

Claude Cowork Quick-Start Guide for Publishers

From download to your first repeatable skill

Claude Cowork lets you connect Claude to your files and tools, complete multistep work, save the process as a reusable skill, and schedule it. The setup takes some thought, but a well-organized system can save hours every week.

Your six step setup

1. Install the desktop app and choose a model.
2. Create a dedicated Claude folder in Google Drive or Microsoft OneDrive.
3. Add short global instructions, including safety rules and your folder map.
4. Connect the tools Claude needs, beginning with Drive, email, and calendar.
5. Run one simple workflow, improve it, and save it as a skill.
6. Create an artifact when you want a small app or interactive tool rather than an automated action.

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Install Claude

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**Create an
artifact**

STEP 1

Install Claude on your desktop

1. Go to claude.com/login, choose Download, and install the Mac or Windows desktop app. To install on tablets and mobile, download from the App Store.
2. Start with Claude Pro if you are new to Cowork. The cost is \$20 a month and good for about 5 hours of work. Move up to a higher-usage plan only if you consistently need it.
3. Open the desktop app and choose Home. Use Sonnet for everyday work; reserve Opus for more demanding reasoning.
4. Check Settings and Usage whenever you want to see your current usage.

Know the basic pieces

TERM	WHAT IT DOES
Folders	Give Claude a clear home for company information, examples, skills, and outputs.
Chat	Tell Claude what to do and refine the work.
Connectors	Give Claude access to Drive, email, calendars, spreadsheets, WordPress, and other tools.
Skill	Save a repeatable workflow that Claude can run again.
Schedule	Run a saved skill daily, weekly, monthly, or on another cadence.
Artifact	Create a lightweight app, calculator, dashboard, or interactive tool.

STEP 2

Create your Claude folder

Create one clearly named folder in Google Drive or Microsoft OneDrive, such as Claude Folder. This gives Claude a defined place to look first instead of roaming across your entire Drive.

Start with four subfolders

About Us: Company background, audience, value proposition, executives, website copy, URLs, and the tone you use.

Skills: Skill instructions, memory rules, reference files, and documents that govern how recurring workflows behave.

Style Guide: This is the writing guide. Include your best emails, newsletters, articles, sales letters, project briefs,

Sales: Rate cards, media kits, value propositions, objections, analytics, promotions, and approved sales messages.

Brand Guidelines: Always helpful to have your logo, fonts, and other styles guides in one place.

Create some consistent subfolders within folders. Examples: **sources, templates, working, and outputs.**

- **Sources:** Information Claude will read—survey data, interviews, publisher examples, background documents.
- **Templates:** Approved structures Claude should copy—newsletter format, article structure, sales-letter template.
- **Working:** Drafts and temporary materials that may change or be discarded.
- **Outputs:** Completed, reviewed work ready to publish, send or share.

Don't force all four folders everywhere. A small reference area such as **Company Information** may only need documents. A **Brand** folder might only need Sources and Templates.

The folder/subfolder organization can look like this:

Company

- |— About us
- |— Brand
- |— Sales
 - | |— Sources
 - | |— Templates
 - | |— Working
 - | |— Outputs
- |— Marketing
 - | |— Sources
 - | |— Templates
 - | |— Working
 - | |— Outputs
- |— Editorial
 - | |— Sources
 - | |— Templates
 - | |— Working
 - | |— Outputs
- |— Research
- |— Skills
 - | |— Rules
 - | |— Memory

Ask Claude to connect and create these folders for you.

Since Skills Folder rules will always be sourced when running a skill, create these two documents within that folder:

CUT AND PASTE Skill file rules

- If a skill cannot update a file in the normal way, stop and tell [name]. Never silently create a substitute file.
- A skill that maintains an ongoing tracker or log should use the exact file ID built into its instructions. Never search by name or create a replacement “just in case.”
- Save new documents in the matching subfolder under Claude Folder. Ask only if no folder clearly fits or the naming is unclear.
- Before creating a new document or spreadsheet, check whether one already covers the work and update it instead of duplicating it.
- If a skill does not say whether to reuse a spreadsheet or start a new one, ask [name]. Then save the answer in the skill.
- Before creating a new skill or reference document, check the Skills folder for one that already covers it.

CUT AND PASTE Create the memory file

Create a document titled MEMORY LOG — [Company] Cowork Sessions in Claude Folder > Skills.

This is the running record of what Claude and [name] work on together. At the end of each session, add a dated entry covering what we worked on, decisions made, open items, and where to pick up next time. Always append a new entry. Never rewrite or delete an older entry.

This is the one and only memory file. Always update this exact document. Do not create a new Memory document or search and recreate one.

When the document contains roughly 90 days of entries or becomes slow to read, archive older entries in a new document titled Memory Archive — [date range] in the Skills folder. Get [name]’s approval before removing anything from the live document.

STEP 3

Give Claude short global instructions

Global instructions are the rules Claude reads before every request. Keep this list short: who you are, what Claude should never do without permission, and which files it should read for specific kinds of work.

To find them, select your name at the bottom of the left navigation, then Settings, then Instructions.

CUT AND PASTE Global instructions

A. Use this folder map first

Work from Claude Folder and use these subfolders: About Us, Skills, Style Guide, Brand, Marketing, and Sales.

Before creating a new folder, check whether the right folder already exists.

B. Read at the start of every session

- Read the About Me document in Claude Folder > About Us for background on [name], [company], and the tone to use in our conversations.

C. Read when relevant to the task

Before creating editorial-related content, read Claude->**Style guide**->relevant files in **Claude/Styles/Templates**. Save unfinished work in **Style guide/Working** and completed work in **Style guide/Outputs**

Before creating sales-related content, read Claude->**Sales**->**Sources** and relevant files in **Sales/Templates**. Save unfinished work in **Sales/Working** and completed work in

* When asked to create branding, read Claude Folder->Brand.

- When continuing prior work or when I refer to a past session, read the Memory document in Claude Folder > Skills. When creating, updating, or saving a skill read Claude->skills->rule document.

files in **marketing/Templates**. Save unfinished work in **marketing/Working** and completed work in **Marketing/Outputs**

Add a dated entry to the Memory document in Claude Folder > Skills: what we worked on, decisions made, open items, where to pick up next time, and the chat conversation. Archive conversations more than 90 days old. Always append. Never rewrite or delete an older entry.

E. Global rules

- Never delete, send, or publish anything without [name]'s explicit approval.
- Wait for an explicit "go" before starting a task. Confirm the plan first.
- Speak up when you see a simpler or better approach.
- Before creating a Drive folder, check whether it already exists. Ask if unclear.

* Use these subfolder definitions:

- **Brand:** Voice, style, logos, colors, and approved brand language.
- **Sources:** Existing information and evidence to use for work.
- **Templates:** Approved examples to copy and structures to follow.
- **Working:** Drafts, notes, and unfinished work.
- **Outputs:** Completed work ready for review, publication or use.

Tip: Global rules should contain only what Claude needs to know every time. Otherwise, point to relevant folders/subfolders for Claude to find context, details, & examples.

STEP 4

Connect Cowork to your workspace

Begin with the three connections most publishers use every day:

1. Google Drive or Microsoft OneDrive, so Claude can find folders, drafts, spreadsheets, and reference files.
2. Your primary email account. If you have more than one, connect the one you use most first.
3. Your calendar, so Claude can help you prepare for meetings and review what is coming next.

You can find additional connectors under Customize or under Settings and Customize. Available integrations change, but include Microsoft 365, Brevo, HubSpot, Slack, Notion, Atlassian, Figma, Zoom, GitHub, WordPress, QuickBooks, and a read/write connection to Mailchimp at the time of this writing. Otherwise, use Composio (for platforms like Constant Contact) or Zapier. Ask Claude how to connect.

CUT AND PASTE Quick connection test

Check my inbox and calendar. Tell me what matters tomorrow. Do not send, delete, or change anything.

STEP 5

Build your first skill

Choose a small administrative task that repeats. Build and test one step at a time. Once the workflow works reliably, ask Claude to save it as a skill.

CUT AND PASTE Plan the workflow without running it

Do nothing yet. Help me design a repeatable workflow for [task]. Tell me what information, folders, files, and connectors you would need; what steps you would take; where the output should be saved; and which actions should require my approval.

CUT AND PASTE Run and refine it

Stop so I can review it before you continue.

CUT AND PASTE Save it as a skill

Save this workflow as a skill named [name].

Good first skills for publishers

- Draft curated news, post edited version to ESP and CMS.
- [Turn advertisers' news into sales leads](#)
- Connect to Zoom and turn the transcript into a first-draft article.
- [Build an AI-powered sales team.](#)
- Turn an approved article into a newsletter and social content, post approved outputs.
- [Mine Autoresponders for list-building and cleaning](#)

When a skill works consistently, ask Claude to schedule it. Find saved skills under Settings > Customize > Skills.

STEP 6

Create an artifact: A shareable tool

A skill performs a repeatable action. An artifact is a thing people can use: a calculator, dashboard, scorecard, proposal builder, or other lightweight app. Artifacts can be shared by link with your team or audience.

Useful artifact ideas

Advertiser proposal builder: Enter an advertiser type, budget, and goal; receive a recommended package.

Sales call briefing tool: Enter a prospect's information; receive questions, talking points, potential offers, and follow-up letters using additional information from the web.

Content repurposing tool: Paste an article; receive newsletter copy, social posts, headlines, and video scripts.

Revenue calculator: Model the effect of changes in price, frequency, open rate, or sell-through.

Benchmark explorer: Let readers filter survey data by business model, audience size, market, or geography.

CUT AND PASTE Start an artifact

Use [content url or source folder] to create a simple interactive [calculator/tool] for [audience]. Users will enter [inputs] and receive [output]. Before building it, do nothing and propose the fields, calculations, user flow, and design. Make clear which content or data files in Claude Folder the artifact should use.

Share a skill with the team on their own Claude account.

Instead of an enterprise edition, team members can access folders, and set up skills in their own account.

Tell Claude to find the skill's files (each skill is a folder containing **SKILL.md**, plus any supporting scripts/resources), Zip that folder up, or just send the **SKILL.md** file if it's a simple, single-file skill.

Send it to the other person (email, Slack, shared drive — whatever you'd normally use).

They add it in their own Claude by uploading/installing that skill folder the same way.

Troubleshooting

Claude is slowing down and getting confused.

Every time Claude must search for a folder, compare several files, or guess which version is correct, this adds extra steps. Always ask Claude for help. Most of the time, however, the problem can be solved by cleaning up folder organization and linguistics, and updating the global rules.

Here are some common issues and solutions:

- * **Claude can't find the folder.** Review global instruction, add new context folders and change instructions and/or naming protocols to clearly point Claude to the right folder. Move data placed in the wrong folder.
- * **Claude creates multiple versions of subfolders and docs with each revision.** Check the skills rules that prevent this. Rewrite the skills rules so Claude edits rather than creates new versions. Tell Claude to select the most recent version and delete the older ones.
- * **Claude saves to your drive outside the Claude folder.** Skills rules should prevent this. Rewrite rules to save outputs in Claude->correct folder and ask if it does not see a folder.
- * **[Claude.me](#) memory of conversations is selective.** Check that the memory skill saves 90 days as a doc in Skills folder. Always start a new conversation for any new topic.
- * **Claude asks for permission too many times:** Claude starts asking to access external websites in your folders, requiring the user to be present during the run. Go to: your name-> Settings-> Capabilities-> Domain allow list-> all domains.
- * **Claude stalls when creating a skill from the prompt.** Stop the run. Break the prompt into steps, test one at a time, and test smaller data sets before the full run.
- * Claude stalls on a simple request (just a question, not running a skill) or delivers a low-quality result. If you need a simple answer that relies on researching the internet or creating visual formatting, switch to GPT. Put the results into chat, save them into the right folder at the end.
- * Claude takes too long running a skill. Ask Claude how to shorten the run time.