THE COMPLETE

CLAUDE COWORK PLAYBOOK

Step-by-Step Instructions for Every Use Case

From Expense Reports to Meeting Analysis,
File Organization to Duplicate Detection

Your Complete Guide to the First General-Purpose Agent

How to Use This Guide

This playbook gives you exact, copy-paste-ready instructions for the most powerful Claude Cowork use cases. Each section follows the same structure:

1. **What You'll Need** — The files, folders, and setup required before you start
2. **The Exact Prompt** — Copy this verbatim into Cowork (then customize)
3. **What to Expect** — What Claude will do and how long it typically takes
4. **Pro Tips** — How power users get even better results
5. **Common Pitfalls** — What to avoid and how to fix problems

Golden Rule: The more specific your prompt, the better your output. Vague requests get vague results. Detailed requests get deliverables.

Note: Claude Cowork is currently only available to users with a Max subscription and the Claude macOS desktop app.

1. Expense Tracking & Financial Administration

The Problem: You have a pile of receipt photos, PDFs, and screenshots scattered across your phone and email. Creating an expense report means hours of manual data entry.

What You'll Need

- A dedicated folder on your computer (e.g., "January 2026 Expenses")
- All your receipts in that folder — any format works (JPG, PNG, PDF, screenshots)
- 5-10 minutes to gather everything before you start

Setup Steps

6. **Create your folder:** Open Finder → Go to Documents → Create New Folder → Name it "[Month] [Year] Expenses"
7. **Gather receipts from phone:** AirDrop photos to your Mac, or use iCloud Photos to sync
8. **Gather receipts from email:** Search Gmail/Outlook for "receipt" → Download PDFs → Move to your folder
9. **Don't rename anything:** Cowork will figure out what each file contains
10. **Open Claude Desktop:** Click the Cowork tab in the sidebar

The Exact Prompt

Copy this into Cowork after granting folder access:

```
Create a detailed expense report from all the receipts in this folder. Requirements: • Create an Excel file with these columns: Date, Vendor, Description, Category, Amount, Payment Method, Tax Deductible (Yes/No) • Categories to use: Meals & Entertainment, Travel, Office Supplies, Software/Subscriptions, Professional Services, Other • Add a separate tab called "Summary" with subtotals by category • Add conditional formatting: highlight amounts over $100 in yellow, over $500 in orange • Include a "Notes" column and flag any receipts that are unclear or potentially missing information • Sort everything by date, newest first • Name the file "Expense_Report_[Month]_[Year].xlsx"
```

What to Expect

- **Time:** 5-15 minutes depending on number of receipts (50 receipts ≈ 10 minutes)
- **Claude's process:** Opens each file → Extracts vendor, date, amount → Categorizes → Builds spreadsheet
- **Output:** A production-ready .xlsx file with working formulas, not a CSV you need to clean up
- **You'll see:** Checkmarks appearing as Claude processes each step

Pro Tips

11. **Add your company's expense categories:** Replace the generic categories above with whatever your accounting department uses
12. **Include receipt images in the spreadsheet:** Add to your prompt: "Create a second tab called 'Receipt Images' with thumbnails linked to each expense"
13. **Monthly automation:** Create a recurring folder structure (e.g., "2026/01-January/Receipts") and process monthly
14. **Currency conversion:** Add: "Convert all foreign currencies to USD using today's exchange rate and note the original amount"

Common Pitfalls

- **Blurry photos:** Claude will flag these but might extract partial info. Retake photos of critical receipts
- **Handwritten receipts:** Success rate is lower. Add a note asking Claude to flag uncertain amounts
- **Missing dates:** Some receipts don't show dates clearly. Claude will use file creation date as a fallback

2. File Organization & Clean Up

The Problem: Your Downloads folder is a graveyard of "Document (1).pdf", "Screenshot 2025-12-15", and files you can't identify without opening them.

What You'll Need

- The folder you want to organize (Downloads, Desktop, Documents, or any project folder)
- A sense of what categories make sense for your files
- **Backup recommendation:** Copy the folder first if it contains anything irreplaceable

Setup Steps

15. **Identify your target folder:** Start with Downloads — it's usually the messiest and least risky
16. **Optional backup:** Right-click the folder → Compress → Keep the .zip as a safety net
17. **Open Cowork:** Click "Select Folder" and choose your target folder
18. **Grant access:** You're giving Claude permission to read, rename, and move files within this folder only

The Exact Prompt

For a general Downloads cleanup:

```
Organize this Downloads folder completely.  Instructions: 1. First, analyze
every file to understand what it contains (don't just look at filenames) 2.
Create these subfolders: Work, Personal, Reference, Media, Archives,
Installers, Misc 3. Rename files to be descriptive based on their content
(e.g., "Screenshot 2025-12-15" → "Tax_Form_W2_2025.pdf" if that's what it is)
4. Move each file to the appropriate subfolder 5. For duplicate files, keep
```

```
the most recent version and move older duplicates to "Archives/Duplicates" 6. Create a log file called "Organization_Log.txt" that lists every change you made (original name → new name, original location → new location) 7. Don't delete anything — just organize  Naming convention: Use underscores, no spaces, capitalize first letter of each word (e.g., "Project_Proposal_ClientName.pdf")
```

Alternative Prompt: Project-Based Organization

```
Organize this folder by project.  Instructions: 1. Analyze each file to identify which project it belongs to 2. Create a folder for each distinct project you identify 3. Create an "_Uncategorized" folder for files that don't fit any project 4. Rename files to include the project name as a prefix 5. Within each project folder, create subfolders: Documents, Images, Data, Correspondence 6. Generate an index file for each project listing all files with one-sentence descriptions
```

What to Expect

- **Time:** 15-45 minutes for a typical Downloads folder (200-500 files)
- **Claude's process:** Opens files to understand content → Creates folder structure → Renames → Moves → Logs
- **Output:** Clean folder structure + detailed log of all changes
- **Watch the steps:** You'll see Claude's plan before execution — stop it if something looks wrong

Pro Tips

19. **Start with "analyze only" mode:** Add "First, give me a summary of what you found before making any changes" to review before organizing
20. **Add date prefixes:** Include "Add YYYY-MM-DD prefix to all files based on creation or content date" for chronological sorting
21. **Preserve original names:** Add "Include original filename in the log" if you might need to reference old names
22. **Tag system:** Ask Claude to add macOS tags (colors) to files by category for visual organization

Common Pitfalls

- **Application installers:** These sometimes break if renamed. Add: "Don't rename .dmg or .pkg files"
- **Hidden files:** Files starting with "." are system files. Add: "Ignore hidden files and system files"
- **Too aggressive:** If Claude creates too many categories, simplify your prompt to specify fewer folders

3. Meeting & Transcript Analysis

The Problem: Meeting notes and interview transcripts pile up faster than anyone can process them. Important insights get buried in hours of recorded conversation.

What You'll Need

- Transcript files (from Otter.ai, Zoom transcripts, Fireflies, Rev, or any transcription service)
- Files in text-readable format (.txt, .docx, .pdf with selectable text)
- A clear analysis goal (themes, action items, decisions, sentiment, etc.)

Setup Steps

23. **Export your transcripts:** From Otter: Menu → Export → Word. From Zoom: Recordings → Download Transcript
24. **Create a transcripts folder:** Group related transcripts (e.g., "User_Interviews_Q1" or "Team_Standups_January")
25. **Name files clearly:** "2026-01-15_Interview_JohnSmith.txt" is better than "Transcript (3).txt"
26. **Grant Cowork access:** Select the folder containing your transcripts

The Exact Prompt

For extracting action items and decisions from meetings:

```
Analyze all meeting transcripts in this folder and create a comprehensive summary.  For each meeting, extract: 1. Key decisions made (with who made them) 2. Action items (with owner and deadline if mentioned) 3. Open questions that weren't resolved 4. Important context or background mentioned  Then create: • A master action items list combining all meetings, sorted by owner • A decisions log with date and context • A "Key Themes" section identifying topics that came up across multiple meetings • Any red flags (disagreements, concerns raised, risks identified)  Output as an Excel file with separate tabs for: Action Items, Decisions, Themes, Red Flags, and a Meeting-by-Meeting summary.
```

Alternative: User Research Interview Analysis

```
Conduct qualitative analysis of these user interview transcripts.  For each interview: 1. Identify the participant's role, context, and key demographics mentioned 2. Extract direct quotes that illustrate key pain points, needs, or insights 3. Note emotional moments (frustration, excitement, confusion) 4. Identify feature requests or suggestions  Across all interviews, create: • A thematic analysis with major themes and sub-themes • A "Quote Bank" organized by theme (with participant identifier and context) • A frequency analysis (which themes appeared in how many interviews) • Contradictions or disagreements between participants • Prioritized recommendations based on frequency and intensity of feedback  Output: Word document with thematic analysis + Excel file with quote bank and frequency data.
```

What to Expect

- **Time:** 5-20 minutes depending on transcript length and number of files
- **Claude's process:** Reads each transcript sequentially → Extracts structured data → Cross-references → Synthesizes
- **Output quality:** Comparable to a research assistant spending 4-8 hours on manual coding

Pro Tips

27. **Add speaker context:** Include a note like "John = CEO, Sarah = PM, Mike = Engineer" so Claude can attribute appropriately
28. **Request verbatim quotes:** Add "Include exact quotes with timestamps for all key insights" for documentation
29. **Sentiment analysis:** Add "Rate each participant's overall sentiment (positive/neutral/negative) with supporting evidence"
30. **Follow-up questions:** Add "Suggest 5 follow-up questions based on gaps in the research"

Common Pitfalls

- **Transcription errors:** AI transcription isn't perfect. Claude may misinterpret garbled sections
- **Unnamed speakers:** If transcripts show "Speaker 1, Speaker 2" add context about who's who
- **Audio-only files:** Cowork can't process audio directly. Transcribe first using Whisper, Otter, or Zoom

4. Calendar Analysis & Daily Prep

The Problem: You start each day reactive instead of proactive. Meetings sneak up on you. You're constantly context-switching without a coherent plan.

What You'll Need

- Chrome integration enabled (Settings → Integrations → Chrome)
- Access to your calendar in Chrome (Google Calendar, Outlook Web, etc.)
- 5 minutes each morning (or evening before)

Setup Steps

31. **Enable Chrome integration:** Claude Desktop → Settings → Integrations → Claude in Chrome → Enable
32. **Open your calendar in Chrome:** Navigate to calendar.google.com or outlook.office.com
33. **Set to week view:** Gives Claude the best context for your schedule
34. **Start Cowork:** You don't need folder access for this — just Chrome integration

The Exact Prompt

For a daily morning briefing:

```
Look at my Google Calendar for today and this week. Give me a briefing that includes:  1. TODAY'S SCHEDULE    • List all meetings with times and attendees • Flag any back-to-back meetings where I won't have breaks    • Identify my longest focus block (unscheduled time)  2. PREP REQUIREMENTS    • Which meetings likely need preparation? (ones where I'm presenting, external calls, 1:1s with reports)    • Estimate prep time needed for each    • Suggest what order to tackle prep in  3. WEEK OVERVIEW    • How heavy is this week compared to typical? (count total meeting hours)    • Which days are meeting-heavy vs. focus-heavy?    • Any conflicts or double-bookings I should address?  4. RECOMMENDATIONS    • Should I protect any specific time blocks?    • Any meetings that could potentially be emails or async?    • Suggested daily theme based on my meetings (e.g., "Tuesday = strategy day")  Output as a clean Word document I can reference throughout the day.
```

Alternative: Weekly Planning Session

```
Analyze my calendar for the past 4 weeks and next 2 weeks.  I want to understand: 1. How am I actually spending my time? (categories: meetings, focus time, 1:1s, external, internal) 2. What percentage of my week is meetings vs. heads-down work? 3. Are there patterns? (heavy meeting days, protected focus time that keeps getting invaded, etc.) 4. How does next week compare to my recent average?  Recommendations I want: • Which recurring meetings should I audit (low-value candidates)? • How should I restructure my week for better focus? • What boundaries should I set going forward?  Create a brief report with data visualizations where helpful.
```

What to Expect

- **Time:** 2-5 minutes for daily briefing, 10-15 minutes for weekly analysis
- **Claude's process:** Accesses calendar via Chrome → Extracts meeting data → Analyzes patterns → Generates recommendations
- **Output:** A document that serves as your daily command center

Pro Tips

35. **Make it a routine:** Run this same prompt every morning. The consistency builds the habit
36. **Add personal context:** Include "I'm a morning person — protect 9-11am for deep work" or "I have a big presentation Friday"
37. **Link to prep materials:** If you have meeting docs in a folder, grant access and add "Check the /Meetings folder for any prep documents"
38. **End-of-day version:** Run a modified version at 5pm: "What didn't get done today? What do I need to prep for tomorrow?"

Common Pitfalls

- **Calendar not loaded:** Make sure your calendar is actually open in Chrome before running

- **Private events:** Events marked private may only show as "Busy" — Claude can see the block but not details
- **Multiple calendars:** If you have overlapping calendars, specify which one(s) to analyze

5. Duplicate Detection & Cleanup

The Problem: Your hard drive has accumulated multiple copies of the same files — photos, documents, downloads — eating up storage and creating confusion.

What You'll Need

- The folder(s) you want to scan
- Decision about what to do with duplicates (delete, archive, or just flag)
- Backup if scanning important folders

Setup Steps

39. **Identify target folders:** Downloads, Documents, and Photos are common duplicate hotspots
40. **Backup if nervous:** Right-click → Compress to create a safety backup
41. **Grant folder access:** Select the folder to scan
42. **Start with analysis mode:** Have Claude find duplicates before deleting anything

The Exact Prompt

For safe duplicate detection:

```
Scan this folder for duplicate files and create a detailed report.  Detection criteria: • Identical content (even if names differ) • Near-duplicates for images (same photo, different resolution/format) • Similar documents (same content with minor differences)  For each duplicate set found: • List all file paths • Show file sizes and dates • Recommend which to keep (usually newest or highest quality) • Calculate space that would be freed  OUTPUT FIRST: Create a report file called "Duplicate_Report.xlsx" with: • Tab 1: Exact Duplicates (identical files) • Tab 2: Near Duplicates (similar but not identical) • Tab 3: Summary (total duplicates, space usage, recommendations)  DO NOT DELETE ANYTHING YET. I want to review the report first.
```

Follow-Up: After Reviewing Report

```
I've reviewed the duplicate report. Please proceed with cleanup:  1. For exact duplicates: Keep the newest version, move older duplicates to a "Duplicates_ToDelete" folder 2. For near-duplicates: Keep the highest quality version, move others to "Duplicates_ToDelete" 3. Create a log file documenting every move 4. Tell me total space freed  I will manually delete the "Duplicates_ToDelete" folder after reviewing it.
```

What to Expect

- **Time:** 10-30 minutes depending on folder size and file count

- **Claude's process:** Scans files → Computes hashes for exact matches → Analyzes content for near-duplicates → Reports
- **Storage savings:** Commonly 5-20GB on a typical Downloads folder
- **Safety:** Two-phase approach (report first, delete later) prevents accidents

Pro Tips

43. **Include subfolders:** Add "Scan all subfolders recursively" to catch nested duplicates
44. **Focus on large files:** Add "Prioritize files over 10MB" to maximize space recovery
45. **Exclude certain folders:** Add "Ignore any folders named 'node_modules' or '.git'" for dev folders
46. **Photo-specific scan:** Add "Use visual comparison for images to find crops and resizes of the same photo"

Common Pitfalls

- **Intentional duplicates:** Some duplicates are intentional (backups). Review before deleting
- **Linked files:** Some apps create aliases/shortcuts that look like duplicates
- **System files:** Never scan system folders. Stick to user documents

Quick Reference: Prompt Starters

Copy these directly into Cowork to get started quickly. Customize the bracketed sections.

Use Case	Quick Prompt
Expense Report	Create an expense report Excel file from all receipts in this folder. Categorize by type, add subtotals, flag items over $100.
File Organization	Organize this folder: analyze each file's content, create logical subfolders, rename files meaningfully, and create a log of all changes.
Meeting Analysis	Analyze these meeting transcripts: extract action items with owners, key decisions, and unresolved questions. Output as Excel.
Daily Prep	Check my Google Calendar for today. Give me a briefing: meetings, prep needed, focus blocks, and recommendations.
Duplicate Cleanup	Find duplicate files in this folder. Create a report showing all duplicates, space used, and recommendations. Don't delete yet.

Best Practices for Success

The Specificity Principle

The single most important factor in Cowork success is prompt specificity. Compare these:

❌ Vague (Poor Results)	✓ Specific (Great Results)
Organize my files	Create folders for Work, Personal, Reference. Rename files based on content. Create a change log.
Make a spreadsheet	Create Excel with columns: Date, Vendor, Amount, Category. Add subtotals. Highlight items over $100.
Research competitors	Research CompanyA, CompanyB, CompanyC. For each: pricing, features, recent news. Create comparison matrix in Excel.

The Trust Ladder

Build trust incrementally:

47. **Level 1: Read-only analysis** — Claude reads files, produces reports. No modifications.
48. **Level 2: File creation** — Claude creates new files (spreadsheets, documents) but doesn't modify existing ones.
49. **Level 3: File organization** — Claude renames and moves files within your folder.
50. **Level 4: Web research** — Claude browses the web, combines with local files.

The Queue Advantage

Use the queue button to add context mid-task without interrupting execution:

- "I forgot — also include receipts from my email. Check the 'Email Receipts' subfolder."
- "For the meeting analysis, focus especially on the action items."
- "Ignore the 'Archive' folder — those are old files."

Folder Hygiene

- **Create task-specific folders:** "January Expenses" not "Stuff"
- **Grant minimum access:** Only give access to folders the task actually needs
- **Backup before major changes:** Right-click → Compress creates a quick safety net
- **Review the plan:** Cowork shows you what it will do before doing it. Read it.

Ready to Get Started?

Pick one use case from this guide and try it today.

Start simple. Build trust. Expand from there.

The future of work is an inbox where you queue up tasks
and an agent works through them while you do other things.

That future is here.