projects. Created for engineers and advanced AI builders

What is an Agent, MCP, plugin, skill, tool?

How does an AI agent work?



Agents: At their essence, Agents consist of two things: an LLM and a trigger. You can add context, skills, and tools to customize agents for specific use cases

Plugins: Make agents like Claude reliable by guiding them toward the right data source and more powerful with skills and artifacts out of the box

MCPs/Connectors: Superpowered data pipelines, giving Claude access to the broadest possible dataset on demand

What is a skill?

■ Skill

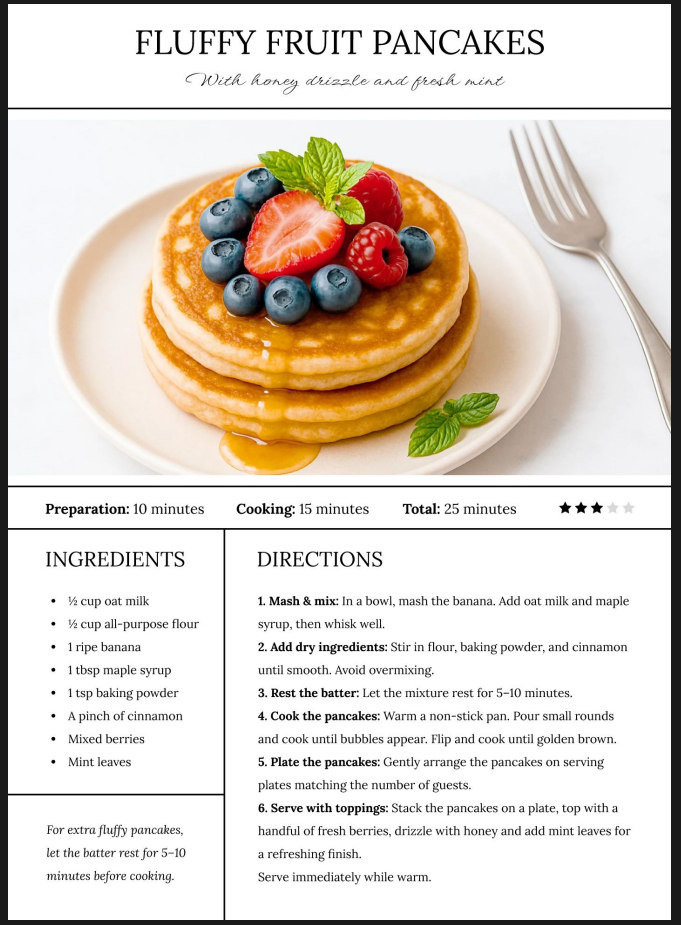
A saved set of instructions that combines multiple steps and tools into a reusable template. It includes folders of markdown files, code scripts, and tool calls, and is often bundled with other skills in a plugin

Skills teach Claude how to complete specific tasks in a repeatable way.

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

A Carta skill has been built with:

- Validated Carta data
- Permissions
- Accurate calculations
- Testing



FLUFFY FRUIT PANCAKES

With honey drizzle and fresh mint

Preparation: 10 minutes **Cooking:** 15 minutes **Total:** 25 minutes ★★★☆☆

INGREDIENTS

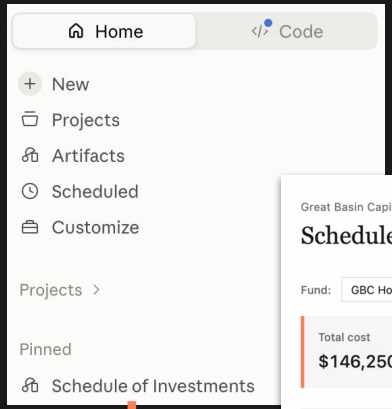
- ½ cup oat milk
- ½ cup all-purpose flour
- 1 ripe banana
- 1 tbsp maple syrup
- 1 tsp baking powder
- A pinch of cinnamon
- Mixed berries
- Mint leaves

For extra fluffy pancakes, let the batter rest for 5–10 minutes before cooking.

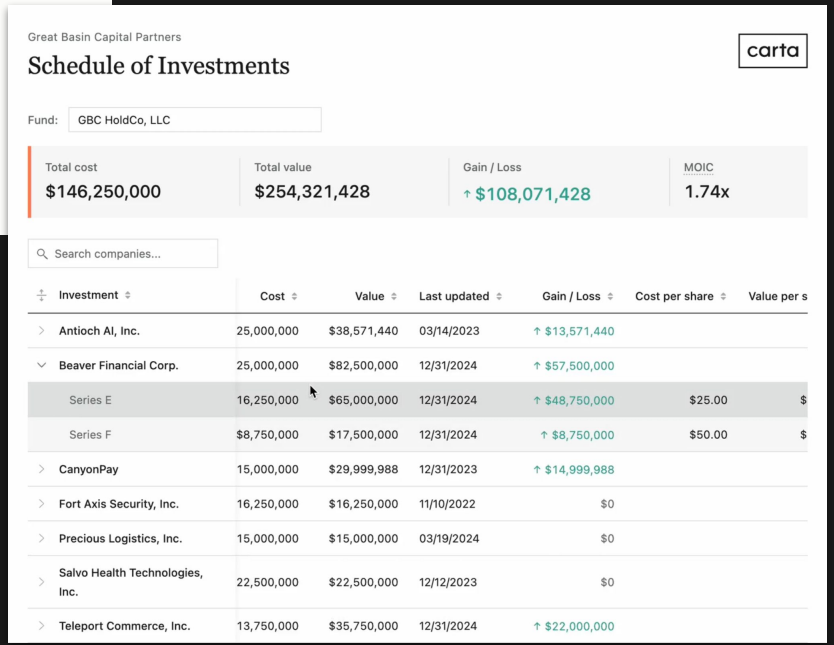
DIRECTIONS

1. Mash & mix: In a bowl, mash the banana. Add oat milk and maple syrup, then whisk well.
2. Add dry ingredients: Stir in flour, baking powder, and cinnamon until smooth. Avoid overmixing.
3. Rest the batter: Let the mixture rest for 5–10 minutes.
4. Cook the pancakes: Warm a non-stick pan. Pour small rounds and cook until bubbles appear. Flip and cook until golden brown.
5. Plate the pancakes: Gently arrange the pancakes on serving plates matching the number of guests.
6. Serve with toppings: Stack the pancakes on a plate, top with a handful of fresh berries, drizzle with honey and add mint leaves for a refreshing finish.
Serve immediately while warm.

What is a live artifact?



Pin artifacts for easy access!



■ Live Artifacts

Interactive views generated by Claude: dashboards, reports, tear sheets. Instead of exporting a static PDF or screenshot, you get a rich, visual output you can interact with and easily edit.

Each artifact is a structured data table with a defined use case, and should be built to quickly retrieve and analyze data you use regularly.

They are faster, more reliable, and cheaper to update than repeatedly using a skill

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

What the Carta cap table plugin can do

LOOK UP

Ask in plain language

409A history, unvested shares, a full picture of one employee's equity

BUILD

Build a cap table home or other reporting artifacts

An artifact you build once. Create your view and refresh any time.

ISSUE

Draft and issue directly from Claude

`/carta-issuance` uses the same defaults and validation as Carta

Setup and Permissions

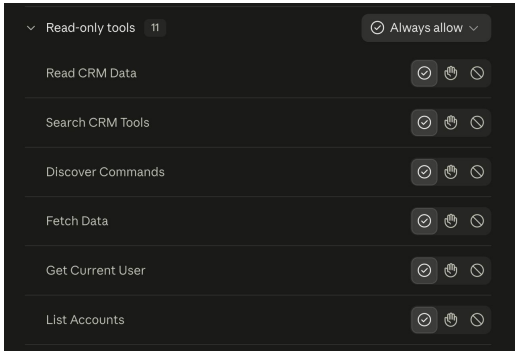
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Connector permissions

ALWAYS ALLOW

READ-ONLY TOOLS:

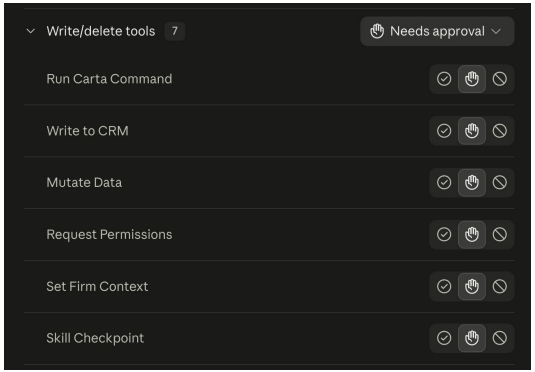
Lookups run without stopping to ask



NEEDS APPROVAL

ANYTHING THAT WRITES:

You see it before it happens



BLOCKED

OFF LIMITS:

Claude cannot use the tool

Prompting + Claude Customization

Claude prompt basics

■ 4 Requirements for a Great Prompt

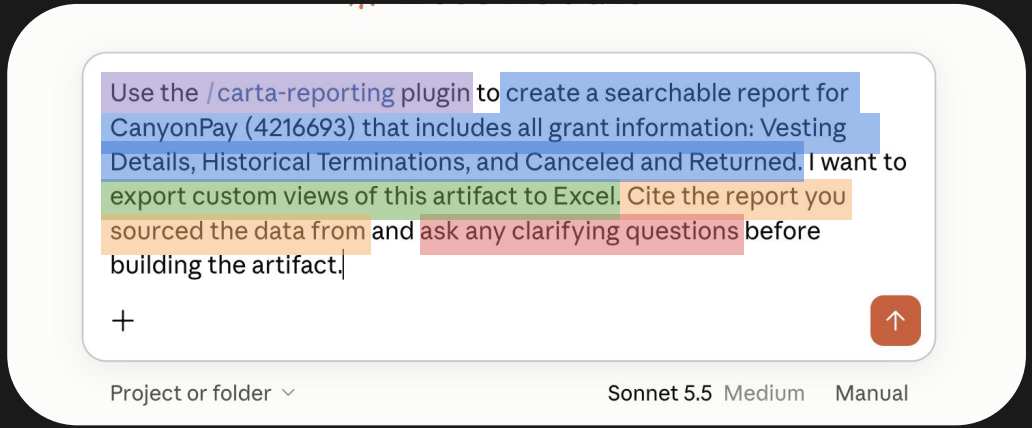
Context: What Claude needs to know: source documents, connectors/plugins, existing skills

Goal: What output you want from Claude: fund performance by LP, Manco budget, portco waterfall

Format: How you want outputs to be presented: branded PDF, spreadsheet, artifact structure

Constraints: What guidelines to follow: citing sources, context to ignore, actions it can't take

Important: Tell Claude to **ask you clarifying questions** along the way.



Let’s try it live, together!

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Build your Cap Table Home (artifact)

1

Type /carta-captable-home-build

Or ask Claude to build you a cap table home, include the company name* and hit enter.

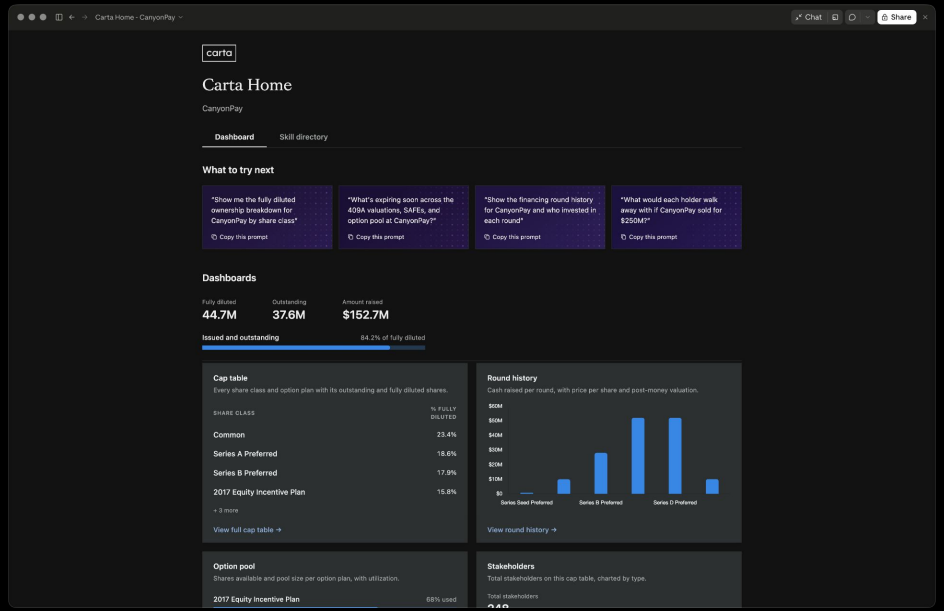
**if you have access to more than one company*

2

Your dashboard renders and pins in the sidebar.

This is an artifact: build it once, refresh it later. Use it as your launchpad and menu of skills.

Open a new chat for each question.



Ask in a new chat

VALUATIONS	UNVESTED	FULL PICTURE
What's my 409A valuation history?	Show me unvested shares for [Employee].	Show me a full picture of [Employee]'s equity: holdings, what will vest or forfeit, or what was canceled.

Reports can become artifacts

1

Ask for a report, not a single answer

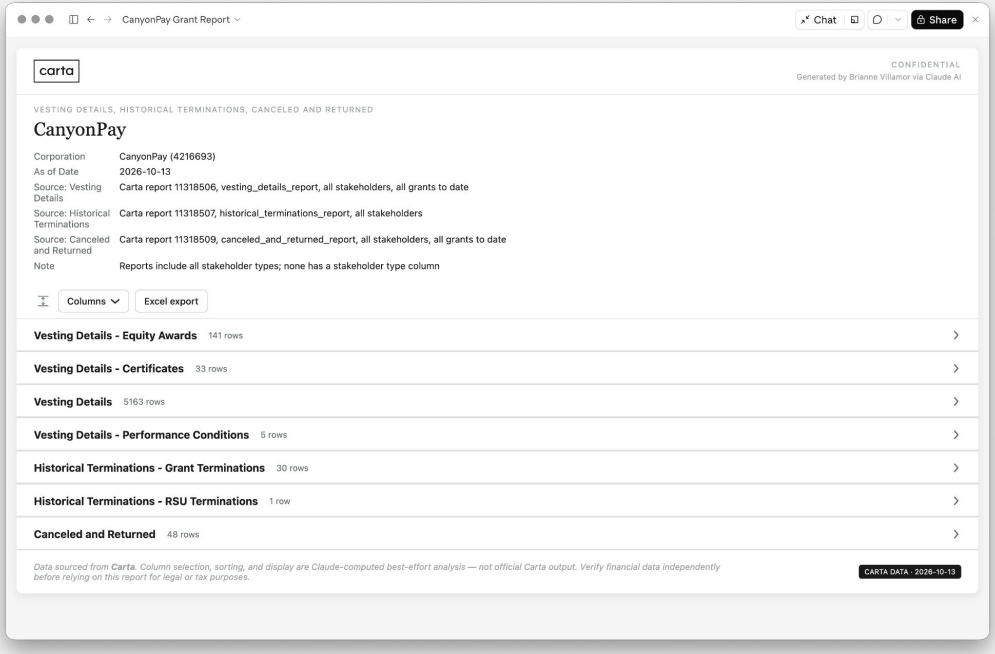
Example: Create a report using /carta-reporting that includes all vested and unvested equity awards currently on the cap table. I need this to be able to export to excel.

2

Keep it if you will revisit it.

These will refresh each time you interact with them.

Leave it if it was a one-off.



Equity issuance demo

1

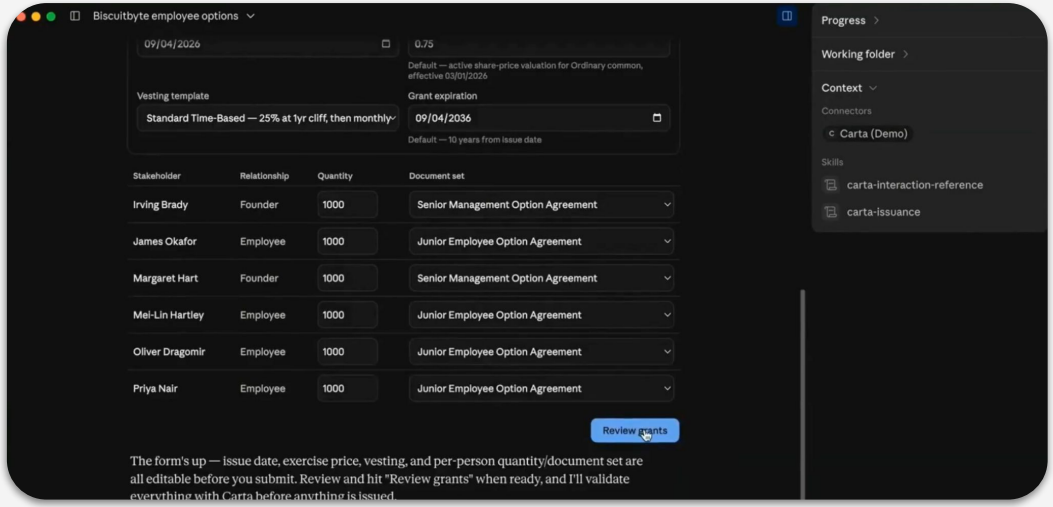
Type /carta-issuance or describe the grant.

Example: Issue 1,000 ISOs to [Employee 1].

2

Review the draft before anything is created.

Vesting, exercise price and/or items like board approval pre-fill from your company data.



Wrap up: 5 principles to leave today with

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1. **Claude is a word calculator, don't ask it to do math**

   Claude is a new computer chip, using words as the input instead of numbers. Use Claude for judgment, summarization, and reasoning, and ask Claude to write scripts using traditional code for tasks requiring predictable data parsing or validation

2. **Give Claude the context and goal, not the steps in between**

   Don't write step-by-step instructions and expect Claude to follow them in order. Instead, allow agents to find their own solution, not the solution that works best for humans. Define your objective and let Claude find the path.

3. **Always have Claude site the sources**

   This will help save you time and give you confidence in the answers Claude is providing for you. Pull the data first, then reason on it.

4. **Use artifacts to make pulling data through Claude faster, cheaper, and more reliable**

   The most consistent question we get from clients is how to guarantee Claude provides accurate answers to user questions. Artifacts are one of the most effective solutions - create an artifact, check the data, know it will be right next time

5. **If outputs miss the mark, ask Claude why**

   Moving to AI-driven processes means your first step to diagnose errors is asking Claude what it did, why, and why it got the answer wrong. Often this single question is enough to uncover or even fix the error.


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