

FROM ZERO TO PRODUCTIVE



Your Absolute Beginner's
Guide to Claude Cowork

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THE ULTIMATE GUIDE TO

Claude Cowork

by Fabian Markl

From Zero to Productive: The Complete Beginner's Handbook

Setup • Features • Plugins • Connectors • Automation Prompts

10 Premium Copy-and-Paste Automation Prompts Included

**>> Get 51 ready-to-use AI automation templates
(Claude Cowork Blueprints added soon!) <<**

Table of Contents

Chapter 1: What Is Claude Cowork?	3
1.1 Overview	3
1.2 Why Anthropic Built Cowork	3
1.3 How Cowork Is Different from Chat and Claude Code	3
1.4 The Impact	4
Chapter 2: Requirements and Pricing	5
2.1 System Requirements	5
2.2 Pricing Plans	5
Chapter 3: Complete Setup Guide (Step by Step)	6
Step 1: Download the Claude Desktop App	6
Step 2: Sign In and Subscribe	6
Step 3: Switch to Cowork Mode	6
Step 4: Grant Folder Access	6
Step 5: Run Your First Task	6
Step 6: Set Up Context Files (The 30-Minute Setup That Changes Everything)	7
File 1: about-me.md	7
File 2: preferences.md	7
File 3: current-projects.md	7
Step 7: Set Up Global and Folder Instructions	8
Chapter 4: Core Features and Capabilities	9
4.1 Autonomous Multi-Step Task Execution	9
4.2 Direct Local File Access	9
4.3 Professional Document Creation	9
4.4 Scheduled and Recurring Tasks	9
4.5 Sub-Agent Coordination	10
4.6 Mobile Access (Pro and Max)	10
4.7 Cross-Application Workflows	10
Chapter 5: Plugins — Turning Claude Into a Specialist	11
5.1 What Are Plugins?	11
5.2 How to Install Plugins	11
5.3 The 11 Official Plugins by Anthropic	11
5.4 Creating Custom Plugins	12
Chapter 6: Connectors — Linking Claude to Your Tools	13
6.1 What Are Connectors?	13
6.2 Available Connectors	13
6.3 How to Set Up a Connector	13
Chapter 7: What You Can Do With Cowork (Key Use Cases)	14
7.1 File Organization and Management	14
7.2 Expense Reports from Receipt Screenshots	14

7.3 Research Synthesis and Report Generation	14
7.4 Presentation Creation	14
7.5 Email and Communication Drafting	14
7.6 Data Analysis	14
7.7 Contract and Legal Document Review	14
Chapter 8: Best Practices and Power-User Tips	16
8.1 Be Specific About Outputs	16
8.2 Batch Related Tasks	16
8.3 Use Chat for Simple Stuff	16
8.4 Monitor Your Usage	16
8.5 Keep Context Files Updated	16
8.6 Start Safe, Expand Gradually	16
Chapter 9: Known Limitations	17
Chapter 10: 10 Premium Automation Prompts (Copy and Paste)	18
Prompt 1: Weekly Email Digest and Priority Sorter	18
Prompt 2: Meeting Preparation Package	18
Prompt 3: Expense Report Generator	19
Prompt 4: Competitive Intelligence Report	19
Prompt 5: Daily Standup Report Compiler	20
Prompt 6: Content Calendar and Social Media Drafts	20
Prompt 7: Invoice Processor and Financial Tracker	21
Prompt 8: Job Application Package Builder	21
Prompt 9: Project Status Report Generator	22
Prompt 10: End-of-Week Review and Next Week Planner	22
Chapter 11: Using Cowork Safely	24
Chapter 12: Quick-Start Cheat Sheet	25

Chapter 1: What Is Claude Cowork?

1.1 Overview

Claude Cowork is Anthropic’s desktop AI agent that transforms Claude from a conversational chatbot into an autonomous digital coworker. Released on January 12, 2026 as a research preview, Cowork lives inside the Claude Desktop app and can directly read, edit, and create files on your computer. You describe what you want done, Claude makes a plan, you approve it, and Claude executes it — for minutes or even hours — while you step away and do other things.

Unlike standard Claude chat where you have a back-and-forth conversation, Cowork operates more like leaving instructions for a colleague. You delegate a task, and you come back to finished work: formatted documents, organized files, spreadsheets with working formulas, PowerPoint presentations, synthesized research reports, and more. Everything is saved directly to your local file system — no copy-pasting from a chat window.

1.2 Why Anthropic Built Cowork

The story of Cowork starts with Claude Code, Anthropic’s developer tool that launched in 2024 and quickly became one of the company’s most-used products. Claude Code gives developers the ability to read codebases, write files, and execute commands from a terminal. It became so capable at general file operations that non-developers started using it for everyday work: sorting files, compiling research, drafting documents.

Anthropic saw this pattern and recognized an opportunity to bring the same powerful capabilities to everyone — without requiring anyone to open a terminal. The result was Cowork, built on the same agentic architecture as Claude Code but wrapped in the familiar Claude Desktop interface. In a remarkable demonstration of its own AI capabilities, Anthropic’s team built Cowork using Claude Code itself in approximately 10 days.

1.3 How Cowork Is Different from Chat and Claude Code

Feature	Claude Chat	Claude Cowork	Claude Code
Interface	Browser / mobile	Desktop app	Terminal / IDE
Mode	Conversational	Task delegation	Developer commands
File access	Upload only	Local folder access	Full filesystem
Output	Text in chat	Files saved to disk	Code and files
Autonomy	Prompt-by-prompt	Multi-step autonomous	Multi-step autonomous
Best for	Questions, brainstorming	Knowledge work	Software development
Audience	Everyone	Knowledge workers	Developers

The simple framework: Chat is for thinking, Cowork is for doing, Claude Code is for building.

1.4 The Impact

The launch of Cowork sent shockwaves through the technology industry. Enterprise software stocks experienced a significant selloff as investors realized that AI could now autonomously complete work that had previously required specialized SaaS tools. Within weeks, Microsoft partnered with Anthropic to bring a cloud-based version called Copilot Cowork into the Microsoft 365 ecosystem, signaling the scale of the disruption.

Chapter 2: Requirements and Pricing

2.1 System Requirements

- macOS (primary, smoothest experience) or Windows x64
- Claude Desktop app (latest version) — free download from claude.com/download
- Active internet connection (required while Cowork is working)
- A paid Claude subscription (Pro, Max, Team, or Enterprise)
- Computer must stay awake with Claude Desktop open for tasks to continue

Important Note

Windows ARM64 is not currently supported. Cowork is not available on web or mobile (though Pro and Max users can send tasks from the mobile app to a desktop running Cowork).

2.2 Pricing Plans

Plan	Monthly Cost	Cowork Access	Usage Level
Free	\$0	No	Basic chat only
Pro	\$20/month	Yes	Standard (hits limits faster)
Max 5x	\$100/month	Yes	5x Pro usage (~225+ msgs/5hr)
Max 20x	\$200/month	Yes	20x Pro usage (~900+ msgs/5hr)
Team	\$125/user/mo	Yes	Premium Seat required
Enterprise	Custom	Yes	Full admin controls

Pro Tip

Cowork tasks consume significantly more tokens than regular chat because they involve multi-step autonomous execution. If you plan to use Cowork frequently, the Max 5x plan (\$100/month) offers the best balance of capacity and value. Usage limits reset on rolling 5-hour windows, not daily.

Chapter 3: Complete Setup Guide (Step by Step)

Step 1: Download the Claude Desktop App

1. Visit claude.com/download in your web browser.
2. Select the version for your operating system (macOS or Windows x64).
3. On Mac: Open the downloaded file and drag Claude to your Applications folder. On Windows: Run the installer and follow the prompts.
4. Open Claude from your Applications folder (Mac) or Start menu (Windows).

Step 2: Sign In and Subscribe

5. Sign in with your existing Claude account, or create a new one.
6. If you are on the Free plan, you will need to upgrade to at least the Pro plan (\$20/month) to access Cowork. Go to Settings to upgrade.
7. Once signed in with a paid plan, you will see three tabs at the top of the Claude Desktop window: Chat, Cowork, and Code.

Step 3: Switch to Cowork Mode

8. Click the “Cowork” tab at the top of the Claude Desktop window.
9. You are now in Cowork mode. The interface looks similar to Chat, but the behavior is fundamentally different.

Step 4: Grant Folder Access

10. Click “Work in a folder” or the equivalent prompt in the Cowork interface.
11. Select the folder on your computer that you want Claude to work with.
12. Start with a safe, dedicated folder — for example, create a new folder called “Cowork-Projects” on your Desktop. Do not point Claude at your entire Documents folder on day one.

Security Note

Cowork runs code in an isolated virtual machine (VM) environment, but Claude does have the ability to make real changes to files in the folders you grant access to. Always review Claude’s planned actions before allowing it to proceed, especially with sensitive files. Anthropic does not train on your files.

Step 5: Run Your First Task

Type a clear, specific description of what you want Claude to accomplish. Here’s a perfect beginner task:

Your First Prompt

Organize all files in this folder into subfolders by file type (Documents, Images, Spreadsheets, Other). Rename files with a YYYY-MM-DD prefix where dates are identifiable. Create a log file called ORGANIZATION-LOG.md showing what you did.

13. Claude will analyze your request and present a plan.
14. Review the plan and approve it (or ask Claude to adjust).
15. Claude executes the work autonomously. You can watch its progress or step away.
16. Come back to finished work saved directly in your folder.

Step 6: Set Up Context Files (The 30-Minute Setup That Changes Everything)

This is the single most important setup step. Without context files, every Cowork session starts from scratch — Claude does not know who you are, what you do, or how you like things done. Context files fix this permanently.

Create three Markdown files in your working folder:

File 1: about-me.md

about-me.md

```
# About MeName: [Your Name]Role: [Your Job Title]Company: [Company Name]Industry: [Your Industry]## Current Priorities- [Priority 1]- [Priority 2]- [Priority 3]## Communication Style- I prefer [formal/casual] tone- Keep documents in [format preferences]- Always use [specific terminology or conventions]
```

File 2: preferences.md

preferences.md

```
# Work Preferences## Document Formatting- Use [font/style] for all documents- Include headers and page numbers- Save spreadsheets as .xlsx with formulas## File Naming Convention- Use: YYYY-MM-DD_descriptive-name.ext- All lowercase with hyphens## Output Quality- Always include executive summaries- Data should have sources cited- Presentations should be 10-15 slides max
```

File 3: current-projects.md

current-projects.md

```
# Active Projects## Project A: [Name]- Status: [In Progress/Planning]-  
Deadline: [Date]- Key stakeholders: [Names]- Notes: [Relevant context]##  
Project B: [Name]- Status: [In Progress/Planning]- Deadline: [Date]- Key  
stakeholders: [Names]- Notes: [Relevant context]
```

Claude reads these files automatically at the start of every session. Think of them as an onboarding document for a new employee who reads it every single morning before starting work and never forgets a word.

Step 7: Set Up Global and Folder Instructions

Beyond context files, Cowork now supports two levels of persistent instructions:

- **Global Instructions:** Apply across every Cowork session, regardless of folder. Set your preferred tone, format, or background about your role.
- **Folder-Specific Instructions:** Kick in only when you're working in a particular folder. Great for project-specific context.

You can update either type of instruction directly from within a Cowork chat session.

Chapter 4: Core Features and Capabilities

4.1 Autonomous Multi-Step Task Execution

Cowork's core power is its ability to break complex requests into subtasks, coordinate parallel workstreams, and deliver finished output. When you give Cowork a task, it analyzes your request, creates a plan, breaks complex work into subtasks when needed, executes work in a virtual machine environment, coordinates multiple workstreams in parallel if appropriate, and delivers finished outputs directly to your file system.

4.2 Direct Local File Access

Unlike regular Claude chat where you upload files one at a time, Cowork can directly read from and write to your local files without manual uploads or downloads. It can process hundreds of files in a single session, read file contents (including images) to understand what they actually contain, create new files with proper formatting, edit existing files in place, and organize entire folder structures.

4.3 Professional Document Creation

Cowork produces actual, usable files — not just text you need to copy and paste. It can generate Excel spreadsheets with working formulas and formatting, PowerPoint presentations with proper slides and layouts, Word documents with headers, footers, and formatting, Markdown files, PDFs, and other standard formats. These files land directly in your folder, ready to open, edit, and send.

4.4 Scheduled and Recurring Tasks

One of Cowork's most powerful features is the ability to create tasks that run automatically on a schedule you define. To create a scheduled task, type `/schedule` in any Cowork session. Claude will walk you through setting up the cadence and details.

Common scheduled tasks include:

- Daily briefings: Summarize Slack messages, emails, or calendar events from the past 24 hours
- Weekly reports: Compile data from Google Drive or spreadsheets into a formatted summary
- Recurring research: Track competitors, industry news, or specific topics on a regular basis
- File organization: Periodically sort, clean up, or process files in a designated folder
- Team updates: Generate status reports or standup summaries from project management tools

Requirement

Scheduled tasks only run while your computer is awake and the Claude Desktop app is open. If your machine sleeps or the app closes, active tasks will pause.

4.5 Sub-Agent Coordination

For complex tasks, Cowork can spin up multiple sub-agents that work in parallel. For example, if you ask Cowork to research five competitors and compile a report, it might create five separate sub-agents — one for each competitor — that research simultaneously, then coordinate the results into a single deliverable. This dramatically reduces the time needed for multi-faceted tasks.

4.6 Mobile Access (Pro and Max)

Pro and Max users can message Claude from the mobile app while their desktop stays active. This means you can assign a task from your phone, and Claude will execute it on your desktop using your local files and connectors. You just do not have to be sitting in front of your computer.

4.7 Cross-Application Workflows

Cowork can now pass context seamlessly between Excel and PowerPoint, including across multiple files, without requiring users to restart when switching applications. This means an end-to-end workflow — from performing research, to updating a model in Excel, to building the presentation deck — can happen in a single session.

Chapter 5: Plugins — Turning Claude Into a Specialist

5.1 What Are Plugins?

Plugins customize how Claude works for your role, team, and company. Each plugin bundles skills (domain knowledge that fires automatically), slash commands (explicit actions you invoke with /), MCP connectors (connections to external tools), and sub-agents into a single installable package. Plugins turn Claude from a general assistant into a specialized colleague who knows your tools, processes, and terminology.

5.2 How to Install Plugins

17. Open the Claude Desktop app and switch to the “Cowork” tab.
18. Click the “Customize” menu in the left sidebar.
19. Click “Browse plugins” to see all available options.
20. Click “Install” on your chosen plugin.
21. After installation, type “/” or click the “+” button to see available skills and commands.

5.3 The 11 Official Plugins by Anthropic

Plugin	Best For	Key Capabilities
Sales	Sales teams, account executives	Call prep, pipeline analysis, CRM integration
Legal	Lawyers, compliance teams	Contract review, clause analysis, risk flagging
Financial Analysis	Finance professionals	DCF models, comp analysis, 3-statement financials
Marketing	Marketers, content teams	Campaign planning, copy creation, analytics
Support	Customer support teams	Ticket triage, response drafting, escalation
Product	Product managers	PRD writing, roadmap planning, user research
Data Analysis	Data analysts	SQL queries, visualization, data warehouse access
Engineering	Engineering teams	Code review, documentation, sprint planning
HR	People operations	Offer letters, onboarding plans, performance reviews
Design	Design teams	Critique frameworks, UX copy, accessibility audits

Operations	Operations teams	Process optimization, reporting, workflow automation
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Additional domain-specific plugins have been released for Investment Banking, Equity Research, Private Equity, Wealth Management, and Life Sciences — each with specialized connectors to industry data platforms.

5.4 Creating Custom Plugins

Cowork includes Plugin Create, a built-in plugin that walks you through building custom plugins from scratch. You can also start from any Anthropic-built template and modify it. For enterprises, administrators can build private plugin marketplaces to distribute company-specific plugins across the organization.

Chapter 6: Connectors — Linking Claude to Your Tools

6.1 What Are Connectors?

Connectors use Anthropic's Model Context Protocol (MCP) to link Claude directly to the external tools and services your organization already uses. When a connector is active, Claude can read from and write to that service in real time, bringing live context into your workflows without copy-pasting between apps.

6.2 Available Connectors

As of March 2026, Claude Cowork supports connectors for:

- **Productivity:** Google Drive, Google Calendar, Gmail, Slack, Notion, Asana, Linear, Jira, Monday, ClickUp, Microsoft 365
- **Sales and CRM:** Salesforce, HubSpot, Pipedrive, Apollo, Clay, Outreach, Common Room
- **Finance and Data:** FactSet, MSCI, Daloopa, Morningstar, S&P Global, Moody's, PitchBook, LSEG, Chronograph
- **Legal and Docs:** DocuSign, LegalZoom, Harvey, WordPress, Egnyte
- **Development:** GitHub (private repos as plugin sources)
- **Design and Science:** BioRender, Benchling, Figma, SimilarWeb

6.3 How to Set Up a Connector

22. Open Claude Desktop and go to Settings.
23. Navigate to the Connector Directory.
24. Find the service you want to connect (e.g., Google Drive).
25. Click "Connect" and follow the authorization flow (usually OAuth sign-in).
26. Once authorized, the connector is active and Claude can access that service in Cowork sessions.
27. Admins can bundle connectors into plugins for team-wide deployment.

Chapter 7: What You Can Do With Cowork (Key Use Cases)

7.1 File Organization and Management

Cowork's most immediately impressive capability is content-aware file organization. Regular file organizers look at filenames. Cowork looks at the actual contents of each file. A screenshot named IMG_4521.png might actually be a receipt from a coffee supplier — Cowork can identify this and file it correctly. Users have organized 300+ files in minutes, transforming years of Downloads folder chaos into a coherent filing system.

7.2 Expense Reports from Receipt Screenshots

Dump 40 receipt screenshots into a folder. Tell Cowork to extract the date, vendor, category, and amount from each image and compile them into a formatted Excel spreadsheet with a totals row. Come back to a finished expense report.

7.3 Research Synthesis and Report Generation

Point Cowork at a folder full of PDFs, articles, and scattered notes. Ask for a comprehensive research report with executive summary, key findings, competitive analysis, and recommendations. Cowork reads every document, synthesizes the information, and produces a polished report saved to your folder.

7.4 Presentation Creation

Give Cowork your raw notes, data, or a brief, and ask for a PowerPoint presentation. It creates actual .pptx files with slides, layouts, and formatting. Combined with the cross-app workflow, you can go from raw data in Excel to a finished presentation deck in a single Cowork session.

7.5 Email and Communication Drafting

With Gmail and Slack connectors active, Cowork can draft emails, prepare meeting agendas from calendar context, summarize message threads, and compose professional communications — all grounded in real-time context from your actual inbox and channels.

7.6 Data Analysis

Cowork can read CSV and Excel files, perform analysis, create charts, and generate formatted reports. With the Data Analysis plugin and connectors to data warehouses like Snowflake or BigQuery, it can run queries, analyze results, and produce visualizations.

7.7 Contract and Legal Document Review

With the Legal plugin, upload a contract PDF and use /review-contract. Claude highlights acceptable clauses (green), risky ones (yellow), and critical ones (red) with specific modification suggestions based on your configured playbook.

Chapter 8: Best Practices and Power-User Tips

8.1 Be Specific About Outputs

Tell Claude exactly what format you want: Excel with specific columns, PowerPoint with particular sections, documents with specific structure. The more precise you are about the deliverable, the better the result.

8.2 Batch Related Tasks

Combine related work into single Cowork sessions. This is more efficient than running many small tasks separately, as each session has startup overhead for establishing context. A single session that processes 20 receipts is far more efficient than 20 individual sessions.

8.3 Use Chat for Simple Stuff

Not everything needs Cowork. If you are doing simple Q&A, brainstorming, or quick text generation, standard Chat mode is better suited and uses fewer tokens. Save Cowork for multi-step work that genuinely benefits from file access and autonomous execution.

8.4 Monitor Your Usage

Check Settings and Usage regularly. Cowork consumes significantly more resources than standard chat. On the Max 5x plan, you get approximately 225+ messages per 5-hour window, but a complex Cowork task may consume many messages worth of tokens in a single execution.

8.5 Keep Context Files Updated

Your about-me.md, preferences.md, and current-projects.md files should be living documents. Update them when your priorities change, when projects wrap up, or when you discover preferences you want Claude to remember.

8.6 Start Safe, Expand Gradually

Begin with a dedicated project folder, not your entire Documents directory. As you build trust and understanding with how Cowork operates, gradually expand to more sensitive folders and more complex tasks.

Chapter 9: Known Limitations

- **No memory across sessions:** Each Cowork session starts fresh. Claude does not retain information from previous sessions (which is why context files are essential).
- **No chat or artifact sharing:** Cowork sessions cannot be shared with other people.
- **Desktop app required:** Your computer must be awake and Claude Desktop must be open for tasks to run. If your computer sleeps or the app closes, active tasks stop.
- **Research preview:** Cowork is still officially in research preview. Anthropic advises against using it for regulated workloads.
- **Usage-intensive:** Complex Cowork tasks consume significantly more tokens than regular chat conversations.
- **Cowork activity is not captured:** Cowork activity does not appear in Audit Logs, Compliance API, or Data Exports. Conversation history is stored locally on your computer.
- **Agentic risks:** Because Cowork has internet access and can execute code, there are unique risks. Always review what Claude plans to do before granting permission for sensitive operations.

Chapter 10: 10 Premium Automation Prompts (Copy and Paste)

Below are ten detailed, ready-to-use prompts you can paste directly into Cowork to automate common daily tasks. Each prompt is crafted for maximum specificity and quality output. Simply customize the bracketed sections with your own details.

Prompt 1: Weekly Email Digest and Priority Sorter

Copy This Prompt

I need you to help me process my inbox for the week. Connect to my Gmail and do the following:

- 1. Review all unread emails from the past 7 days.*
- 2. Categorize each email into: URGENT (requires response today), ACTION NEEDED (requires response this week), FYI (informational only), and ARCHIVE (newsletters/promotions/irrelevant).*
- 3. For every URGENT and ACTION NEEDED email, draft a professional response that matches my communication style (see about-me.md).*
- 4. Create a file called weekly-email-digest-[DATE].xlsx with columns: Sender, Subject, Category, Summary (1 sentence), Suggested Response (first 2 lines), and Deadline.*
- 5. Sort by category (URGENT first) then by date.*
- 6. Add a summary tab showing: total emails processed, count per category, and the 3 most important items needing my attention. Save everything to this folder.*

Prompt 2: Meeting Preparation Package

Copy This Prompt

I have a meeting with [PERSON/TEAM NAME] on [DATE] at [TIME] about [TOPIC]. Prepare a complete meeting package:

- 1. Check my Google Calendar for this meeting and pull any attached agenda or documents.*
- 2. Search Google Drive for all documents related to [TOPIC] from the past 30 days.*
- 3. Create a meeting-prep-[DATE].docx with these sections:*
 - Meeting Details (date, time, attendees, Location/Link)*
 - Background Context (summary of relevant recent documents and communications)*
 - Key Discussion Points (3-5 items based on the documents found)*
 - Questions to Ask (5 strategic questions based on the context)*
 - Data Summary (any relevant numbers, metrics, or KPIs from found documents)*
 - Action Items Template (blank table: Item | Owner | Deadline | Status)*
- 4. If there are relevant spreadsheets or data*

files, create a separate one-page data summary as a PDF. Save all files in a subfolder called Meeting-[DATE]-[TOPIC].

Prompt 3: Expense Report Generator

Copy This Prompt

I have receipt screenshots and PDF invoices in this folder. Create a complete expense report:

1. Read every image and PDF in this folder.
2. Extract from each receipt: Date, Vendor Name, Category (choose from: Meals & Entertainment, Travel, Office Supplies, Software/Subscriptions, Professional Development, Other), Amount (in local currency), Payment Method (if visible), and a brief Description.
3. Create a file called expense-report-[MONTH]-[YEAR].xlsx with:
 - Sheet 1 (Detail): All extracted data in a formatted table with proper column headers
 - Sheet 2 (Summary): Total by category, total overall, average per transaction, date range covered
 - Sheet 3 (Flagged): Any receipts where the date or amount was unclear, marked as VERIFY with notes on what needs checking
4. Add conditional formatting: amounts over \$100 highlighted in yellow, amounts over \$500 highlighted in red.
5. Add a totals row at the bottom of Sheet 1.
6. Create a companion expense-report-[MONTH]-[YEAR].pdf with a printable summary. If any receipt is unreadable, list it in the Flagged sheet with the filename.

Prompt 4: Competitive Intelligence Report

Copy This Prompt

Research the following competitors and create a comprehensive competitive intelligence report:

Competitors: [COMPANY 1], [COMPANY 2], [COMPANY 3], [COMPANY 4], [COMPANY 5]

For each competitor, research and document:

1. Company overview (size, funding, headquarters, key leadership)
2. Core product/service offerings and recent launches (last 6 months)
3. Pricing model and publicly available pricing tiers
4. Target market and key customer segments
5. Recent news, partnerships, or strategic moves
6. Strengths and weaknesses vs. our company (refer to current-projects.md for our context)

Deliverables:-

- competitive-analysis-[DATE].docx: Full narrative report with executive summary (1 page), detailed company profiles (1-2 pages each), and strategic recommendations (1 page)
- competitive-matrix.xlsx: Side-by-side comparison spreadsheet with all competitors across the dimensions above-

competitive-summary.pptx: 10-slide presentation suitable for a Leadership meeting, with one slide per competitor and a final recommendations slide. Use web search for current data. Cite sources where possible.

Prompt 5: Daily Standup Report Compiler

Copy This Prompt

/schedule Create a daily standup summary that runs every weekday at 8:30 AM. Each morning, do the following:

- 1. Check Slack for messages in channels [#CHANNEL-1, #CHANNEL-2, #CHANNEL-3] from the past 24 hours.*
- 2. Check my Google Calendar for today's meetings and their agendas.*
- 3. Check Google Drive for any documents modified by my team in the past 24 hours.*
- 4. Compile a daily-standup-[DATE].md file with:*
 - TODAY'S MEETINGS: List with times, participants, and brief context*
 - OVERNIGHT UPDATES: Key messages from Slack organized by channel, highlighting anything that needs my attention*
 - DOCUMENT UPDATES: Files modified by team members with a one-line summary of changes*
 - SUGGESTED PRIORITIES: Based on all the above, suggest my top 3 priorities for the day*
 - BLOCKERS TO WATCH: Any items that seem stalled or at risk based on the communications*

Keep the format concise and scannable. Save to my /Daily-Standups/ folder.

Prompt 6: Content Calendar and Social Media Drafts

Copy This Prompt

Create a 30-day content calendar and draft posts for my [PLATFORM: LinkedIn/Twitter/Instagram].

- 1. Review my about-me.md for my professional focus areas and communication style.*
- 2. Research trending topics in [YOUR INDUSTRY] using web search.*
- 3. Create content-calendar-[MONTH]-[YEAR].xlsx with:*
 - Sheet 1 (Calendar): Date | Day | Platform | Content Type (thought leadership, how-to, case study, industry news, engagement question) | Topic | Draft Post | Hashtags | Best Posting Time*
 - Sheet 2 (Strategy): Content mix ratios, posting frequency recommendation, key themes for the month*
- 4. Write all 30 draft posts in full (not just ideas). Each post should be:*
 - Platform-appropriate length (LinkedIn: 150-300 words, Twitter: under 280 chars, Instagram: 100-200 words)*
 - Written in my voice (reference about-me.md)*
 - Include a clear call-to-action*
 - Include 3-5 relevant*

hashtags5. Create 5 “evergreen” posts that can be reused/recycled any time. Save everything to a /Content-[MONTH]/ subfolder.

Prompt 7: Invoice Processor and Financial Tracker

Copy This Prompt

Process all invoices in this folder and update my financial tracking: 1. Read every PDF and image file in this folder. 2. Extract from each invoice: Invoice Number, Vendor, Date Issued, Due Date, Line Items (description + amount), Subtotal, Tax, Total Amount, Payment Status (if indicated). 3. Create or update financial-tracker-[YEAR].xlsx with:

- Sheet 1 (ALL Invoices): Complete record of every invoice processed, sorted by date*
- Sheet 2 (Monthly Summary): Spending by month with totals, broken down by vendor*
- Sheet 3 (Vendor Analysis): Total spent per vendor YTD, average invoice size, payment frequency*
- Sheet 4 (Upcoming): Invoices with future due dates, sorted by urgency*
- Sheet 5 (Dashboard): Key metrics – total YTD spend, average monthly spend, top 5 vendors, month-over-month change*

4. Flag any invoices that appear to be duplicates (same vendor, same amount, same date range). 5. Create a separate overdue-invoices-[DATE].md listing any invoices past their due date. Use formulas for all calculations so the spreadsheet stays dynamic.

Prompt 8: Job Application Package Builder

Copy This Prompt

I’m applying for the role of [JOB TITLE] at [COMPANY NAME]. The job posting is saved in this folder as job-posting.pdf (or paste the URL: [URL]).

- 1. Analyze the job posting thoroughly: extract key requirements, preferred qualifications, technologies/skills mentioned, and company values.*
- 2. Review my existing resume (resume.pdf in this folder) and about-me.md.*
- 3. Create a tailored application package:*
 - tailored-resume-[COMPANY].docx: My resume reorganized and reworded to highlight the most relevant experience for THIS specific role. Use professional formatting with clear sections.*
 - cover-letter-[COMPANY].docx: A compelling, personalized cover letter (350-500 words) that connects my experience to their specific needs. Reference concrete achievements and demonstrate knowledge of the company.*
 - interview-prep-[COMPANY].md: * 10 likely interview questions based on*

the job posting * Suggested STAR-method answers drawing from my experience * 5 smart questions to ask the interviewer * Key talking points that align my background with their needs - skills-gap-analysis.md: Honest assessment of where I'm a strong fit and where I might need to address gaps, with suggestions for how to frame weaknesses. Make everything sound natural and authentic, not AI-generated.

Prompt 9: Project Status Report Generator

Copy This Prompt

Generate a comprehensive project status report for [PROJECT NAME].

- Review all files in this folder related to the project.
- Check Google Drive for any shared documents updated in the past 2 weeks.
- If Slack is connected, review recent messages in [#PROJECT-CHANNEL] for updates.
- Create project-status-[DATE].docx with:
 - Executive Summary (1 paragraph: overall health, key highlights, critical items)
 - Project Health Dashboard: Status (Green/Yellow/Red) for Scope, Timeline, Budget, Quality, Team Morale
 - Milestones Tracker: Planned vs actual dates, percentage complete
 - Accomplishments This Period: Bulleted list of completed items
 - In Progress: Current active tasks with owners and expected completion
 - Risks and Issues: Identified risks, probability, impact, mitigation plan
 - Blockers: Items preventing progress, who can resolve them
 - Upcoming Milestones: Next 2 weeks of planned deliverables
 - Resource Needs: Any additional resources or support required
 - Decisions Needed: Items requiring leadership input
- Also create project-status-[DATE].pptx: A 5-slide summary version suitable for a quick leadership review. Format everything professionally. Use the project name and date in all headers.

Prompt 10: End-of-Week Review and Next Week Planner

Copy This Prompt

/schedule Create a weekly review and planning session that runs every Friday at 4:00 PM. Every Friday, do the following:

- Check my Google Calendar for all meetings I had this week and all meetings scheduled for next week.
- Check Slack for key threads and decisions from this week.
- Check Google Drive for documents I created or edited this week.
- Review any files in my /Weekly-Reviews/ folder for patterns.
- Create weekly-review-[DATE].md with:

THIS WEEK IN REVIEW: - Meetings attended (count + highlights from each) - Key decisions made (based on Slack and document changes) - Documents created/modified (with brief descriptions) - Estimated hours in meetings vs. focus time *WINS:* - Identify 3-5 accomplishments based on the week's activity *INCOMPLETE:* - Items that were likely planned but show no progress *NEXT WEEK PREVIEW:* - Monday through Friday breakdown of scheduled meetings - Days with the most/least free time - Suggested focus blocks for deep work - Preparation needed for upcoming meetings *SUGGESTED PRIORITIES:* - Based on everything above, recommend my top 5 priorities for next week Save to /Weekly-Reviews/ folder. Keep format consistent each week so I can compare over time.

Chapter 11: Using Cowork Safely

Because Cowork is an agentic tool with file access and internet connectivity, safety is especially important. Here are key practices:

- Always review Claude's plan before approving execution, especially for tasks involving sensitive files or external services.
- Start with a dedicated, non-critical folder and expand access gradually as you build comfort.
- Assess how much you trust each MCP connector or website before extending access beyond Claude's default settings.
- Cowork stores conversation history locally on your computer. It is not subject to Anthropic's standard data retention policies.
- Do not use Cowork for regulated workloads (e.g., HIPAA, SOX, GDPR-critical processes) as it is still in research preview.
- Anthropic does not train on your local files. Your data stays on your machine.
- If working in a Team or Enterprise environment, coordinate with your administrator on approved plugins and connector permissions.

Chapter 12: Quick-Start Cheat Sheet

Step	Action	Time
1	Download Claude Desktop from claude.com/download	2 min
2	Sign in and subscribe to Pro (\$20/mo) or Max (\$100/mo)	3 min
3	Click the Cowork tab	5 sec
4	Select a working folder (start with a safe, dedicated folder)	30 sec
5	Create about-me.md, preferences.md, and current-projects.md	20 min
6	Set global instructions (tone, format, role)	5 min
7	Run your first task (try organizing a messy folder)	2 min
8	Install relevant plugins from the Customize menu	5 min
9	Connect tools via the Connector Directory in Settings	5 min
10	Set up your first scheduled task with <code>/schedule</code>	5 min

Total setup time: approximately 45 minutes. After that, every Cowork session starts with Claude already understanding your context, your preferences, and your current priorities.

>> Get 51 ready-to-use AI automation templates (Claude Cowork Blueprints added soon!) <<