

INTERMEDIATE GUIDE

Working fluently with Claude Cework

Connectors, Skills, Projects & multi-app workflows.

From running tasks to real leverage

This guide assumes you've run a few Cowork tasks and want to get real leverage — chaining tools, encoding your workflows, and producing client-grade deliverables reliably.

Need help standardizing this across a team? Reach us at nexushub.club/books-and-guides.

BEFORE YOU START

You've read **Book 1** or otherwise know Cowork's basics: modes, folders, and reviewing output.

You have at least one real, recurring task you'd like to make more reliable.

You're comfortable pasting prompts and adjusting bracketed placeholders.

THE COWORK SERIES

Book 1 — Beginner Guide SETUP · PERMISSIONS

Book 2 — Intermediate Guide YOU ARE HERE

Book 3 — Advanced Guide PLUGINS · TEAM SYSTEMS

Twelve chapters, start to finish

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HOW TO USE THIS GUIDE

Read straight through to build the mental model, then keep Chapter 10 open as a reference — its twelve full prompts are the fastest way to put this guide to work.

How Cowork really works (the task loop)

When you hand Claude a task, it:

1. **Analyzes** your request and creates a plan.
2. **Breaks** complex work into sub-tasks.
3. **Runs** code and shell commands in an isolated environment on Anthropic's servers.
4. **Coordinates** multiple workstreams in parallel when useful.
5. **Delivers** finished outputs to your session for preview and download.

You keep visibility throughout and can steer, or let Claude run independently.

WHERE IT RUNS

Cloud sessions (beta) execute on Anthropic's servers and persist across devices; local file access, browser use, and computer use are reached through the open Desktop app.

VISUAL 1.1 – THE COWORK TASK LOOP

YOU: MONITOR & STEER AT ANY POINT

1. Analyze & plan



2. Decompose into sub-tasks



3. Execute (isolated env)

Local files/browser via the open Desktop app



4. Coordinate parallel sub-agents



5. Deliver outputs

One goal in, a finished deliverable out.

Task decomposition

The skill that separates good delegators from frustrated ones is scoping. Claude decomposes automatically, but you get better, more predictable results when you shape the decomposition.

PRINCIPLES

One outcome per task thread. Don't blend two goals in one prompt.

Name the phases for long work: research → analyze → draft → format → verify.

Specify checkpoints where Claude should pause for your input.

Provide inputs and the definition of done up front.

COPY-PASTE PROMPT

Break this into phases and show me the plan before executing:

Phase 1 – Gather: pull the last 3 quarters of data from the connected folder.

Phase 2 – Analyze: compute QoQ growth and flag anomalies. Pause and show me findings.

Phase 3 – Build: create the deck only after I approve the findings.

TIP

A "pause and show me findings" checkpoint before any deliverable is built is the cheapest quality-control lever you have.

VISUAL 2.1 – SCOPING A TASK INTO PHASES



Insert human checkpoints before anything expensive or irreversible.

Connectors & MCP apps

Connectors let Claude use external services. They're built on MCP (Model Context Protocol), Anthropic's open standard. In Cowork, connectors reach external services through Anthropic's cloud, not your local network — so a custom connector must point to a server reachable over the public internet.

3.1 COMMON CONNECTORS

Google Workspace — Gmail, Calendar, Drive (available to Claude/Desktop users; Team/Enterprise owners enable first).

Enterprise connectors named by Anthropic (Feb 24, 2026):

DocuSign Apollo Clay Outreach
Similarweb MSCI LegalZoom FactSet
WordPress Harvey

NOTE

The first-party Google connectors have historically been read + create oriented; some "modify existing item" operations (move, rename, trash) have been limited. Verify current capabilities on each connector's page in the Connectors Directory.

3.3 MANAGING CONNECTORS

Control which MCPs are connected and how often they ask via the "+" menu or Customize > Connectors. Review them periodically and remove ones you no longer use.

3.2 SETTING PERMISSIONS PER CONNECTOR

Each connector can be set to Always allow / Needs approval / Blocked, and how those interact with Manual/Auto/Skip modes is:

	Always allow	Needs approval	Blocked
Manual	Approved	Asks	Denied
Auto	Read-only approved; write/delete: Claude decides	Claude decides	Denied
Skip	Approved	Approved	Denied

WARNING

Before extending a connector's access, assess how much you trust it. Every connector expands what Claude can reach — and the attack surface.

VISUAL 3.1 – PERMISSION MODES × CONNECTOR SETTINGS

	ALWAYS ALLOW	NEEDS APPROVAL	BLOCKED
Manual	Approved	Asks	Denied
Auto	Read-only ✓	Decides	Denied
Skip	Approved	Approved	Denied

How your mode and each connector's setting combine.

Skills: teaching Cowork your way

A Skill is a folder containing a SKILL.md file that teaches Claude a repeatable task — your brand rules, your report format, your close process. Think "a saved prompt made permanent": Claude loads it automatically when your request matches its description.

4.1 ANATOMY

YAML frontmatter (required): name (≤ 64 chars) and description (≤ 200 chars). The description is critical — Claude uses it to decide when to trigger the skill.

Optional: dependencies (e.g., `python>=3.8`).

Body: instructions Claude reads if the skill is relevant.

Bundled files/scripts: referenced from SKILL.md, loaded only when needed (progressive disclosure — metadata → body → linked files).

EXAMPLE SKILL.MD

```
### Metadata
name: Weekly Status Report
description: Build our standard weekly status report from a notes folder. Use when the user asks for a weekly update, status report, or Monday brief.

### Overview
Produce a 2-page report: Summary, Wins, Risks, Next Steps.

### Steps
1. Read all notes in the connected folder.
2. Group updates by workstream.
3. Draft each section; keep bullets under 15 words.
4. Flag anything unclear rather than inventing detail.

### Format
Deliver a Word document named "Weekly-Status-YYYY-MM-DD.docx".
```

4.2 CREATING & INSTALLING

Build conversationally: say "create a new skill" and follow the interview.

Record a skill (Mac; Pro/Max/Team): record yourself doing a task; Claude proposes a skill you review before saving.

Upload: zip the skill folder (folder as the zip root), then Customize > Skills > "+".

Manage: toggle on/off in Customize > Skills. On Team/Enterprise, skills are grouped as Personal, Shared, and Organization.

TIP

Skills adapt to the surface. A research skill may produce a Word doc in Cowork but detailed breakdowns in Excel. If your skill references a specific Excel/PowerPoint template, Claude for Excel/PowerPoint can load that template into the open file.

4.3 SKILLS VS. INSTRUCTIONS VS. PLUGINS

Instructions = background rules that apply to everything.

Skill = one repeatable process, loaded when relevant, shareable.

Plugin = a bundle of skills (+ connectors, sub-agents) for a role or process.

VISUAL 4.1 — SKILL.MD PROGRESSIVE DISCLOSURE

**Metadata: name +
description**
always loaded

SKILL.md body
loaded when relevant

Bundled reference files & scripts
loaded only as needed

Claude loads only what the task requires — keeps context lean.

Projects & context management

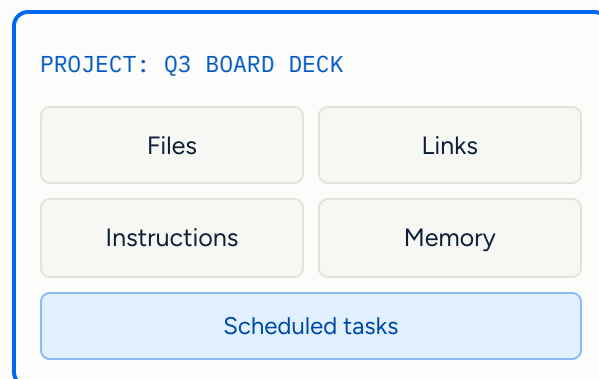
Projects group related tasks into a dedicated workspace with their own files, links, instructions, and memory. Cowork projects can be tied to a local folder (desktop only) or saved to your account for cloud sessions.

- Import an existing Claude chat project in one click, or start from a folder.
- Add instructions (tone, formatting, rules for all tasks in the project).
- Add project-scoped scheduled tasks.

NOTE

Cloud sessions also share memory with chat — Claude starts from what it remembers, and what surfaces in a task carries back to chat. Manage what it remembers via memory settings (verify current controls at support.claude.com).

VISUAL 5.1 – A PROJECT AS A WORKSPACE



Everything one piece of work needs, in one place.

Orchestrating Excel, PowerPoint, Chrome & Design

Most real work spans apps. Cowork can act as the orchestrator.

6.1 EXCEL & POWERPOINT

- Add-ins released as a research preview (Feb 5, 2026); paid plans, Mac and Windows.
- Since March 11, 2026, Excel and PowerPoint share full conversation context.
- Cowork can orchestrate end-to-end across both, passing context between them.
- PowerPoint reads your template (master, layouts, fonts, colors) and stays on-brand.

6.2 BROWSER (CHROME + BUILT-IN)

- Claude in Chrome works in your browser and pages you're signed into.
- A built-in Chromium browser (rolling out Aug 2026) opens in the desktop app.
- The Chrome side panel can run a full session (Aug 12, 2026).

WARNING

The built-in browser carries the same prompt-injection risk as any browsing agent. Start on trusted sites; be deliberate about which tabs are open when using the side panel.

6.3 CLAUDE DESIGN

Claude Design is a browser-based visual/design canvas from Anthropic Labs (launched April 17, 2026, research preview, powered by Claude Opus 4.7). It generates and iterates on prototypes, decks, microsites, and one-pagers, and complements Figma/Canva (it includes a Canva handoff). A separate product — the visual/design surface Cowork-style work can hand off to.

VISUAL 6.1 — THE THREE-LAYER WORKFLOW

Research (Browser)

↓ shared context

Analysis (Excel)

↓ shared context

Presentation (PowerPoint / Design)

Research feeds analysis; analysis feeds the deck —
Cowork orchestrates one session.

Multi-step workflows

Chaining is where Cowork earns its keep. A robust multi-step workflow states the end deliverable and audience, names each phase and the tool for it, inserts human checkpoints, and ends with a verification pass.

COPY-PASTE PROMPT

Goal: Produce a Q1 review deck for the leadership team.

Phase 1 (Browser): verify our three headline market stats against trusted sources. Cite them.

Phase 2 (Excel): analyze the Q1 workbook in this folder – revenue by segment, QoQ change, top 3 movers. Pause and show me a summary table.

Phase 3 (PowerPoint): after I approve, build a 10-slide deck using our template.

Phase 4 (Verify): re-check every number on the slides against the Excel source and list any discrepancies.

VISUAL 7.1 – A WORKFLOW WITH CHECKPOINTS

1. Browser verify



2. Excel analyze

CHECKPOINT — human review

3. PowerPoint build



4. Verify

Design the chain; keep a human in the loop where it matters.

Quality control & verification

Agent output is a strong first draft, not a final answer. Build verification into the workflow itself.

TECHNIQUES

Self-check step: "Before finishing, verify X against Y and list discrepancies."

Cross-source check: confirm figures against the original file, not its own summary.

Definition of done: state measurable criteria; ask Claude to evaluate against them.

Sample and audit: for large outputs, deep-check a random sample.

Second pass: ask Claude to critique its own output as a skeptical reviewer.

COPY-PASTE PROMPT

Review the deck you just built as a skeptical CFO. For each slide, confirm the numbers match the Excel source, flag any claim without a source, and list the three weakest points.

VISUAL 8.1 – THE VERIFICATION LOOP

1. Produce

2. Self-check vs.
source

4. Fix in place

3. Human review

↶ back to Produce

Two checks: Claude's, then yours. Nothing ships unverified.

WARNING

Never let self-verification replace your review for anything with real consequences — money, external sending, legal or client deliverables.

Output management & file organization

- Decide **where outputs go** before starting (name a target folder in the prompt).
- Use **consistent naming** (e.g., ClientName-Deliverable-YYYY-MM-DD).
- **Never overwrite originals** — ask for a new copy plus a change log.
- Keep a **/final** subfolder for approved deliverables so clients never see drafts.
- Use **Projects** to keep each engagement's files together.

COPY-PASTE PROMPT

Save all outputs to the connected /deliverables folder. Name files [Client]-[Type]-YYYY-MM-DD. Keep source files untouched; put approved versions in /final.

VISUAL 9.1 – A CLEAN DELIVERABLES STRUCTURE

```
Project/  
  sources/ – do not edit  
  working/  
  final/  
  briefings/  
  change-log.md
```

A predictable structure your whole team can rely on.

Twelve worked workflows (full prompts)

1. MARKET/COMPETITIVE RESEARCH BRIEF

Goal: A competitive brief on [3 competitors] for our product team.
Inputs: web (trusted sources) + positioning notes here.
Deliverable: 3-page Word doc – market overview, per-competitor summary, comparison table, 5 implications.
Cite claims; flag anything unverifiable.

2. REPORT FROM A STACK OF SOURCE FILES

Goal: A due-diligence style summary from the PDFs here.
Deliverable: Executive summary + findings by theme + open questions. Quote sources with file names. Do not infer beyond the documents.

3. DATA CLEANUP & ANALYSIS

Goal: Clean and analyze the CSV in this folder.
Steps: standardize formats, dedupe, flag outliers, then compute [metrics].
Deliverable: Cleaned Excel copy (new file) with a summary tab and a change log.

4. DECK FROM ANALYSIS (EXCEL → POWERPOINT)

Goal: Build a 12-slide deck from the open Excel analysis.
Deliverable: On-brand PowerPoint, our template, one idea per slide, closing recommendation slide. Re-verify every figure against Excel before finishing.

5. CLIENT DELIVERABLE PACKAGE

Goal: Assemble the client packet for [Client].
Inputs: the /working folder.
Deliverable: Polished report (Word), 1-page summary, cover email draft. Save approved versions to /final.
Draft the email only – don't send.

6. INBOX TRIAGE (GMAIL CONNECTOR)

Goal: Triage my inbox from the last 2 business days.
Deliverable: Grouped by theme with priority, a suggested reply per item, and a list of anything needing my decision.
Draft only; nothing sent without approval.

7. CRM UPDATE PREP (BROWSER / CONNECTOR)

Goal: Prep updates for my open opportunities.

Steps: read account notes here; for each, draft CRM field updates and next-step tasks. Present for approval before writing anything to the CRM.

8. MONTH-END CLOSE SUPPORT (FINANCE)

Goal: Support month-end close from the actuals folder.

Steps: build variance table vs. budget, flag variances over [threshold]%, draft a short close memo. Pause after the variance table for my review.

9. CONTENT PRODUCTION PIPELINE

Goal: Turn the outline here into a 1,200-word article for [audience].

Deliverable: Markdown draft in our house voice, plus 3 headline options and a meta description. Flag claims needing a citation.

10. ONBOARDING DOCUMENTATION

Goal: Draft an onboarding doc for a new [role] from the SOP notes here.

Deliverable: Step-by-step Word doc with a tools checklist and a first-week plan.

11. RECURRING WEEKLY REVIEW (SCHEDULED)

Goal: Every Friday 4pm, compile a weekly review from my project folder and calendar: what shipped, what slipped, next week's priorities. Save to /reviews. (Set with /schedule.)

12. LIVE DASHBOARD (DESKTOP; LIVE ARTIFACT)

Goal: Build a live dashboard of open tasks by project, pulling from connected tools, Slack mentions, and today's calendar. Save as a live artifact I can reopen.

VISUAL 10.1 – TWELVE WORKFLOWS BY AUDIENCE

1. Research brief

2. DD summary

3. Data cleanup

4. Deck build

5. Client package

6. Inbox triage

7. CRM prep

8. Month-end close

9. Content pipeline

10. Onboarding doc

11. Weekly review

12. Live dashboard

☐ Individual ☐ Small business ☐ Team/Ops

Efficiency & usage management

Cowork consumes more usage than chat, and Auto mode uses more than Manual because of per-action safety checks. Chat, Cowork, and Claude Code draw from the same usage pool. Limits work in two layers: a rolling 5-hour session limit and a weekly cap (verify current values at claude.com/pricing and in Settings > Usage).

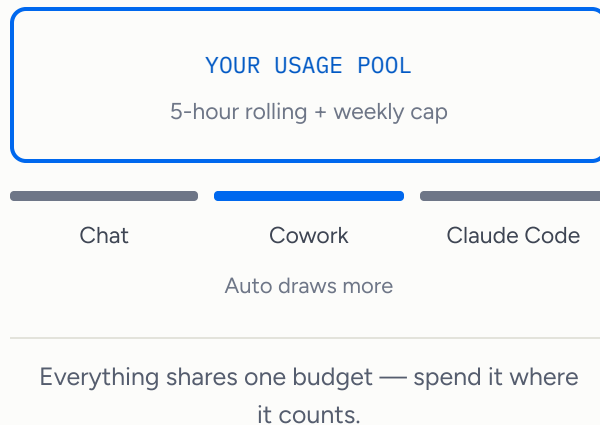
TO STRETCH YOUR USAGE

- Batch related work into single sessions.
- Use Chat for simple tasks that don't need files or long execution.
- Reserve Auto mode for when hands-off speed is worth the cost.
- Trim context: point Claude only at the folders/files it needs.
- Monitor Settings > Usage and calibrate.

NOTE

Anthropic periodically runs temporary usage-limit boosts and changes limits as compute capacity shifts. Don't hard-code assumptions — check the current state.

VISUAL 11.1 — ONE SHARED USAGE POOL



You can chain, encode, and verify. Now scale it.

You can now chain tools, encode Skills, manage Projects, and verify output. The **Advanced Guide** covers authoring production-grade Skills and plugins, multi-agent and parallel design, house SOP systems, org governance and security at scale, evaluation frameworks, and failure-recovery playbooks.

YOU'VE COVERED

- | | | | |
|----------------|--------------------|-----------------|-----------------|
| ✓ 01 Task loop | ✓ 02 Decomposition | ✓ 03 Connectors | ✓ 04 Skills |
| ✓ 05 Projects | ✓ 06 Orchestration | ✓ 07 Workflows | ✓ 08 QC |
| ✓ 09 File org | ✓ 10 12 workflows | ✓ 11 Usage | → 12 Next steps |

BOOK 1

Beginner Guide

Setup, permissions,
first tasks.

BOOK 2

Intermediate Guide

You are here — connectors,
Skills, workflows.

BOOK 3

Advanced Guide

Plugins, multi-agent design,
team-wide systems.

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