

DBR AI LEVERAGE LAB · COWORK LAB · INBOX & FOLLOW-UP · FULL-COLOR FIELD EDITION

Claude Cowork: From Inbox to Follow-Up

Connect your tools, automate routine work, and keep every important action under your approval.

Built to turn clear ideas into useful, responsible action.

Connect your tools, automate routine work, and keep every important action under your 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.

Claude Cowork — Setup Guide DBR AI Accelerator

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CLAUDE COWORK Your AI That Actually Does the Work DBR AI Accelerator — Class Handout & Setup Guide Connect your email, automate your inbox, and wake up to prospecting drafts every morning.

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Claude Cowork — Setup Guide DBR AI Accelerator

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 even run tasks automatically on a schedule. It's powered by Claude and requires a paid Claude plan (Pro, Max, Team, or Enterprise). Free accounts don't include Cowork yet.

Why It's Different: "Agentic" 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: • PLANS — breaks your goal into steps. • USES TOOLS — your email, calendar, files, and the web. • ACTS — actually carries out the steps. • FINISHES — delivers a result, then checks with you before anything sensitive. Claude's models are built specifically for this kind of multi-step, tool-using work — and Cowork puts that capability right on your desktop. The more agentic the assistant, the more it can take off your plate.

Chatbot vs. Cowork at a glance A Regular Chatbot Claude Cowork

You ask, it types back Works on your real files

Lives in a chat window Connects to your email & calendar

Can't touch your tools Takes multi-step actions for you

You do all the clicking Runs on a schedule while you sleep

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Setup — 3 Steps, About 20 Minutes
Step 1 — Connect Your Email (one time)
1. In the Claude desktop app, open Settings, then Connectors.
2. Find Gmail (you'll also see Google Calendar, Microsoft 365, Drive, and more). Click Connect.
3. Sign in and approve the access in the pop-up window.
4. Recommended: connect Google Calendar too, so Claude can build a real morning briefing.

[△disconnect](#) You only do this once. Claude remembers the connection from then on. You can any tool anytime in the same Connectors screen.

Step 2 — Put It to Work on Your Inbox (today)
Now just ask Cowork in plain English. Try these: "Scan my unread email and tell me the 5 that actually need me today." "Draft replies to these three emails — friendly, short, and in my voice." "Summarize my calendar and flag the priority emails for today."

Step 3 — Schedule Your Morning Prospecting Routine
This is the big one. Set it once and Cowork runs it automatically every morning. Type `/schedule` or just ask Claude to run it on a cadence, and paste a prompt like this: "Every weekday at 7:00 AM: review my calendar and inbox, list my 5 priority emails, then draft a personalized follow-up for each prospect I haven't 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.

Field Notes 03

Can You Schedule Actions at Certain Times? Yes. Cowork's 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 the “/schedule” command, or just ask: “Run this every weekday at 7am.” • Change or cancel any scheduled task from the Scheduled section anytime.

⚠️ Claude One important catch: scheduled tasks run only while your computer is awake AND the desktop app is open. If the app is closed when a task is due, Cowork skips it and runs it the next time you open the app. Tip: leave the app running in the morning so your routine fires on time.

Safe by Design • It drafts, you approve. By default Cowork does NOT auto-send email. It prepares the message and waits for your OK before anything goes out.

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- You control access. You choose which tools to connect, and you can disconnect them at any time. • Protect client data. Never paste SSNs, account numbers, or health details into any AI tool. Always verify facts before you send.

This Week's Homework ☐ 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 — who got their mornings back?

Stop checking. Start coworking.

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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