

M A V E R I C K A I

HOW TO SET UP CLAUDE COWORK

A STEP-BY-STEP BEGINNER'S GUIDE

Everything you need to turn Claude into a personal AI assistant that knows you, remembers your preferences, and works on autopilot.

What Cowork actually is (and isn't)

How to install and set it up from scratch

The two files that make the whole thing work

How to connect your email, calendar, and tools

Building workstations for different parts of your life

Skills, plugins, and scheduled tasks

Controlling it all from your phone

2026 Edition

What Is Claude Cowork?

You probably already use Claude as a chatbot. You type a question, it gives you an answer. That's great for quick stuff. But Cowork is different.

Cowork is a mode inside the Claude desktop app that turns Claude into an agent. Instead of just answering questions, it can actually do things on your computer: read your files, write documents, check your email, update your calendar, and more.

Chat vs. Cowork

	Regular Chat	Cowork
What you do	Ask a question, get an answer	Give it a goal, it delivers a result
Memory	Forgets everything between sessions	Remembers your preferences forever
Files	Can't touch your computer	Reads and writes files in your folder
Tools	No access to email, calendar, etc.	Connects to Gmail, Notion, Calendar, more
Automation	You have to be there for every message	Runs tasks on a schedule while you sleep

HOW IT ACTUALLY WORKS

Cowork runs in a loop: observe (read your files and tools), think (decide what to do), act (make the change). It keeps looping until the task is done. You give it a goal like 'triage my inbox and draft replies to the urgent ones,' and it handles every step without you watching.

The best part: the whole system runs on simple text files. No code. No technical setup. If you can type a sentence, you can build this.

Install Cowork

STEP 1: Download the App

Go to claude.ai/download. Download the Mac or Windows app. Install it and sign in.

STEP 2: Pick a Plan

Plan	Cost	Best For
Free	\$0	Testing it out
Pro	\$20/mo	Daily use (recommended starting point)
Max	\$100/mo	Heavy use, scheduled tasks, Opus model
Max 200	\$200/mo	All-day automation

STEP 3: Open Cowork Mode

In the Claude app, click the **Cowork** tab at the top. This switches you from regular chat mode into agent mode.

STEP 4: Create Your Folder

Open Finder (or File Explorer on Windows). Go to Documents. Create a new folder called **Cowork OS**.

This folder is your shared workspace with Claude. Everything you want Claude to work with goes in here. Everything you don't want it touching stays outside.

STEP 5: Connect Your Folder

Back in the Claude app, click **Select a folder**. Navigate to your new Cowork OS folder. Click Open. When it asks for permissions, click **Always Allow**.

STEP 6: Star It

Click the star next to your folder name. This makes Cowork always open to this folder by default. You won't have to re-select it every time.

STEP 7: Pick Your Model

Click the model selector in the top bar.

Model	When to Use It
Sonnet	Default for 80% of tasks. Fast and cheap on tokens.
Opus	Complex multi-step work where quality matters most.

Model	When to Use It
Extended Thinking	Toggle this on for tasks that need deep reasoning.

TIP

Start with Sonnet. It handles most tasks well and uses about a fifth of the tokens that Opus does. Only switch to Opus when the result from Sonnet isn't good enough.

The Two Files That Run Everything

Your entire Cowork system runs on two text files. That's it. Two files that sit inside your Cowork OS folder.

File	What It Does	Think of It As
claude.md	Your instruction manual for Claude. Who you are, how you work, what rules to follow.	The job description you hand a new employee on day one.
memory.md	Claude's notepad. Stores preferences, active projects, and things it should remember.	The employee's personal notebook they check every morning.

Without these files, Claude starts every session as a blank slate. It knows nothing about you. With them, it remembers your voice, your projects, your preferences, and your rules.

How They Stack

Your root folder has one `claude.md` and one `memory.md`. These are your global rules that apply to everything.

Later, you can create subfolders (called workstations) for specific areas like email, newsletter, or finances. Each workstation gets its own `claude.md` and `memory.md` with rules that stack on top of the global ones.

So when Claude writes an email, it reads your global rules first (your voice, your safety settings) and then reads your email-specific rules (greeting style, sign-off). The rules combine automatically.

TIP

Don't repeat the same rule in multiple files. If your root `claude.md` says 'never use corporate jargon,' don't restate that in your email workstation. Each level should only add new, specific rules.

Create Your claude.md

This is the most important step. You can either write this file yourself or have Claude build it for you. I recommend letting Claude do it.

STEP 8: Run the Interview Prompt

Open a new Cowork session. Paste this prompt:

PASTE THIS INTO COWORK

```
I'd like to create a claude.md file
that you'll read at the start of
every session. Ask me questions to
build it out. Include:

1. Who I am and what I do
2. How I want you to talk to me
3. Tools I use (email, calendar,
Notion, etc.)
4. Safety rules (never send, delete,
or publish without checking first)
5. A memory system (read memory.md
at session start, update it when
I correct you)

Keep the file under 300 lines.
```

Claude will ask you a series of questions. Answer naturally. It will generate your claude.md file and drop it in your folder.

STEP 9: Review What It Made

Open the claude.md file and read through it. Edit anything that doesn't feel right. Here's what should be in there:

Section	What Goes Here
Identity	Your name, role, business. (For you: Maverick Maltin, AI educator, @MavGPT, 1.3M+ followers)
Communication	How Claude should talk to you. Direct, plain English, no jargon. Challenge you when there's a better way.
Memory System	Read memory.md at session start. Update it when preferences change.
Routing Map	A table that maps task types to workstation folders. (We'll build these later.)
Safety Rules	Never send emails without approval. Never delete files without asking.

HEADS UP

Keep your root `claude.md` under 300 lines. Claude loads this file every single session. The longer it is, the more tokens you burn before you even start working.

Create Your memory.md

Without this file, Claude forgets everything between sessions. You'd correct it ten times and it would make the same mistake tomorrow.

STEP 10: Create the Memory File

PASTE THIS INTO COWORK

Create a memory.md file in my root folder with two sections:

1. Active Projects - what I'm working on with status and next steps
2. Memory - where you log preferences, corrections, and decisions

Add to claude.md that you must:

- Read memory.md before responding
- When I say 'remember this,' save it
- Replace outdated info in place
- Only save real corrections, not trivial details

STEP 11: Test It

Session 1: Tell Claude 'My newsletter goes out every Wednesday and Sunday. Remember that.'

Session 2: Start a new session. Ask 'When does my newsletter go out?'

If it answers correctly, your memory system is working.

TELL IT ABOUT YOUR PROJECTS

Right after setup, tell Claude your active projects. 'I'm currently working on: (1) a TikTok series on Claude, (2) my weekly newsletter, (3) the Maverick AI course. Add these to my active projects.' This gives it immediate context for everything you'll ask it to do.

Create Your Voice Profile

This makes Claude write like you instead of like a generic AI. You'll create a voice profile file that Claude references whenever it writes content for you.

STEP 12: Create a Resources Folder

Inside your Cowork OS folder, create a subfolder called **00-resources**. The '00' keeps it sorted at the top.

STEP 13: Extract Your Voice

If you've already connected Gmail (next chapter), use this prompt:

WITH GMAIL CONNECTED

```
Search my last 30 sent emails.  
Analyze my writing patterns:  
tone, sentence structure, greetings,  
sign-offs, phrases I use often,  
things I never say.  
  
Create a voice-principles.md file  
in my 00-resources folder.
```

No Gmail yet? Paste 5 writing samples into the chat instead (emails, social posts, newsletter drafts).

STEP 14: Tell claude.md to Use It

Add this line to your root claude.md:

ADD TO CLAUDE.MD

```
Before writing any content, read  
00-resources/voice-principles.md  
to match my writing style.
```

WHY THIS MATTERS

This way Claude only loads your voice profile when it's actually writing something, not on every session. Saves tokens and keeps things fast.

Connect Your Tools

By default, Claude can only read files in your folder. To make it useful, connect it to the tools you already use.

STEP 15: Open Connectors

Click **Customize** in the sidebar. Click **Connectors**. Click **Browse Connectors**.

STEP 16: Connect Your Tools

Tool	What Claude Can Do With It
Gmail	Read your inbox, draft replies, search threads
Google Calendar	Read events, create events, check availability
Notion	Read/write pages, search databases, update tasks
Google Drive	Read documents, create files, organize
Claude in Chrome	Browse websites, read pages, take screenshots

For each tool: click the + button, sign in with your account, and grant permissions. Start with read-only and expand as you get comfortable.

HEADS UP

Claude creates email drafts by default. It does NOT send emails unless you explicitly tell it to. Combined with your safety rules in `claude.md`, you always get a review step before anything goes out.

TIP

For Notion: create a `context-map.md` file in your `00-resources` folder that lists your key databases and pages with their URLs. This stops Claude from wasting tokens searching for the right database.

Build Workstations

Workstations are subfolders for specific areas of your life. Each one gets its own `claude.md`, `memory.md`, and `resources` folder.

STEP 17: Create Your First Workstation

PASTE THIS INTO COWORK

```
Create a workstation called Email HQ
inside my Cowork OS folder.

1. Create the subfolder with a
claude.md, memory.md, and empty
resources folder

2. Search my Gmail sent folder for
the last 4 weeks of emails

3. Extract email-specific patterns
(greetings, sign-offs, threading)
that are NOT in my root voice file

4. Add those to the Email HQ claude.md

5. Update my root claude.md routing
map so email tasks route here
```

Workstations to Consider

Workstation	Type	What It Handles
Email HQ	Universal	Inbox triage, drafting replies, follow-ups
Newsletter HQ	Dedicated	Maverick AI newsletter drafts, Kit integration
Content HQ	Dedicated	Video scripts, social captions, content calendar
Personal Finances	Dedicated	Expense tracking, budgets, credit card statements
Brand Deals	Dedicated	Sponsor outreach, rate cards, contract review

TIP

Start with two or three. Get used to how the files interact before building more. Only add a new workstation when you actually need one.

Create Skills

Skills are SOPs for AI. You explain a process once, turn it into a skill, and Claude runs it the same way every time without you re-explaining.

Two Ways to Make a Skill

Method 1: From Something You Just Did

Do the task with Claude. Go back and forth until you're happy. Then say:

AFTER DOING A TASK

```
Use your skill creator to create a
skill based on what we just did.
Package the whole process so next
time I just invoke the skill.
```

Method 2: From a Document

Upload a document that explains a process and say:

FROM SOURCE MATERIAL

```
Turn this into a reusable skill
that follows the exact methodology
described.
```

Skills to Build First

Skill	What It Does	Frequency
Morning Brief	Summarizes inbox, calendar, and project updates	Daily
Newsletter Drafter	Takes rough talking points, creates a full draft	2x/week
Session Audit	Scans conversation for unsaved preferences	End of session
Social Caption Writer	Writes captions for multiple platforms	Daily
Inbox Triage	Categorizes emails, drafts replies for urgent ones	Daily

Plugins

Claude comes with built-in skills for making Word docs, spreadsheets, presentations, and PDFs. You don't need to set those up. Just ask and it uses them.

Plugins go further. They're pre-built specialist tools from a marketplace.

STEP 18: Browse and Install

Go to **Customize > Personal Plugins > Add Plugin > Browse Plugins**. Install anything that matches your needs. Then customize it:

CUSTOMIZE A PLUGIN

```
I just installed the [plugin name]
plugin. Customize it for my business.

I'm Maverick Maltin, AI educator
with @MavGPT. I sell PDF guides,
courses, and consulting.
```

TIP

The skill creator is already built into Cowork. Turn it on in **Customize > Skills > Examples**. Then you can say 'create a skill for what we just did' after any process and Claude packages it up automatically.

Scheduled Tasks

This is where Cowork starts working without you. Scheduled tasks run automatically on a timer using everything you've set up.

Only requirement: your computer needs to be on and connected to the internet.

STEP 19: Create a Scheduled Task

Click **Scheduled** in the sidebar. Click **New Task**. Write instructions. Set the schedule.

Tasks to Set Up

Task	Schedule	Instructions
Morning Briefing	Weekdays 7 AM	Check Gmail, Calendar, and Notion tasks. Summarize what's important. Send me an email.
Inbox Triage	Weekdays 9 AM	Search inbox for unread emails from last 12 hours. Categorize by priority. Draft urgent replies.
Weekly Review	Fridays 4 PM	Summarize what I accomplished, what's overdue, and what's next week.
Newsletter Prep	Tues & Sat 8 AM	Search trending AI news. Check my content calendar. Outline my next newsletter.

HEADS UP

Scheduled tasks use tokens from your plan. Start with two or three tasks and watch your usage before adding more.

Dispatch: Phone Control

Dispatch lets you control your Claude desktop from the Claude mobile app. You text it from your phone and it runs on your Mac at home.

STEP 20: Enable Dispatch

In the Claude desktop app, click **Dispatch** in the sidebar. Enable it. You can also enable **Computer Use** to let Claude interact with apps on your Mac.

EXAMPLE DISPATCH MESSAGES

Check my inbox and tell me if anything urgent came in today.

Search my Notion for the next newsletter draft and tell me what topics I have planned.

Create a draft reply to [person] about [topic] and put it in my Gmail drafts.

THE ALWAYS-ON SETUP

Consider a Mac Mini that stays on at your desk. Enable 'prevent sleep' in Cowork settings. Your scheduled tasks run on that machine while you're out filming, traveling, or sleeping. Check results from your phone via Dispatch.

The Session Audit Habit

At the end of every session, run a session audit. This one habit saves hours over time.

END OF EVERY SESSION

Audit this session. Look for:

1. Preferences I stated that aren't saved in memory.md yet
2. Corrections I made that should be remembered
3. Project updates to log
4. New rules for any claude.md file

Update the files and tell me what you saved.

Turn this into a skill so you can just say 'audit this session' and it runs automatically. Every preference saved is one fewer correction next time.

THE COMPOUNDING EFFECT

Turn three to five manual processes into skills each week. Within a month, you'll have 15-20 skills handling your routine work. Within three months, most repetitive tasks are on autopilot. The system gets better every single session.

Common Mistakes

Mistake	Do This Instead
No claude.md file	Create it before doing anything else. Without it, Claude knows nothing about you.
No memory.md file	Set it up right after claude.md. Otherwise corrections are forgotten between sessions.
Building 20 workstations on day one	Start with 2-3. Add more only when you need them.
Putting everything in claude.md	Keep it under 300 lines. Use resource files for detail.
Using Opus for everything	Default to Sonnet. Switch to Opus only for complex tasks.
Not running session audits	Audit at the end of every session so preferences stick.
Repeating rules across workstations	Root rules apply everywhere. Workstations only add new ones.
Too many permissions at once	Start read-only. Expand as you build trust.

Your First Week

Day	What to Do	Time
Day 1	Install Claude, create Cowork OS folder, build claude.md and memory.md	45 min
Day 2	Connect Gmail, Calendar, and one other tool. Create your voice profile.	30 min
Day 3	Build your first workstation (Email HQ). Test it by having Claude triage your inbox.	30 min
Day 4	Build a second workstation (Newsletter HQ or Content HQ).	30 min
Day 5	Create your first skill from a process you did this week.	20 min
Day 6	Set up your first scheduled task (morning briefing). Install a plugin.	20 min
Day 7	Review everything. Clean up files. Run a full session audit.	30 min

Your Folder Structure

Here's what your Cowork OS folder looks like after the first week:

FINISHED STRUCTURE

```
Cowork OS/  
  claude.md  
  memory.md  
  00-resources/  
  voice-principles.md  
  context-map.md (optional)  
Email HQ/  
  claude.md  
  memory.md  
  resources/  
Newsletter HQ/  
  claude.md  
  memory.md  
  resources/  
Content HQ/  
  claude.md  
  memory.md  
  resources/  
Outputs/
```

Each workstation is self-contained with its own rules, memory, and resources. Root-level files apply everywhere. Workstation files add specifics for that area.

START NOW

Open the Claude desktop app. Create your Cowork OS folder. Run the claude.md interview prompt from Step 8. You'll have a working assistant before lunch.

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Build the system once. Let it compound forever.