

CLAUDE COWORK COMPLETE SETUP SOP

Standard Operating Procedure: From Zero to Fully Automated

Document Version: 1.0

Last Updated: 2026-03-16

Created By: Automated Marketer Team

Status: Complete & Tested

TABLE OF CONTENTS

1. 1. Prerequisites & Requirements
2. 2. Phase 1: Initial Installation & Setup
3. 3. Phase 2: Global Instructions Configuration
4. 4. Phase 3: Folder Structure Setup
5. 5. Phase 4: Connector Integration
6. 6. Phase 5: Building Core Skills
7. 7. Phase 6: Creating Live Demo Automations
8. 8. Phase 7: Scheduled Tasks Setup
9. 9. Phase 8: Memory System Configuration
10. 10. Troubleshooting & Best Practices

1. PREREQUISITES & REQUIREMENTS

✓ What You Need Before Starting:

Required:

- ✓ Claude Pro or Max subscription (\$20/month minimum)
- ✓ Computer: Mac (macOS 12+) or Windows (10/11)
- ✓ Internet connection (stable, 10+ Mbps recommended)
- ✓ Gmail account (for email automation)
- ✓ Google Calendar access
- ✓ 2-3 hours of uninterrupted setup time

Recommended:

- ✓ Google Drive account
- ✓ Slack workspace (for notifications)
- ✓ GitHub account (for code/project management)
- ✓ Canva account (for design automation)
- ✓ YouTube channel (for content repurposing)

Optional:

- Fireflies.ai account (for meeting transcripts)
- Zapier account (for additional app connections)

2. PHASE 1: INITIAL INSTALLATION & SETUP

Step 1.1: Download Claude Desktop

Time Required: 5 minutes

1. Open your browser and navigate to: claude.com/download
2. Select your operating system:
 - Mac: Click "Download for macOS"
 - Windows: Click "Download for Windows"
3. Wait for download to complete (approx. 150MB file)
4. Install the application:
 - Mac: Open the .dmg file → Drag Claude to Applications folder
 - Windows: Run the .exe installer → Follow installation wizard
5. Launch Claude Desktop from your Applications/Start Menu
6. Sign in with your Claude Pro/Max account credentials

✓ **VERIFICATION:** You should see the Claude Desktop interface with three tabs at the top: Chat, Cowork, Code

Step 1.2: Create Sandbox Folder

Time Required: 2 minutes

⚠ **WHY THIS MATTERS:** The sandbox folder restricts Claude's access to only designated files, ensuring your entire computer isn't exposed.

1. Navigate to your Desktop (or preferred location)
2. Right-click in empty space → Select "New Folder"
3. Name the folder: Claude-Cowork-Sandbox
4. Create subfolders inside (optional but recommended):
 - Projects/
 - Skills/
 - Outputs/
 - Templates/

✓ **VERIFICATION:** You should have a new folder visible on your desktop named Claude-Cowork-Sandbox

Step 1.3: Grant Folder Access to Claude

Time Required: 2 minutes

1. Open Claude Desktop → Click the "Cowork" tab at the top
2. Click the folder icon or "Work in a folder" button
3. Click "Choose a different folder"
4. Navigate to your Desktop → Select Claude-Cowork-Sandbox
5. Click "Open"
6. Permission Dialog appears → Click "Always Allow"
(This grants Claude persistent access to this folder only)

 **VERIFICATION:** The folder path should now show in the Cowork interface:
`~/Desktop/Claude-Cowork-Sandbox`

3. PHASE 2: GLOBAL INSTRUCTIONS CONFIGURATION

Step 2.1: Access Settings

Time Required: 1 minute

11. 1. Click your profile icon (bottom-left corner of Claude Desktop)
12. 2. Select "Settings" from dropdown menu
13. 3. Navigate to "Cowork" section in left sidebar
14. 4. Click "Edit" next to "Global instructions"

Step 2.2: Configure Personal Preferences

Time Required: 10 minutes

Copy and customize this template:

```
# GLOBAL INSTRUCTIONS FOR CLAUDE COWORK

## About Me
- Name: [YOUR NAME]
- Role: [YOUR JOB TITLE / BUSINESS]
- Industry: [YOUR INDUSTRY]
- Time Zone: [YOUR TIME ZONE]

## My Business
- Company: [COMPANY NAME]
- What we do: [BRIEF DESCRIPTION]
- Target customers: [WHO YOU SERVE]
- Key products/services: [WHAT YOU OFFER]

## Communication Style
- Tone: [Direct and professional / Casual and friendly / etc.]
- Keep responses: [Concise / Detailed / Balanced]
- Avoid: [Corporate jargon / Technical terms / etc.]
- When in doubt: [Ask clarifying questions / Make reasonable assumptions]

## Work Preferences
- Primary tools: Gmail, Google Calendar, Google Drive, Slack, YouTube
- File organization: [How you like files organized]
- Naming conventions: [How you name files/projects]
- Default formats: [Preferred file formats - PDF, DOCX, etc.]

## Core Rules
1. Always check my calendar before scheduling anything
2. Draft emails in my tone (reference past emails in Gmail)
3. Save all outputs to appropriate subfolders in my workspace
4. Ask permission before making irreversible changes
5. When creating scheduled tasks, verify timing with me first

## Special Instructions
- [Any unique requirements for your workflow]
```

- [Industry-specific terminology to use]
- [Things you never want Claude to do]

Action Steps:

15. 1. Copy the template above
16. 2. Replace all [BRACKETED] items with your actual information
17. 3. Paste into Global Instructions field
18. 4. Click "Save"

 **VERIFICATION: Close and reopen settings - your global instructions should still be there**

4. PHASE 3: FOLDER STRUCTURE SETUP

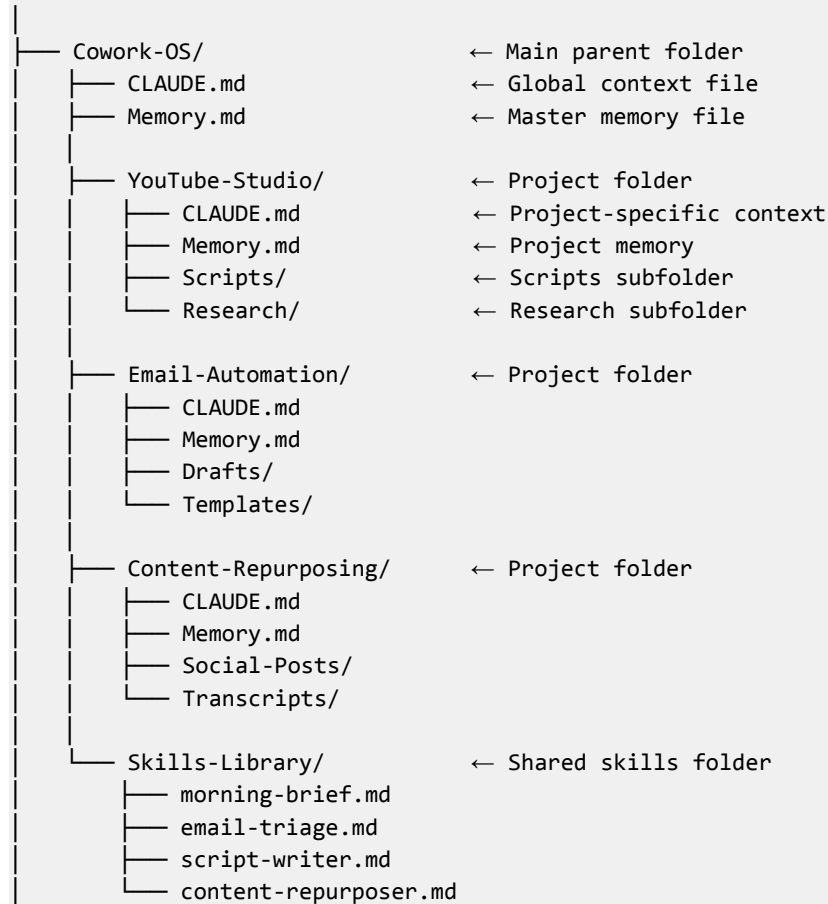
Step 3.1: Create Cowork OS Structure

Time Required: 5 minutes

This hierarchical folder system allows Claude to maintain separate context for different projects.

Create this exact structure in your sandbox folder:

Claude-Cowork-Sandbox/



How to Create:

19. 1. Open File Explorer (Windows) or Finder (Mac)
20. 2. Navigate to Claude-Cowork-Sandbox/
21. 3. Create main folder: Right-click → New Folder → Name: Cowork-OS
22. 4. Inside Cowork-OS, create:
 - Folder: YouTube-Studio
 - Folder: Email-Automation
 - Folder: Content-Repurposing
 - Folder: Skills-Library
23. 5. Inside each project folder, create:
 - Text file: CLAUDE.md

- Text file: Memory.md
- Relevant subfolders (Scripts, Drafts, etc.)

✓ **VERIFICATION: Your folder structure should match the tree diagram above**

5. PHASE 4: CONNECTOR INTEGRATION

Step 4.1: Connect Gmail

Time Required: 3 minutes

24. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
25. 2. Navigate to "Connectors" in left sidebar
26. 3. Click "Browse connectors"
27. 4. Search for "Gmail"
28. 5. Click "Connect" next to connector
29. 6. Browser window opens → Sign in to your account
30. 7. Review permissions → Click "Allow"
31. 8. Return to Claude → Verify connection status

 **VERIFICATION:** In Connectors settings, Gmail should show green "Connected" badge

Step 4.2: Connect Google Calendar

Time Required: 2 minutes

32. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
33. 2. Navigate to "Connectors" in left sidebar
34. 3. Click "Browse connectors"
35. 4. Search for "Google Calendar"
36. 5. Click "Connect" next to connector
37. 6. Browser window opens → Sign in to your account
38. 7. Review permissions → Click "Allow"
39. 8. Return to Claude → Verify connection status

 **VERIFICATION:** In Connectors settings, Google Calendar should show green "Connected" badge

Step 4.3: Connect Google Drive

Time Required: 2 minutes

40. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
41. 2. Navigate to "Connectors" in left sidebar
42. 3. Click "Browse connectors"
43. 4. Search for "Google Drive"
44. 5. Click "Connect" next to connector
45. 6. Browser window opens → Sign in to your account
46. 7. Review permissions → Click "Allow"
47. 8. Return to Claude → Verify connection status

✓ **VERIFICATION: In Connectors settings, Google Drive should show green "Connected" badge**

Step 4.4: Connect Slack

Time Required: 3 minutes

48. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
49. 2. Navigate to "Connectors" in left sidebar
50. 3. Click "Browse connectors"
51. 4. Search for "Slack"
52. 5. Click "Connect"
53. 6. Sign in to your Slack workspace
54. 7. Select workspace to connect
55. 8. Choose channels Claude can access
56. 9. Authorize connection

✓ **VERIFICATION: In Connectors settings, Slack should show green "Connected" badge**

Step 4.5: Connect YouTube

Time Required: 3 minutes

57. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
58. 2. Navigate to "Connectors" in left sidebar
59. 3. Click "Browse connectors"
60. 4. Search for "YouTube"
61. 5. Click "Connect" next to connector
62. 6. Browser window opens → Sign in to your account
63. 7. Review permissions → Click "Allow"
64. 8. Return to Claude → Verify connection status

✓ **VERIFICATION: In Connectors settings, YouTube should show green "Connected" badge**

Step 4.6: Connect GitHub

Time Required: 3 minutes

65. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
66. 2. Navigate to "Connectors" in left sidebar
67. 3. Click "Browse connectors"
68. 4. Search for "GitHub"
69. 5. Click "Connect" next to connector
70. 6. Browser window opens → Sign in to your account

71. 7. Review permissions → Click "Allow"
72. 8. Return to Claude → Verify connection status

✓ **VERIFICATION: In Connectors settings, GitHub should show green "Connected" badge**

Step 4.7: Connect Canva

Time Required: 3 minutes

73. 1. Open Claude Desktop → Click profile (bottom-left) → Settings
74. 2. Navigate to "Connectors" in left sidebar
75. 3. Click "Browse connectors"
76. 4. Search for "Canva"
77. 5. Click "Connect" next to connector
78. 6. Browser window opens → Sign in to your account
79. 7. Review permissions → Click "Allow"
80. 8. Return to Claude → Verify connection status

✓ **VERIFICATION: In Connectors settings, Canva should show green "Connected" badge**

Step 4.8: Set Up Zapier MCP (For Unlisted Apps)

Time Required: 10 minutes

This allows you to connect ANY app not natively supported.

81. 1. Open browser → Navigate to zapier.com/mcp
82. 2. Sign up / Log in to Zapier account
83. 3. Click "Create new MCP server"
84. 4. Select "Claude Cowork" as client
85. 5. Search for apps you want to connect (e.g., Airtable, Trello, etc.)
86. 6. Toggle ON the apps and actions you need
87. 7. Click "Generate Server URL"
88. 8. Copy the URL (looks like: <https://zapier.com/mcp/server/abc123...>)
89. 9. Return to Claude → Settings → Extensions
90. 10. Click "Add Extension"
91. 11. Paste Zapier MCP URL
92. 12. Click "Connect"

✓ **VERIFICATION: In Extensions, Zapier MCP shows as active with list of connected apps**

Common Apps to Connect via Zapier:

- Airtable (database management)

- Trello (project management)
- Typeform (form responses)
- Mailchimp (email marketing)
- HubSpot (CRM)

6. PHASE 5: BUILDING CORE SKILLS

Skills are the automation building blocks. Create these foundational skills before building complex workflows.

Understanding Skill Structure

```
# SKILL NAME

## Purpose
[What this skill does]

## Inputs Required
[What information the user must provide]

## Process Steps
1. [Step 1]
2. [Step 2]
3. [Step 3]

## Connectors Used
- [Connector 1]
- [Connector 2]

## Output Format
[How the result is delivered]

## Examples
[Example usage]
```

7. PHASE 6: CREATING LIVE DEMO AUTOMATIONS

Now create the three main automation skills demonstrated in the presentation.

LIVE DEMO #1: Morning Brief Generator

Time Required: 15 minutes

What It Does:

Pulls Google Calendar events + Gmail summaries + News and creates a unified HTML dashboard every morning.

Copy this EXACT prompt into Claude Cowork:

Hey Claude, I want to create a comprehensive Morning Brief automation.

Here's exactly what I need:

NAME: morning-brief

WHAT IT DOES:

Every morning, pull together a beautiful HTML dashboard that gives me:

1. TODAY'S SCHEDULE

- Pull my Google Calendar events for today
- Show meeting times, titles, attendees
- Highlight any conflicts or back-to-back meetings
- Flag events that need prep work

2. EMAIL SUMMARY

- Scan my Gmail inbox (last 24 hours)
- Categorize emails:
 - * URGENT (needs reply today - clients, deadlines, \$\$\$)
 - * IMPORTANT (reply within 48hrs - partnerships, opportunities)
 - * FYI (just read, no reply needed)
 - * SPAM (promotional, can ignore)
- For URGENT emails: Extract key points + suggested actions
- Show unread count by category

3. TOP PRIORITIES

- Based on calendar and emails, suggest my top 3 priorities for today
- Include time estimates for each

4. AI NEWS DIGEST

- Search for "Claude AI news" OR "[your industry] news"
- Give me top 3 headlines with 1-sentence summaries
- Include links to articles

5. WEATHER & TIME

- Current weather in [YOUR CITY]
- Current time
- Sunrise/sunset times

OUTPUT FORMAT:

Create a beautiful, interactive HTML file that:

- Has a clean, modern design (white background, blue/orange accents)
- Shows all sections clearly organized
- Is mobile-responsive
- Includes clickable links for calendar events and emails

- Has a "last updated" timestamp

SAVE TO:

Cowork-OS/Outputs/morning-brief-[TODAY'S-DATE].html

TEST IT:

Once created, generate today's morning brief so I can see how it looks.

 **VERIFICATION: Run /morning-brief - HTML file should generate in Outputs folder with today's data**

LIVE DEMO #2: Email Triage System

Time Required: 15 minutes

What It Does:

Scans Gmail inbox, categorizes emails (urgent/spam/archive), and drafts replies in your tone directly in Gmail.

LIVE DEMO #3: YouTube Script Writer

Time Required: 20 minutes

What It Does:

Researches trending topics in your niche, structures outline with hooks, and writes full script optimized for retention.

See full prompts in the presentation slides. These are comprehensive multi-step automations.

8. PHASE 7: SCHEDULED TASKS SETUP

Now automate your skills to run on autopilot.

Schedule Morning Brief (Daily, 7 AM)

Hey Claude, I want to schedule the morning-brief skill to run automatically.

Schedule:

- Run every day at 7:00 AM (my timezone: [YOUR TIMEZONE])
- After creating the HTML dashboard, send me a Slack DM with:
 - * "Good morning! Your brief is ready 📊"
 - * Link to the HTML file
 - * Quick summary: number of meetings today + urgent emails count

Set this up now and show me the scheduled task.

 **CRITICAL: Computer must be ON and Claude Desktop must be OPEN for scheduled tasks to run**

Other Recommended Scheduled Tasks:

- Email Triage: Daily at 8 AM & 2 PM
- Downloads Cleanup: Daily at 11 PM
- Weekly Content Planning: Sundays at 6 PM

9. PHASE 8: MEMORY SYSTEM CONFIGURATION

Configure Claude's memory system to maintain context across sessions.

Understanding Memory Files

Each project folder has a Memory.md file that stores important information Claude should remember.

Memory Types:

- Project-specific: Stored in project folder's Memory.md
- Global: Stored in main Cowork-OS/Memory.md
- Built-in: Claude's native memory (Settings → Capabilities → Memory)

Memory Management Commands

Teach Claude these commands to manage memory:

```
"Remember this: [INFORMATION]"
→ Adds to Memory.md in current project

"Forget about: [TOPIC]"
→ Removes from Memory.md

"Update memory: [OLD INFO] → [NEW INFO]"
→ Replaces old information with new

"Show me what you remember about [TOPIC]"
→ Displays relevant memory entries

"Clear all memory for this project"
→ Wipes Memory.md (use with caution)
```

10. TROUBLESHOOTING & BEST PRACTICES

Common Issues & Solutions

Issue #1: "Claude can't access my Gmail/Calendar"

- Check Settings → Connectors → Gmail should show "Connected"
- If not connected: Click "Reconnect" and re-authorize in browser
- Check Google Account settings at myaccount.google.com/permissions
- Verify "Claude AI" has access - remove and re-add if needed

Issue #2: "Scheduled tasks aren't running"

Checklist:

- ☒ Is computer ON at scheduled time?
- ☒ Is Claude Desktop OPEN (even minimized)?
- ☒ Is internet connection active?
- ☒ Are connectors still authorized?
- ☒ Is there enough disk space?

Issue #3: "Skills don't execute correctly"

- Run skill manually first (not via schedule)
- Check error message - does it mention missing connector?
- Verify folder permissions - Can Claude write to the folder?
- Check skill file in Settings → Skills → [Skill Name] → Edit
- Test with simpler version of the skill

Best Practices for Long-Term Success

Weekly Maintenance (15 minutes every Sunday):

- Review scheduled tasks - are they still running correctly?
- Update Memory.md files with new learnings
- Clean up Outputs folder - archive old files
- Check connector permissions - re-authorize if needed
- Review skill performance - which ones are most useful?

Context Window Management:

- 30-45 minute focus sessions, then NEW task for next topic
- Store large documents in files, not chat
- Use specific, focused prompts
- Leverage skills to contain instructions

FINAL CHECKLIST

Before considering setup complete, verify ALL of these:

Installation & Setup

- ☒ Claude Desktop installed and logged in
- ☒ Sandbox folder created with proper structure
- ☒ Global Instructions configured
- ☒ Cowork-OS folder hierarchy established
- ☒ CLAUDE.md files created for each project

Connectors

- ☒ Gmail connected and tested
- ☒ Google Calendar connected and tested
- ☒ Google Drive connected
- ☒ YouTube connected (if applicable)
- ☒ Slack connected (if applicable)
- ☒ Zapier MCP configured (if needed)

Core Skills Created

- ☒ Morning Brief Generator
- ☒ Email Triage System
- ☒ YouTube Script Writer
- ☒ Content Repurposer (bonus)

Scheduled Tasks

- ☒ Morning Brief - Daily 7 AM
- ☒ Email Triage - Daily 8 AM & 2 PM
- ☒ Downloads Cleanup - Daily 11 PM
- ☒ Weekly Content Planning - Sunday 6 PM

Testing & Verification

- ☒ Each skill tested manually
- ☒ Each scheduled task verified
- ☒ Connectors tested with real data
- ☒ Output files saving to correct locations



EXPECTED TIME TO COMPLETE FULL SETUP

Total Time: 3-4 hours (broken into phases)

Phase Breakdown:

- Phase 1 (Installation): 15 minutes
- Phase 2 (Global Instructions): 20 minutes
- Phase 3 (Folder Structure): 20 minutes
- Phase 4 (Connectors): 30 minutes
- Phase 5 (Core Skills): 30 minutes
- Phase 6 (Live Demos): 90 minutes
- Phase 7 (Scheduled Tasks): 20 minutes
- Phase 8 (Memory System): 30 minutes
- Testing & Refinement: 30 minutes

Recommended Approach:

- Day 1 (1 hour): Phases 1-4 (Installation through Connectors)
- Day 2 (1.5 hours): Phase 5-6 (Skills creation)
- Day 3 (45 minutes): Phases 7-8 (Scheduling & Memory)
- Day 4 (30 minutes): Testing & optimization



YOU'RE NOW READY TO AUTOMATE EVERYTHING

Congratulations! You now have:

-  A fully automated Claude Cowork system
-  Morning briefs delivered automatically
-  Emails triaged and drafted for you
-  YouTube scripts generated on demand
-  Content repurposed across all platforms
-  A system that works while you sleep

Next Steps:

93. Use the system daily for 2 weeks
94. Note what works and what doesn't
95. Refine skills based on real usage
96. Add new skills as you identify repetitive tasks
97. Share your setup with team members



REMEMBER: The goal isn't to automate everything - it's to automate the repetitive tasks so you can focus on creative, strategic work that only you can do.

SUPPORT & RESOURCES

Official Resources:

- Claude Help Center: support.claude.com
- Claude Cowork Documentation: claude.com/docs/cowork

Community:

- Reddit: [r/ClaudeAI](https://www.reddit.com/r/ClaudeAI)
- YouTube: Automated Marketer channel