



FOR MARKETERS MOVING FROM CHATGPT

Claude Cowork crib sheet

Cut-and-paste templates and prompts for your first month with Cowork.



What is in this sheet?

- ▶ A 7-step setup checklist
- ▶ A CLAUDE.md template you can drop straight into your folder
- ▶ A starter Global Instructions block
- ▶ Five outcome-led prompts for everyday marketing tasks
- ▶ A migration prompt for your old ChatGPT export
- ▶ Common pitfalls and safety reminders

1. The 30-second mindset shift

ChatGPT lives inside one chat tab. You ask, copy, paste, reformat. Cowork is built around outcomes: it reads and writes real files in a folder you choose, plans the work, and delivers finished documents.

Brief it like a freelancer, not a search bar. Tell it what done looks like and let it decide the route.

2. Setup checklist

Tick these off in order. Most of it takes under 20 minutes.

01 Plan Pro, Max, Team or Enterprise. Cowork is paid only.

02 App Install Claude Desktop for macOS or Windows. Cowork does not run in the browser.

03 Folder Create a fresh working folder. Start low stakes, not your live client work.

04 Mode Use Ask before acting while you are still learning. Switch to Act without asking only with trusted folders.

05 Globals Settings, Cowork, Global Instructions. Paste the starter on page 4 and edit to taste.

06 CLAUDE.md Drop a CLAUDE.md file into your working folder. Template on page 3.

07 Connectors Add the connectors you actually use: Gmail, Google Drive, HubSpot, Notion.

PRACTITIONER NOTE

Cowork burns through usage limits faster than chat because it runs longer, multi-step jobs. If you find yourself bumping into limits on Pro, Max is the next sensible step before Team.

3. CLAUDE.md template

Save this as `CLAUDE.md` at the top of your working folder. Cowork reads it at the start of every session in that folder. Edit the bracketed parts before your first run.

CLAUDE.md

```
# Who I am
[Your name], [job title], [company / sector].
I work mostly on: [SEO, paid social, email, content, etc.].
My readers are: [B2B marketers, ecommerce ops, SaaS founders, etc.].

# Voice
- British English, sentence case, no em-dashes.
- Active and direct. Short sentences over long ones.
- Banned words: seamlessly, leverage, unlock, dive in, in today's
  fast-paced world, game-changer.
- Never use the words "delve" or "navigate" as a verb.

# Output rules
- Save all drafts to /OUTPUTS as Markdown unless I say otherwise.
- Always show me a 3-step plan before running any task that
  touches more than 5 files.
- Never delete files. Move them to /ARCHIVE instead.
- When summarising research, cite sources with title and URL.

# Working preferences
- I want substance over flattery. Skip preamble.
- If you are unsure, ask one short clarifying question.
- Flag risks plainly. I would rather see "this might break X"
  than a polished answer that hides the trade-off.
```

TIP

Keep it under one page of text. Anything longer and Cowork starts treating it as background noise. Update it as your preferences sharpen, not all in one go.

4. Global Instructions starter

These apply to every Cowork session, regardless of folder. Paste into Settings, Cowork, Global Instructions. Keep it short: it loads on every single task.

GLOBAL INSTRUCTIONS

You are working alongside a senior digital marketer based in the UK.

Defaults that always apply:

- British English. No em-dashes. Sentence case for headings.
- If a CLAUDE.md exists in the working folder, treat it as the source of truth and follow its rules.
- For any task that will touch more than 5 files, show a short plan and wait for approval before starting.
- Save final outputs into a /OUTPUTS subfolder. Never overwrite source files.
- Cite sources for any factual claim.
- If a request is ambiguous, ask exactly one clarifying question before starting. Do not bury me in five at once.
- Avoid generic AI phrasing. Write the way a tired but competent practitioner would.

When you are done with a task, end with a one-line summary of what changed and where I will find it.

5. The outcome-based prompt formula

Stop telling Cowork how to do the task. Describe what done looks like. The four parts that almost always belong in a brief:

- ▶ **Source.** Where the inputs live. Folder paths, filenames, or a connector name.
- ▶ **Output.** What you want delivered. Format, filename, location.
- ▶ **Constraints.** Length, tone, what to include or exclude.
- ▶ **Verification.** How Cowork should check itself before declaring done.

6. Five prompts you can paste today

PROMPT 01: Monthly campaign roll-up

PASTE THIS INTO COWORK

```
Look at every CSV inside /campaign-data and build one summary spreadsheet called Q3-summary.xlsx in /OUTPUTS.
```

```
The summary should have one row per campaign with these columns: campaign name, channel, spend, impressions, clicks, CTR, CPA, conversions, revenue, ROAS.
```

```
Add a totals row at the bottom and a separate sheet with the top five campaigns by ROAS, top five by CTR, and any campaign where spend was over budget.
```

```
Before saving, sanity check the totals against my notes in /campaign-data/budget-tracker.md. Flag any mismatches in a short note at the top of the spreadsheet.
```

PROMPT 02: Competitor recon from a folder of pages

PASTE THIS INTO COWORK

```
Read every PDF and document inside /competitor-pages. For each competitor, produce a one-page Markdown brief in /OUTPUTS/competitor-briefs/ named after the competitor.
```

```
Each brief should cover:
```

- Their core proposition in one sentence.
- The three audiences they seem to target.
- The angles and language they use that we are not using.
- Any gaps that look like opportunities for us.
- A short list of pages, claims, or stats worth a closer look.

```
Keep each brief to roughly 400 words. No marketing jargon.
```

PROMPT 03: Content audit and refresh list

PASTE THIS INTO COWORK

Audit every blog post in /content/published-posts.

Produce one Markdown report at /OUTPUTS/content-audit.md with:

- A table listing each post: title, URL, word count, last updated, and primary topic.
- A column scoring each post 1 to 5 on: clarity of headline, search intent match, internal linking, and freshness.
- A list of the 10 posts most worth refreshing now, with the single biggest improvement to make on each.
- A list of any posts I should retire or merge.

If a post has not been updated in over 18 months, flag it.
Keep recommendations specific and actionable.

PROMPT 04: Pre-meeting briefing pack

PASTE THIS INTO COWORK

Pull every email I have received in the last 14 days that mentions our top 10 customer accounts (list in /accounts/top-10.md).

For each account, produce a short briefing card I can read before tomorrow's pipeline meeting. Save them all into /OUTPUTS/account-briefings.md.

Each card should include:

- The latest signal or update from emails.
- Any open questions or commitments I owe them.
- A suggested next action with one sentence of reasoning.

Keep each card under 100 words. Flag anything that needs my attention in the next 48 hours at the top of the file.

PROMPT 05: Repurpose webinar notes into multi-format content

PASTE THIS INTO COWORK

Take the rough notes in `/OUTPUTS/webinar-notes.md` and turn them into:

1. A LinkedIn post of around 150 words, written in my voice (see `CLAUDE.md`). End with one open question for the audience.
2. A 400-word blog post draft saved to `/OUTPUTS/blog/`.
3. Three suggested email subject lines for a follow-up to attendees, each under 50 characters.
4. A list of three quotes from the notes that would work as image cards.

Do not invent statistics. If a number is missing, leave a `[verify]` tag in the draft.

7. Bringing your ChatGPT history across

Export your ChatGPT data from Settings, Data Controls, Export. You will get a ZIP file by email within a few hours. Drop it in your Cowork working folder, then paste this prompt.

PASTE THIS INTO COWORK

I have a ChatGPT export ZIP in this folder. Please:

1. Unzip it into a /chatgpt-archive subfolder.
2. Parse all the conversation JSON files.
3. Group conversations by topic or project area, using the titles and content to decide.
4. For each group, create a knowledge summary Markdown file in /chatgpt-archive/summaries/. Each summary should list the conversations in that group with title, date, and a one-line description of what was discussed.
5. Produce one top-level index file at /chatgpt-archive/INDEX.md listing every group with a count and a short description.

Do not delete the original JSON files. If anything looks corrupt or unreadable, log it in /chatgpt-archive/issues.md and continue.

GOOD TO KNOW

ChatGPT exports do not include your custom GPT system prompts: those come out as empty strings. Plan to rewrite them as Cowork Project instructions or skills, which is honestly an upgrade.

8. Five mistakes to skip

▶ Pointing it at your whole desktop on day one.

Start small. One folder, copies of real files. Expand once you trust how it operates.

▶ Writing instruction-heavy prompts.

If your prompt reads like a procedure, you are doing ChatGPT in Cowork. Describe the outcome instead.

▶ Ignoring CLAUDE.md and Global Instructions.

These are the highest-leverage thing in the entire product. Spend an hour on them once and reuse forever.

▶ Letting one folder hold everything.

Use Projects to keep clients, workstreams, and personal admin separate. Stops context bleeding across jobs.

▶ Treating it as a one-shot tool.

Steer mid-task. Ask it to verify outputs against your brief before it declares done.

ONE LAST THING

Treat Cowork like a junior colleague who can do an extraordinary amount of work in an hour, and who needs three things to be useful: a clear brief, a tidy desk, and someone willing to glance over the result before it ships. Get those three right and you stop noticing it is AI.