

FOLLOW ME FIRST

How to Set Up Claude Cowork the Right Way

So it actually does your work while you step away.

WHAT YOU'LL SET UP IN 30 MINUTES:

- 1 File System Access** — Claude reads and writes to your actual computer
- 2 AskUserQuestion** — Forces clarity instead of guessing
- 3 Plugins** — Specialist packs for your exact role
- 4 Instructions** — Permanent memory that loads every session
- 5 Connectors** — Live integrations with Slack, Drive, Notion & 50+ tools

ChatGPT trained you to write better prompts.

Cowork trains you to build better context. One compounds.

Adapted for Azione AI by Adam Zell

Founder & CEO, Boston Automations

adam@bostonautomations.com | AzioneAI.bostonautomations.com

ORIGINAL AUTHOR

Based on the guide by [Nav Toor \(@heynavtoor\)](#) — 11M+ views on X. Adapted for the Azione Unlimited community by Adam Zell.

COWORK IS NOT A CHATBOT

It's something else entirely.

Most people think Claude is like ChatGPT. A text box. You type, it responds. That's claude.ai — the browser version.

Claude Cowork is different. It lives on your desktop. It reads and writes to folders on your actual computer. It creates Word documents. It builds spreadsheets with working formulas. It installs specialist plugins for your exact job. And when it doesn't have enough information, it asks you — instead of guessing.

Cowork is what happened when Anthropic took the power of Claude Code — their agentic developer tool — and rebuilt it for the rest of us. No terminal. No command line. No code. Just: describe the outcome you want, point it at your files, and step away.

The Loop:

Describe what you need > Cowork asks questions > You answer > Come back to finished work

This loop now covers about 60% of knowledge work for power users.

1. FILE SYSTEM ACCESS

Claude reads and writes files in a folder on your computer.

Every other AI tool runs on uploads. You export a file. You drag it into the chat. You wait. You get an output. You download it. You put it back.

Cowork eliminates that entire loop. You select a folder on your computer. Claude reads everything inside it. When it creates something, it saves directly to that folder. No manual steps.

How to set it up:

- 1 Go to **claude.com/download**. Download the desktop app (macOS or Windows x64).
- 2 You need a paid plan. Pro is \$20/month. Max starts at \$100/month for heavier usage.
- 3 Open the app. At the top, you'll see a toggle. Switch to the **Cowork tab**.
- 4 Click the folder icon or "Select Folder" and choose a local folder from your computer.
- 5 Everything in that folder is now readable by Claude for the duration of your session.

Pro Tip: The Context Files Strategy

Stop thinking about better prompts. Start thinking about better files. Create a folder called "Claude Context" with three files:

- **about-me.md** — who you are, what you do, your role, what success looks like
- **brand-voice.md** — how you communicate. Your phrases. What sounds wrong to you.
- **working-style.md** — how you like Claude to behave. Questions first? Short or long outputs?

The more quality context you give Claude in these files, the less prompting you need. These files compound over time.

YOUR FIRST PROMPT

"Read all the files in this folder completely. Then give me a summary of what you know about me, how I work, and what context you have access to."

2. ASKUSERQUESTION

Cowork asks YOU questions instead of guessing and getting it wrong.

Here's what every other AI does when you give it an unclear task: it guesses. Confidently. It picks an interpretation, runs with it, and gives you a polished output that answers the wrong question.

Cowork does something different. When it needs more information, it stops and generates a form. Multiple-choice questions. Specific options. A structured prompt that helps you think through what you actually want.

How to use it:

Add this line to the end of any prompt:

APPEND TO ANY PROMPT

"DO NOT start working yet. First, ask me clarifying questions so we can define the approach together. Only begin once we've aligned."

YOUR FIRST PROMPT — DEFAULT OPENER FOR ANY TASK

"I want to [YOUR TASK] so that [WHAT GOOD LOOKS LIKE]. First, read all uploaded files completely before responding. DO NOT start executing yet. Ask me clarifying questions (use AskUserQuestion) to refine the approach. Only begin work once we've aligned."

The mindset shift:

ChatGPT trained you to write better prompts. **Cowork trains you to give better context. One is a skill that depreciates. The other compounds.**

3. PLUGINS

Pre-built specialist packs that make Claude an expert instantly.

Without a plugin, Claude Cowork is a brilliant generalist. Plugins change that. They're bundles of skills, slash commands, and sub-agents designed for specific job functions.

Productivity

Tasks, calendars, daily workflows

Marketing

Content, campaigns, brand voice

Sales

Account research, outreach, battlecards

Finance

Modeling, analysis, reporting

Data Analysis

SQL, dashboards, exploration

Legal

Contract review, research, drafting

Product Mgmt

Specs, roadmaps, user stories

Customer Support

Tickets, response drafting

How to install:

- 1 Open Claude Cowork.
- 2 Click the "+" button in the chat bar, then click "Plugins" to browse.
- 3 Or go to claude.com/plugins to see everything available.
- 4 Pick the plugin that fits your role and click Install.

5 Type "/" in any Cowork chat to see the slash commands that plugin adds.

4. INSTRUCTIONS (GLOBAL & FOLDER)

Permanent memory that loads automatically at the start of every session.

Cowork has no memory between sessions. Every time you open a new conversation, Claude starts fresh. This frustrates people most — until they discover Instructions.

Instructions are standing orders you write once. They load automatically at the start of every Cowork session. Global instructions apply everywhere. Folder instructions apply when you select a specific local folder.

How to set up Global Instructions:

- 1 Go to **Settings > Cowork** in the Claude desktop app.
- 2 Click "Edit" next to Global Instructions.
- 3 Write what you want Claude to always know. Save.

What to put in global instructions:

- Your name, role, and what you do ("I'm a freelance brand strategist working with DTC founders")
- Your communication preferences ("I prefer concise, direct outputs — no padding, no filler")
- Your output defaults ("Always save documents as .docx unless I say otherwise")
- Your working style ("Always ask clarifying questions before starting any task")
- Things to avoid ("Never use bullet points unless I specifically request them")

Folder instructions work the same way but are project-specific. Each client folder can have its own brief that Claude loads automatically. Every session with that client starts with full context.

YOUR FIRST PROMPT

"Before we start any work, tell me what you know about me, how I like to work, and any standing preferences you're aware of."

5. CONNECTORS

Live integrations with Slack, Drive, Notion, and 50+ other tools.

The typical AI workflow involves a lot of copy-pasting. You screenshot your Slack thread. You copy the doc. You paste it into the chat. Connectors eliminate all of that.

Link your tools once, and Claude can reference live data from them mid-conversation. No copy-pasting. No screenshots. No downloads. This is free on all plans and is the most underused feature in Cowork.

How to connect your tools:

- 1 Go to **Settings > Connectors** in Claude Desktop.
- 2 Browse the directory (50+ integrations including Slack, Google Drive, Notion, Figma, Asana, and more).
- 3 Click a connector and hit "Add."
- 4 Authenticate with that tool. Done.

You only do this once. After that, Claude can access live data from that tool in every Cowork session.

YOUR FIRST PROMPT (AFTER CONNECTING SLACK)

"Search my Slack messages from the last 7 days and give me a summary of anything I need to follow up on. Organize by urgency."

AFTER CONNECTING GOOGLE DRIVE

WHERE COWORK FALLS SHORT

It's the best AI tool for knowledge work. It is not perfect.

No cross-session memory.

Every new session starts fresh. Workaround: keep your context in markdown files and set solid global instructions. Document important decisions in files Claude can read.

Tasks stop if you close the app.

If you quit the app, the task stops mid-execution. Put your computer to sleep instead — the session survives that.

Usage goes faster than regular chat.

Complex tasks consume more of your monthly allocation. If you're on Pro and doing heavy daily use, Max (\$100-\$200/month) may be worth it.

Desktop only. No mobile. No sync.

No iPhone. No browser version. Build your context files in a cloud-synced folder (iCloud, Dropbox, Google Drive) so files are consistent.

It doesn't generate images.

Use Gemini Imagen for images. Keep Cowork for documents, spreadsheets, presentations, and research.

It's a research preview.

Agent safety is still under development. Enable deletion protection in settings and review plans before executing on anything sensitive.

YOUR FIRST 30 MINUTES WITH COWORK

Block 30 minutes on your calendar. Here's exactly what to do.

MIN 0-5 INSTALL

Go to claude.com/download. Download the desktop app. Sign in or create an account. Get Pro (\$20/month). Open the app. Find the Cowork tab. You're in.

MIN 5-10 CREATE CONTEXT FILES

Open a text editor. Create `about-me.md`, `brand-voice.md`, and `working-style.md`. Save in a folder called "Claude Context." Pro tip: use voice-to-text to dictate these files.

MIN 10-15 SET GLOBAL INSTRUCTIONS

Settings > Cowork > Edit Global Instructions. Paste key highlights from your three files: who you are, how you communicate, how you want Claude to work. Save.

MIN 15-20 RUN YOUR FIRST TASK

Select your "Claude Context" folder. Type: "Read all files. Then help me [your task]. Ask me clarifying questions first." Watch what happens. Iterate.

MIN 20-25 INSTALL A PLUGIN

Click "+" > Plugins. Pick one for your role: Productivity, Marketing, or Sales. Type "/" to see slash commands. Try one and compare to generic prompts.

MIN 25-30 CONNECT ONE TOOL

Settings > Connectors. Connect Slack, Google Drive, or Notion. Authenticate. Then ask Claude something about that tool. Watch it pull live data. **That's the moment it clicks.**

THE REAL REASON TO SWITCH

The people getting the most from AI aren't the ones with the cleverest prompts. They're the ones who built systems.

Files that store their context. Instructions that persist across sessions. Plugins that specialize their tool. A setup that gets better every week.

Cowork is what makes that system possible for knowledge workers. And it's worth the 30 minutes to set it up.

ChatGPT trained you to write better prompts.

Cowork trains you to build better context.

QUICK REFERENCE LINKS

Download Claude Desktop claude.com/download

Browse Plugins claude.com/plugins

Aziona AI Resource Hub AzionaAI.bostonautomations.com

Original Guide by Nav Toor (@heynavtoor) x.com/heynavtoor

PROMPT CHEAT SHEET

Copy these prompts word-for-word to get started.

FIRST SESSION

"Read all the files in this folder completely. Then give me a summary of what you know about me, how I work, and what context you have access to."

ANY TASK OPENER

"I want to [YOUR TASK] so that [WHAT GOOD LOOKS LIKE]. First, read all uploaded files completely. DO NOT start executing yet. Ask me clarifying questions to refine the approach."

SLACK RECAP

"Search my Slack messages from the last 7 days and give me a summary of anything I need to follow up on. Organize by urgency."

VERIFY INSTRUCTIONS

"Before we start any work, tell me what you know about me, how I like to work, and any standing preferences you're aware of."

ORIGINAL AUTHOR & CREDIT

This guide was written by **Nav Toor (@heynavtoor)** and adapted for the Aziona Unlimited integrator community by Adam Zell. Follow Nav on X for more AI workflow guides.

Adam Zell

Founder & CEO, Boston Automations

