

Claude Cowork: From Zero to Productive

The fundamentals to get started without wasting time

Florian BRUNIAUX

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CLAUDE
CODE

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Who is this whitepaper for?

Primary audience: SMB owners, tradespeople, shop owners, managers

Prerequisites: None — this is the entry point for the whole series

Reading time: 15 min

What you'll take away:

- Cowork acts on your local files, it doesn't just answer questions
- The CTOC framework (Context, Task, Output, Constraints) structures every interaction
- A dedicated folder plus a few simple rules prevents 90% of problems

In 5 lines: Claude Cowork is not an enhanced chatbot. It is an assistant that can read your files, create Word and Excel documents, extract data from invoice photos, and chain complex actions together — without you writing a single line of code. The difference from a standard assistant: it acts, it doesn't just suggest. This guide explains how to move from “I tried it once” to “I use this every day and it saves me 2 hours a week”.

1 What is Claude Cowork

Most professionals who try Cowork make the same mistake in the first few weeks: they ask it questions the way they would Google, get correct but underwhelming answers, and conclude that it is “useful but not revolutionary”. This guide exists to prevent that.

Claude Cowork is Claude’s desktop feature for professionals who don’t write code. In one sentence: **an assistant that can act on your local files, create professional documents, extract data, and automate repetitive tasks – all without code, straight from your desktop.**

Feature	Description
Local	Your files stay on your machine; Cowork accesses them with your permission
Agentic	It plans and executes sequences of actions, not just text
No code	No technical skills required
Extensible	11 official plugins to connect your existing tools

Cowork != Claude.ai chat

Claude.ai (Chat tab): answers your questions in the browser, no access to your local files.

Claude Cowork (desktop feature): reads and writes files on your machine, creates documents, runs multi-step workflows.

If you see no difference from what you were doing before, you are probably using it like a chatbot.

1.1 What Cowork can do

Organised by business use case:

Administrative management

- Generate invoices and quotes from your data
- Extract amounts and suppliers from invoice photos (OCR)
- Create expense tracking spreadsheets from scanned receipts
- Generate payment reminders at the right tone level (1st, 2nd, final notice)

Sales and prospecting

- Research information on prospects (company number, turnover, directors)
- Analyse Google and Trustpilot reviews from your competitors
- Create PowerPoint presentations for client meetings
- Manage a client tracker in an automatically updated Excel sheet

Organisation

- Sort and rename 200 files in seconds according to your rules
- Prepare a meeting by compiling the relevant information
- Archive folders in a consistent structure
- Document procedures to onboard a new team member

Communication

- Write LinkedIn, Facebook, or Instagram posts adapted to each platform
- Reply to Google reviews adjusting tone based on the star rating
- Create a structured monthly newsletter
- Audit your website and identify areas for improvement

1.2 What Cowork cannot do

Equally important to know what doesn't work:

- **Execute code:** that is what Claude Code is for (reserved for developers)
 - **Browse the internet freely:** it can search via Chrome, but it is not an unlimited automated browser
 - **Run with an active VPN:** this is the number one cause of failures — disconnect before use
 - **Run in the background:** Cowork needs the application in the foreground
 - **Process audio and video:** text and images only
-

2 Prerequisites and setup

2.1 What you need

Two requirements to use Cowork:

Claude subscription: Pro (around \$20/month) or Max (\$100-200/month). The free plan does not include Cowork.

Claude Desktop application: available on macOS and Windows (not Linux). Download from claude.ai/download.

2.2 Activating Cowork

Once Claude Desktop is installed:

1. Open Claude Desktop
2. Go to **Settings -> Features**
3. Enable **Cowork** (Research Preview)
4. Restart the application if prompted

Research Preview

Cowork is still in official testing phase. Features are stable for daily use, but minor bugs may appear. Report issues via the Help menu.

2.3 Creating your workspace

Fundamental rule: **never give access to your Documents, Desktop, or system folders.** Create a dedicated folder.

```
~/Cowork-Workspace/ |— input/ ← your source files to process
|— output/ ← what Cowork produces
```

Command to create the structure (in Terminal):

```
mkdir -p ~/Cowork-Workspace/input ~/Cowork-Workspace/output
```

Or create these folders manually in Finder (macOS) or File Explorer (Windows).

When Cowork asks for folder access, grant access **only** to `~/Cowork-Workspace/`. Nothing else.

3 The CTOC framework

CTOC is the prompt structure that makes the difference between “mediocre result” and “usable result”. Four blocks: **C**ontext, **T**ask, **O**utput, **C**onstraints.

3.1 Why vague prompts fail

Vague prompt: *“Help me with my invoices”*

Typical result: Cowork asks for clarification, you lose 10 minutes, the output is generic.

CTOC prompt: see example below. Result: Cowork does exactly what you want, first time.

3.2 The CTOC structure

CONTEXT: the situation, the files involved, the business background.

“I have 30 supplier invoice photos taken in March 2026, stored in ~/Cowork-Workspace/input/invoices-march/”

TASK: a single, precise objective.

“Extract for each invoice: supplier name, invoice date, pre-tax amount, VAT amount, total amount”

OUTPUT: the exact format and save location.

“Create an Excel file in ~/Cowork-Workspace/output/invoices-march.xlsx with one row per invoice and one column per data point”

CONSTRAINTS: the rules, currency, expected formats.

“Currency GBP, dates in DD/MM/YYYY format, sort by ascending date”

3.3 Complete examples by use case

3.3.1 Data extraction

```
CONTEXT: I have 30 supplier invoice photos in
~/Cowork-Workspace/input/invoices-march/ (March 2026).

TASK: Extract supplier, date, pre-tax amount and total for each invoice.

OUTPUT: ~/Cowork-Workspace/output/invoices-march.xlsx,
one row per invoice, columns: Supplier | Date | Pre-tax | Total.

CONSTRAINTS: Currency GBP, date format DD/MM/YYYY, sort by ascending date.

If a field is unreadable, put "TO CHECK" in the cell.
```

3.3.2 File organisation

```
CONTEXT: I have 150 mixed files (PDF, Word, Excel, images)
in ~/Cowork-Workspace/input/archives-2025/.

TASK: Sort these files by type and by quarter.

OUTPUT: Create the following structure in ~/Cowork-Workspace/output/:
2025-Q1/ 2025-Q2/ 2025-Q3/ 2025-Q4/, each with subfolders
PDF/ Word/ Excel/ Images/. Move the files accordingly.

CONSTRAINTS: Do not delete originals before my approval.

Create a recap.txt file listing the files moved.
```

3.3.3 Document generation

```
CONTEXT: I am a plumber. I have an appointment Monday with a client
to install a heat pump water heater. Client budget: £2,200.
My rates are in ~/Cowork-Workspace/input/rates-2026.pdf.

TASK: Create a professional quote for this installation.

OUTPUT: ~/Cowork-Workspace/output/quote-water-heater-smith.docx,
Word format, with my logo if available in input/.

CONSTRAINTS: Include VAT at the applicable rate, include 2-year warranty,
quote number QT-2026-042.
```

4 The 5 golden rules

These rules prevent 90% of the problems new users encounter.

Rule 1: Always validate the plan before execution

When you give a complex task, Cowork first proposes a detailed plan. Read the plan, check it matches what you want, then approve. This step takes 30 seconds and prevents starting over.

Rule 2: Dedicated folder only

Never grant access to `Documents/`, `Desktop/`, `Downloads/`, or system folders. Only `~/Cowork-Workspace/`. If you accidentally granted too broad access, revoke it in System Settings > Privacy & Security > Files and Folders.

Rule 3: Zero credentials in the workspace

Never put passwords, access codes, tokens, or `.env` files in the workspace. This information is sent to Anthropic's servers along with your prompts.

Rule 4: Check the source of external files

A PDF received by email can contain malicious instructions that hijack Cowork. Before giving an external file to process, verify its origin. This threat is called "prompt injection".

Rule 5: Active VPN = Cowork broken

Disconnect VPN before opening Cowork. This is the number one cause of startup errors (VM timeout). No workaround exists at this stage.

5 Understanding usage limits

5.1 The 5-hour cycle

Quotas do not reset at midnight but every **5 hours** from your first use. Understanding this mechanic prevents nasty surprises mid-day.

Anthropic does not publish a fixed limit in number of messages. Available capacity depends on exchange length, submitted files, model used, and overall service load. What users observe in practice: Pro users in heavy use reach their quota in 1 to 2 hours. Max subscriptions (5x and 20x) give respectively 5 and 20 times more capacity per 5-hour window.

Cowork consumes more than standard chat

Each Cowork task (reading files, writing outputs, acting on your system) consumes more quota than a simple conversation. Plan heavy processing at the start of a 5-hour window.

One “exchange” corresponds to your prompt + the response + the actions taken. A complex task across 50 files consumes significantly more than a simple question.

5.2 Choosing the right model

Cowork works with several models depending on task complexity:

Model	Recommended use	Consumption
Haiku	Simple questions, reformulations, repetitive tasks	Low
Sonnet 4.6	Writing, analysis, standard extraction	Moderate
Opus 4.6	Complex tasks, long syntheses, advanced reasoning	High

For most daily tasks (file organisation, document generation, simple extraction), Sonnet 4.6 is the right balance.

5.3 Managing a long session

If your session stretches beyond an hour or involves many files, a few precautions:

- Work in batches of 10 to 20 files rather than all at once
 - Keep the application in the foreground (no sleep mode)
 - Disconnect VPN for the full duration
 - If the session slows sharply: start a new session rather than continuing
-

6 Your first workflow

A concrete workflow to test Cowork in the next 30 minutes.

6.1 Workflow: rapid file organisation

What you need: a folder with at least 20 mixed files (PDF, images, Word, Excel).

Step 1: copy these files into `~/Cowork-Workspace/input/test-organisation/`

Step 2: open Cowork and paste this prompt:

```
CONTEXT: I have mixed files in ~/Cowork-Workspace/input/test-organisation/.
TASK: Analyse the files and suggest a filing structure appropriate to their content.
OUTPUT: First show me the proposed filing plan,
wait for my approval, then create the structure in
~/Cowork-Workspace/output/organised/ and move the files there.
CONSTRAINTS: Do not delete originals. Name folders in English.
Create a summary.txt file listing what was done.
```

Step 3: approve the plan that Cowork proposes before it acts.

Step 4: check the result in `output/organised/` and the `summary.txt` file.

In 15 minutes you will have seen Cowork propose a plan, ask for your approval, execute the task, and create a summary. This is the basic cycle of every Cowork workflow.

7 Recommended reading paths

Depending on your profile, here is how to progress through the series.

7.1 Beginner (first week)

1. This whitepaper (WP-00): fundamentals
2. Effective Prompts (WP-01): master CTOC in depth
3. Security and Confidentiality (WP-09): protect your data
4. The 28 workflows: pick the ones that match your activity

7.2 Executive (fast overview)

1. This whitepaper, section “What Cowork can do”
2. ROI and Deployment (WP-11): quantify value and manage adoption
3. Security (WP-09): understand what gets sent to Anthropic

7.3 Regular user (going further)

1. Effective Prompts (WP-01): 20 before/after examples
 2. Sector-specific whitepapers (WP-02 to WP-16) matching your activity
 3. Advanced workflows (automation, cross-session memory)
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8 The Series

This series covers the complete use of Claude Cowork for non-technical professionals.

#	Title	Status
WP-00	From Zero to Productive (this document)	Available
WP-01	Effective Prompts for Non-Developers	Available
WP-02	Administrative Automation	Available
WP-03	AI for Tradespeople and Construction	Available
WP-04	AI for Retailers and Shop Owners	Available
WP-05	AI for Consultants and Freelancers	Available
WP-06	Prospecting and Client Relations	Available
WP-07	Communication and Visibility	Available
WP-08	Organisation and Productivity	Available
WP-09	Security and Confidentiality for Small Businesses	Available
WP-10	Learning AI as a Non-Developer	Available
WP-11	ROI and Deployment for Executives	Available
WP-12	AI for Independent Healthcare Practitioners	Available
WP-13	AI for Short-Term Rental Managers	Available
WP-14	AI for Restaurant and Hospitality Owners	Available
WP-15	AI for Real Estate Agents and Brokers	Available
WP-16	AI for E-commerce and Online Sellers	Available

All whitepapers available at cowork.bruniaux.com/whitepapers/.