

DBR AI LEVERAGE LAB · FOUNDATION · COWORK SETUP · FULL-COLOR FIELD EDITION

Claude Cowork: Your AI That Does the Work

Connect your inbox, automate follow-up, and begin each morning with drafts ready for approval.

Built to turn clear ideas into useful, responsible action.

Connect your inbox, automate follow-up, and begin each morning with drafts ready for approval. This edition preserves and organizes the supplied training material into an easy-to-study magazine experience.

01 · FIND THE SIGNAL

Use the source guidance to identify the ideas, prompts, examples, and decisions that can improve your next workweek.

02 · APPLY WITH JUDGMENT

Review all client-facing language, validate relevant facts, and keep human responsibility in every important decision.

03 · TURN IT INTO A HABIT

Take one useful idea from this guide and make it part of a repeatable rhythm rather than a one-time experiment.

06 · MAGAZINE PAGES

Designed for online reading, printing, discussion, and action inside the DBR AI Leverage Lab library.

DBR AI Accelerator · Claude Cowork Setup Guide

DBR AI Accelerator · Claude Cowork Setup Guide

DBR AI Accelerator

CLAUDE COWORK Your AI That Actually Does the Work

Class Handout & Setup Guide · Connect email, automate your inbox, and wake up to prospecting drafts.

What Is Claude Cowork?

Claude Cowork is a desktop AI assistant from Anthropic that runs inside the Claude app on your computer. Unlike a normal chatbot that just types answers back to you, Cowork can work with your real files, connect to your email and calendar, take multi-step actions, and run tasks automatically on a schedule.

It is powered by Claude and requires a paid Claude plan PLAN REQUIRED (Pro, Max, Team, or Enterprise). Free accounts do not include Cowork yet.

WHY IT IS DIFFERENT: AGENTIC | Assistant, not search box

The word people use is agentic - meaning the AI acts like an assistant, not just a search box. A great agent does four things on its own:

The 4-Part Agentic Loop

Plans Uses Tools Breaks your goal into steps. Works with your email, calendar, files, and the web.

Acts Finishes Carries out the steps instead of just suggesting them. Delivers a result, then checks with you before anything sensitive.

CHATBOT VS. COWORK AT A GLANCE | The operating difference

A Regular Chatbot Claude Cowork

You ask, it types back Works on your real files

Lives in a chat window Connects to your email and calendar

Cannot touch your tools Takes multi-step actions for you

DBR AI Accelerator · Claude Cowork Setup Guide You do all the clicking Runs on a schedule while you sleep

SETUP - 3 STEPS, ABOUT 20 MINUTES | Do this live in class

Field Notes 02

Connect your email one time: in the Claude desktop app, open Settings, then Step 1 Connectors. Find Gmail and click Connect. Sign in and approve the access. Recommended: connect Google Calendar too.

Put it to work on your inbox today. Ask Cowork to scan unread email, draft replies, Step 2 summarize your calendar, and flag priority emails.

Schedule your morning prospecting routine. Type /schedule or ask Claude to run the Step 3 prompt on a cadence.

PLAIN-ENGLISH INBOX PROMPTS | Try these today

INBOX JOB STARTERS | Copy, paste, run

Scan my unread email and tell me the 5 that actually need UNREAD TRIAGE me today.

Draft replies to these three emails - friendly, short, and in my DRAFT REPLIES voice.

Summarize my calendar and flag the priority emails for DAILY BRIEF today.

SCHEDULE YOUR MORNING PROSPECTING ROUTINE |
The big one

Every weekday at 7:00 AM: review my calendar and inbox, list my 5 priority emails, then draft a PROMPT personalized follow-up for each prospect I have not contacted in 7+ days. Leave them as drafts for me to approve.

Walk in to drafts already written in your voice. Read, tweak, approve, send. Ten minutes instead of an hour - and consistent follow-up without the daily effort.

DBR AI Accelerator · Claude Cowork Setup Guide

Can You Schedule Actions At Certain Times?

Yes. Cowork scheduled tasks run your saved prompt automatically on whatever cadence you pick: every morning, weekdays at a set time, hourly, weekly - your choice. Set it with /schedule or ask: Run this every weekday at 7am. Change or cancel scheduled tasks from the Scheduled section anytime.

Field Notes 03

Scheduled tasks run only while your computer is awake AND the Claude desktop app is open. If the app is closed
IMPORTANT CATCH when a task is due, Cowork skips it and runs it the next time you open the app. Leave the app running in the morning so your routine fires on time.

SAFE BY DESIGN | Rules for email automation

Drafts, You Approve You Control Access By default, Cowork does not auto-send email. It You choose which tools to connect and can disconnect prepares the message and waits for your OK. them at any time.

Protect Client Data Verify Before Sending Never paste SSNs, account numbers, or health details Always check facts, names, product details, and tone into any AI tool. before sending.

THIS WEEK'S HOMEWORK | Who got their mornings back?

☐ Connect Gmail and Calendar in Settings -> Connectors.

☐ Run one inbox job today: Triage my unread email.

Schedule your morning prospecting routine using the ☐ prompt above.

☐ Approve and send one AI-drafted follow-up.

☐ Bring your results next week.

Stop checking. Start coworking.

The advantage appears when the lesson becomes a habit.

Choose one idea from this guide, put it into a real workflow this week, and review it in your own voice and judgment.

ONE DECISION · ONE ACTION · ONE BETTER WEEK