

QUICK GUIDE



10 Claude Cowork Tips for Marketers

Get Cowork working for your marketing workflow.

<> Before You Start: What You Need

A Pro, Max, Team, or Enterprise plan and the Claude Desktop app on macOS or Windows. Cowork isn't available on web or mobile — it needs the desktop app open and your computer awake while it works. Pick the tips that match your actual workflow; not every tip applies.

1



Brain File

One markdown file Claude reads at the start of every Cowork session.

Create a Claude Cowork folder with three subfolders: ABOUT ME, OUTPUTS, and one for whatever project you're working on. Inside ABOUT ME, write brand.md — your role, tone, deliverables, and constraints, kept under two pages.

Example: You stop re-explaining who you are, every single session.

Your Role & Company

Who you are and what you do

Tone Preferences

Voice, sentence length, banned phrases

Typical Deliverables

Newsletters, decks, briefs, recaps

Constraints

Style guide rules, brand voice notes

2



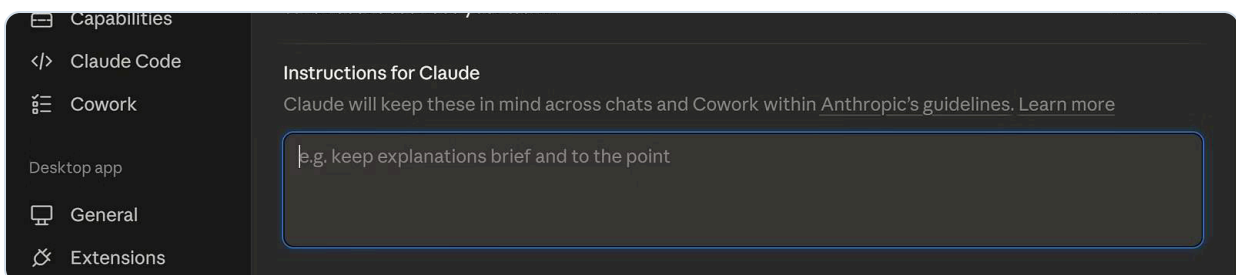
Global Instructions

Two layers of persistent instructions: global and folder-level.

Global instructions apply to every session — your name, company, default tone, "always write in active voice," a banned-phrases list. Folder instructions apply only inside one workspace, and Cowork can update them on its own during a session. Let it.

Where to find it: Claude desktop → Settings → Cowork → Global instructions → Edit. Folder instructions live in the folder's own instructions panel once you open it in Cowork.

Example: Set your global voice rules once, then let each client folder layer its own brand guide on top.



Get organized, then dispatch

Tips 3–4 of 10 — the demo that converts skeptics, and working from anywhere.



Organize My Mess

The demo that converts skeptics, including your own team.

Open Cowork in a real disaster folder — Downloads full of receipts, an uncleaned screenshots folder, meeting notes with no naming convention. Tell it: "Organize this folder. Group by type. Rename files using a clear convention. Move anything that looks like spam or duplicates to a subfolder called Review."

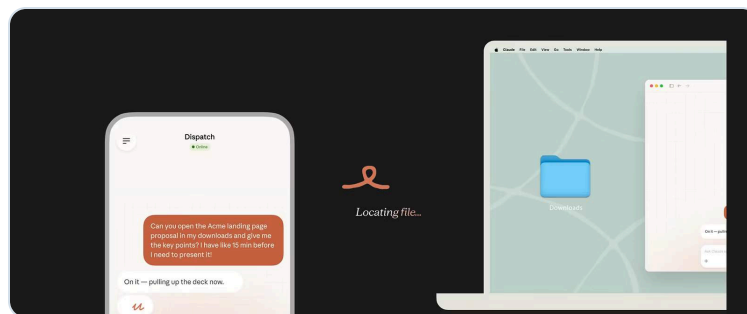


Dispatch

Message Claude from your phone while your desktop does the work.

Cowork's Dispatch feature lets you send a task from the mobile app while your desktop stays active. Your Mac or PC does the actual work; your phone just directs. This is how Cowork starts to feel like an actual coworker.

Where to find it: Claude desktop → Dispatch in the left sidebar → pair your phone. Then open the Claude mobile app and tap Dispatch to send tasks.



TRY THESE FROM YOUR PHONE

"Pull the notes from today's client call into a one-page recap and save it to OUTPUTS."

"Turn the draft in my Newsletter folder into three LinkedIn posts in my voice."

"Rename and sort everything I downloaded today, then tell me what's left."

Schedule it, keep it separate

Tips 5–6 of 10 — recurring work, and clean client-by-client workspaces.

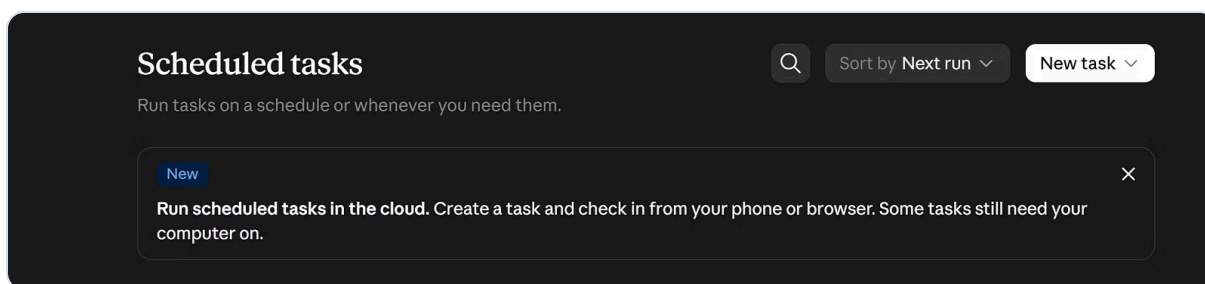


Morning Brief

/schedule sets up recurring work — while your laptop stays awake.

The most common pattern: a 7:30am brief that reads your email, Slack, and calendar, then drops a one-page summary into your Cowork folder. Scheduled tasks only run while your computer is awake and the desktop app is open — this isn't a cron job replacement.

Where to find it: Type `/schedule` in any Cowork task, or open Scheduled in the left sidebar → New task to set the time and frequency.

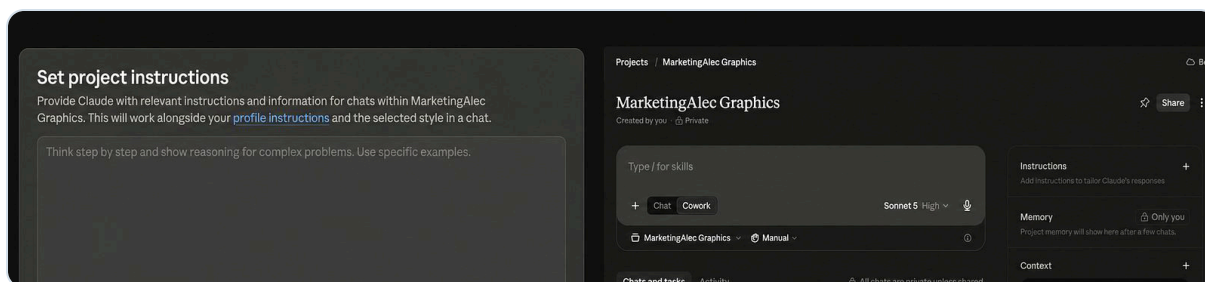


Projects

Separate workspaces per client, each with its own memory.

Projects group related tasks with their own files, context, instructions, and memory. Set up one project per client: Client A's brand voice never bleeds into Client B's draft, and handoffs to a teammate stay clean. Memory persists inside a project but not across ad-hoc sessions.

Where to find it: Left sidebar → Projects → New project. Add files and instructions from the project's side panel.



Wire up your real tools

Tips 7–8 of 10 — connectors and plugins turn Cowork into a coworker.

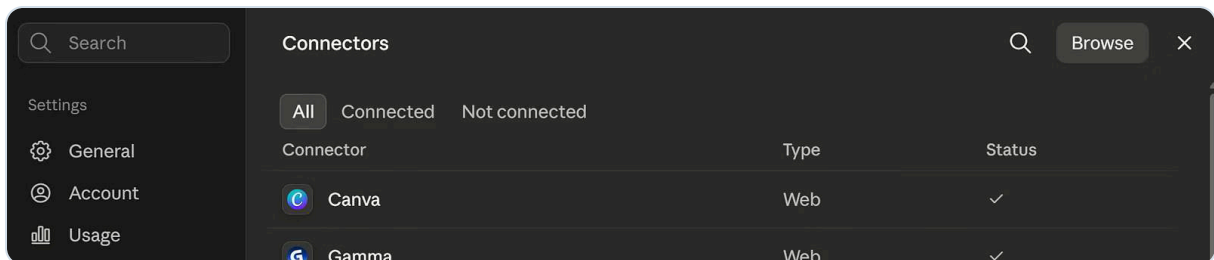


Connect Your Tools

Gmail, Slack, Calendar, and Notion — wired once, used everywhere.

Cowork's connectors are what make it feel like a coworker instead of a chatbot. Set them up once via the connectors panel: Claude can then read and triage your inbox, pull Slack threads, prep notes from tomorrow's meetings, and sync work back into Notion — no rewiring per task.

Where to find it: Settings → Connectors → Browse connectors, or click + in the message box → Connectors.

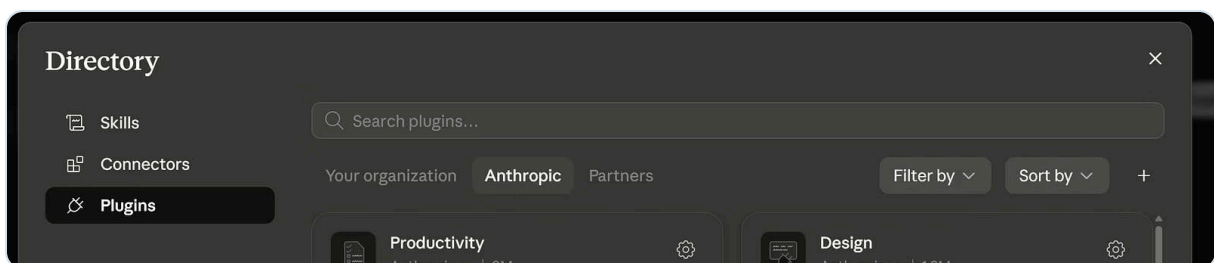


Install Plugins

Bundles of skills, connectors, and sub-agents — mini AI departments.

Plugins customize Cowork for your role, team, and company. Worth installing day one: a Research plugin (web search, summarization, report drafting), a Content Repurposing plugin (one asset → newsletter, social, blog), and a Data Analysis plugin. Browse community plugins too, but stick to well-rated, trusted ones.

Where to find it: Left sidebar → Customize → Plugins → Browse, then click Install on the one you want.



Ship real files, know the edges

Tips 9–10 of 10 — deliverables Cowork can build, and where it stops.

9



Excel & PowerPoint outputs

Ship the file, not the text.

Cowork generates Excel files with working formulas — VLOOKUP, conditional formatting, multiple tabs — and PowerPoint decks. Stop copying Claude's text output into a spreadsheet by hand.

DROP THIS IN

A folder of receipts

ASK FOR THIS

"Build an expense report as Excel with categories, totals, and a pivot table."

DROP THIS IN

Meeting transcripts

ASK FOR THIS

"Give me a PowerPoint summarizing key decisions, one slide per project."

10



Know what Cowork cannot do

Three limits, straight from Anthropic's docs.

Governance

Not captured in Audit Logs, Compliance API, or Data Exports. Regulated work belongs in Claude Code instead.

Sharing

Sessions can't be shared. Handing off to a teammate means exporting files manually.

Always-on

Needs your laptop open and awake. Anything that must run closed-lid belongs in Code Routines.

Quick start

- 1 Make the Claude Cowork folder: ABOUT ME, OUTPUTS, and one project folder.
- 2 Write brand.md — role, tone, deliverables, constraints. Keep it under two pages.
- 3 Set your global instructions once, then run "Organize My Mess" on a real disaster folder.
- 4 Connect Gmail, Slack, and Calendar, then schedule your first morning brief.



Your move this week

Build the brain file, then run "Organize My Mess" on your worst folder. That's the whole loop — everything else on this sheet compounds from it.