

WORKSHOP • SESSION 1

Claude Cowork 101.

From install to first task.

How to get set up and run your first task, step by step.

By the end of this session, you will have...

- ✓ **Claude Desktop installed, Cowork open**
Agentic workspace mode running on your machine.
- ✓ **Three context files**
They teach Claude who you are and how you work.
- ✓ **One real task completed**
Output saved to your own computer.
- ✓ **A dedicated Cowork folder**
Structured for context, inputs, and outputs.
- ✓ **Settings configured**
Safe and repeatable, with the right guardrails.

This is hands-on. Follow each step on your machine as we go.

THE DIFFERENCE IN ONE SENTENCE

Chat gives you answers.

**Cowork gives you deliverables
saved to your computer.**

CHAT BOT

One question, one answer

No access to your files

Starts fresh every session

You copy and paste the output

Good for quick asks

CHAT VS COWORK

COWORK

- Multi-step execution
- Reads and writes in your folder
- Context files, memory, and projects
- Saves files to your computer
- Good for real work

What Cowork actually does



Read your files

Anything inside the folder you grant.



Create and edit docs

Write new files right on your computer.



Organize and batch

Rename and process many files at once.



Run workflows

Multi-step tasks, start to finish.



Connect to apps

Email, calendar, and tools when enabled.



Produce deliverables

Finished work, not just chat text.

What you need before you start

REQUIRED

- ✓ Paid Claude plan: Pro, Max, Team, or Enterprise
- ✓ Claude Desktop app, Mac or Windows
- ✓ Active internet connection
- ✓ A dedicated folder on your computer

NOT SUPPORTED

- ✗ Free Claude plan
- ✗ Web browser only
- ✗ Mobile app only

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Download Claude Desktop

- 1 Go to claude.com/download
- 2 Choose Mac or Windows
- 3 Install the app
- 4 Sign in with your Claude account
- 5 Confirm your plan shows as paid

Cowork lives inside Desktop. It is not a separate app.

Open Cowork mode

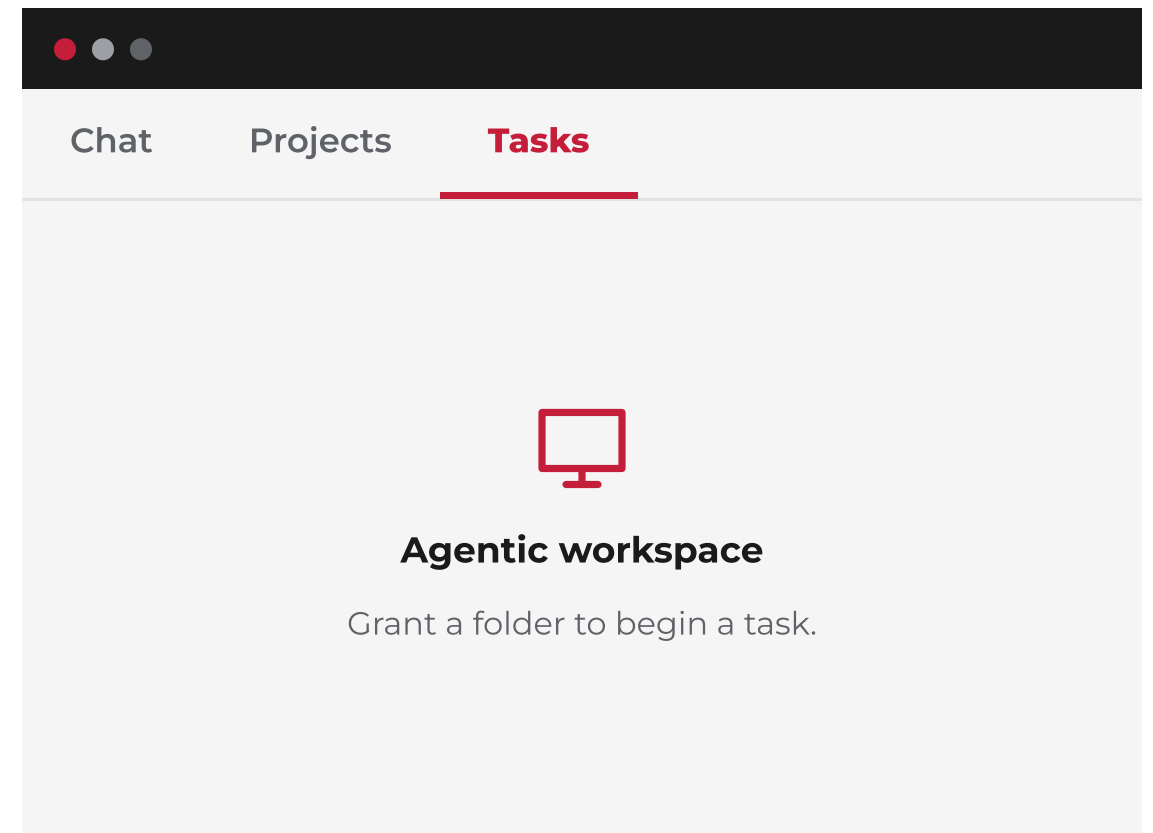
- 1 Open Claude Desktop
- 2 Click the **Tasks** tab at the top. Some versions show Cowork.
- 3 You are now in agentic workspace mode

TROUBLESHOOTING

No tab? Update the app.

Still missing? Sign out and sign back in.

Confirm your paid plan is active.



Create your Cowork folder

Cowork/

Context/

about-me.md

brand-voice.md

working-rules.md

Projects/

Inputs/

Outputs/

GOLDEN RULE

Never point Cowork at your entire computer.

One dedicated folder only.

What each folder does



Context/

Who you are, how you write,
how Claude should behave.



Projects/

Recurring work streams,
one subfolder each.



Inputs/

Files you drop in for the
current task.



Outputs/

Finished deliverables
Claude saves here.

File access: copy it in first

Cowork can only read and write inside the folder you grant.

- Files in Downloads? Copy them into your Cowork folder first.
- Files on Desktop? Copy them into Inputs/ first.
- Dragging from outside the folder? Cowork cannot work with it.

THE FIX Copy everything you need into your Cowork folder before starting.

Write your context files

Create three markdown files in **Context/**



about-me.md

Role, company, priorities, tools.



brand-voice.md

Tone, format rules, words you never use.



working-rules.md

How Claude should behave.

Key insight. Write it once. Claude reads it every session. You stop re-explaining yourself.

about-me.md

About Me

- Name:
- Role:
- Company:
- What I do day to day:
- Current top 3 priorities:
- Tools I use:

Tip. Two paragraphs of real detail beats generic filler.

brand-voice.md

Brand Voice

- Tone: professional, warm, direct
- Format: BLUF first, bullets for email
- Words I never use:
- Example of writing I like:
(paste 2–3 sentences from your own work)

working-rules.md

Working Rules

- Ask clarifying questions before big tasks
- Save final deliverables to Outputs/
- Never overwrite files. Create versioned copies
- Never send email. Draft only
- Show your plan and wait for approval
- If data looks sensitive, stop and ask

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Configure Cowork settings

Settings → Cowork → Global Instructions

Write your standing brief.

Settings → General

Personal preferences.

Settings → Capabilities

Enable memory, connectors, and tools as needed.

Global instructions

You are my AI coworker, not a chatbot.

Before any task:

1. Read all files in Context/ completely
2. Ask clarifying questions if anything is ambiguous
3. Show your plan and wait for approval on multi-file work

Always save deliverables to Outputs/

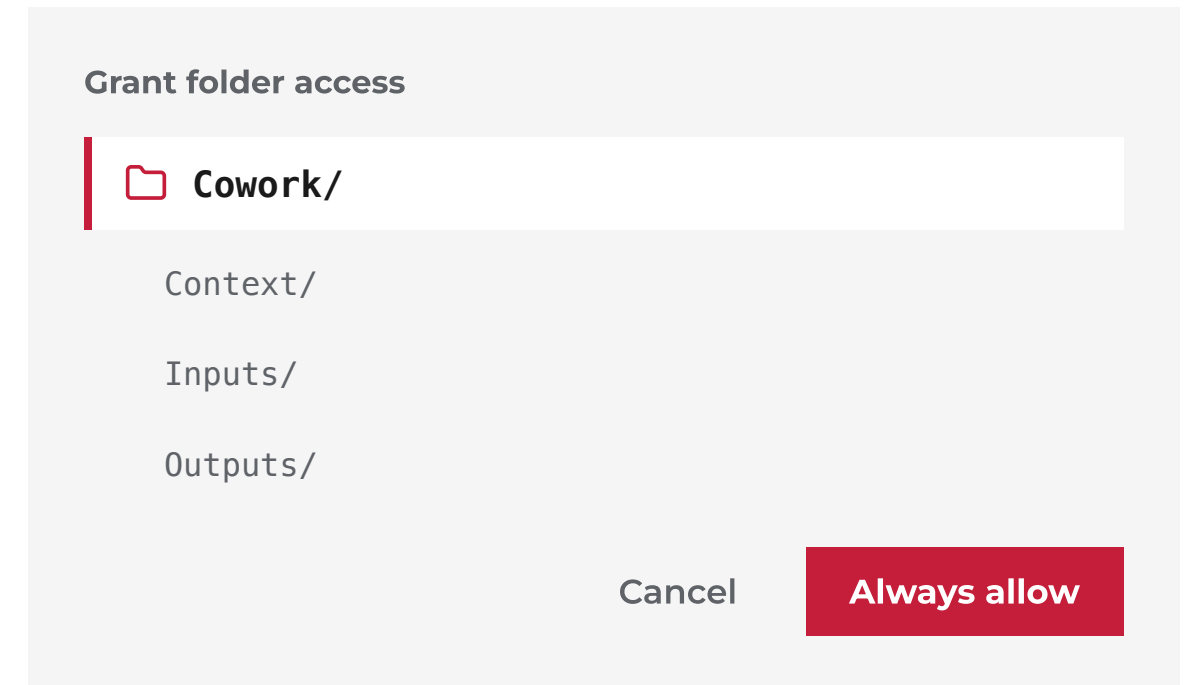
Never overwrite existing files

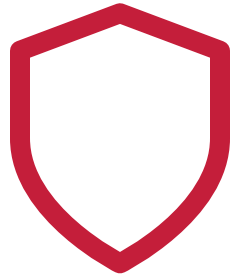
Never send email. Draft only

If you encounter sensitive data, stop and ask

Point Cowork at your folder

- 1 In the Tasks or Cowork tab, select your working folder
- 2 Navigate to your Cowork/ folder
- 3 Click **Always allow** when prompted
- 4 Confirm Cowork can see Context/, Inputs/, Outputs/





Safety before autonomy

- 1 Dedicated folder only. Least privilege.
- 2 Back up before batch changes.
- 3 Plan, then approve, before Claude executes.
- 4 Keep Desktop open during tasks.

Treat Cowork like a brilliant new hire you supervise until trust is built.

THE MOST IMPORTANT PROMPT

“Show me your plan and the exact files you will create or modify. Do not execute until I approve.”

One sentence turns Cowork from autonomous to collaborative.

Run your first real task

1

Drop sample files in Inputs/

2

Paste the starter prompt

3

Answer Claude's clarifying questions

4

Review and approve the plan

5

Let Cowork execute

6

Open files in Outputs/ and proofread

Starter prompt

Read every file in Context/ completely. Do not start work yet.
Ask me 3 clarifying questions about the task below.

Task:

Take the files in Inputs/ and produce:

- 1) A one-page summary saved to Outputs/summary.md
- 2) An action-item table with owner and due date
- 3) A draft follow-up email in my voice

Show your plan and the exact files you will create.

Wait for my approval before writing anything.

Save all deliverables to Outputs/

How to know it worked

YOU SHOULD SEE

- ✓ New files in Outputs/ on your computer
- ✓ Writing that matches your voice
- ✓ Specific action items with owners and dates
- ✓ You proofread before sharing

RED FLAGS

Generic tone

Strengthen brand-voice.md

Wrong location

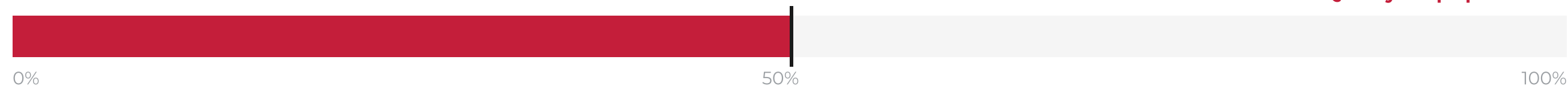
Remind Claude about Outputs/

Unapproved changes

Always use plan, then approve

Managing long sessions

Context used



- The context window is large, but quality drops above roughly 50% usage.
- Watch for Claude forgetting earlier instructions.

WHEN A SESSION GETS LONG

Run `/compact`, or start fresh.

Before closing, save state to `memory.md` with no date in the filename.

Project subfolders

Projects/Client-Name/

CLAUDE.md

memory.md

(project files)

■ Create a project folder for multi-week work.

■ Use the parent folder plus Inputs/ for quick one-offs.

Session 2 preview



Connectors

Email, calendar, and project tools.



Scheduled routines

Recurring automated tasks.



Email workflow

Claude drafts, you review and send.



Common problems, fast fixes

PROBLEM	FAST FIX
No Tasks tab	Update the app, confirm paid plan
Cannot read a file	Copy it into the granted folder
Session died	Keep Desktop open
Generic output	Add real samples to brand-voice.md
Wrong files changed	Use plan, then approve

Homework

- 1** Fill in all three Context/ files with real content.
- 2** Run one real task from your actual work.
- 3** Save the output to Outputs/ and proofread it.
- 4** Write down one win and one question.

Recap: 7 setup steps

- 1** Download Desktop, confirm paid plan
- 2** Open the Tasks or Cowork tab
- 3** Create the Cowork/ folder structure
- 4** Write three Context/ files
- 5** Configure Settings and Global Instructions
- 6** Grant folder access
- 7** Run your first task with plan, then approve

YOU GRADUATED

From chat bot to **coworker**.

Chat gives you answers. Cowork gives you deliverables.

Context files

Your permanent briefing packet.

Plan, then approve

You stay in control.

Always proofread

Before you share anything.

Questions?