




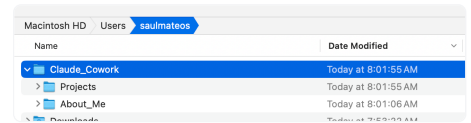
# Your 10-Step Guide to Set Up Claude Cowork


A simple roadmap to start smarter, faster, together. Built by Saul Mateos · CFO Lab.

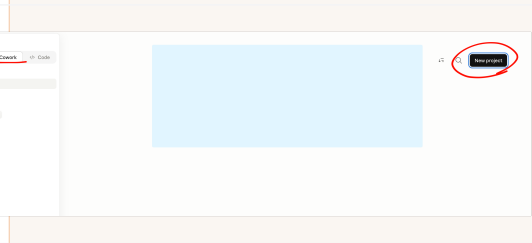
**01**  **Get the app.**  
Download Claude Desktop at [claude.com/download](https://claude.com/download).

**02**  **Go Pro. Or Max.**  
Three plans: Pro \$20/mo, Max 5x \$100/mo, Max 20x \$200/mo. Usage resets every 5 hours, with a weekly cap on top. Pro runs out fast for finance work. Max 5x is the sweet spot.

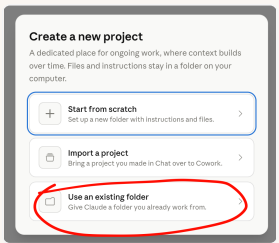
**03**  **Make a Claude\_Cowork folder.**  
On your computer. Create a Claude\_Cowork folder with two subfolders: About\_Me and Projects.



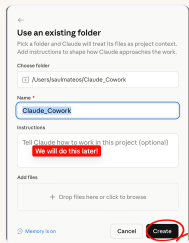
**04**  **Open Claude Desktop and create a Project.**




Click "+ New project"



Pick "Use an existing folder"



Confirm folder, then click "Create"

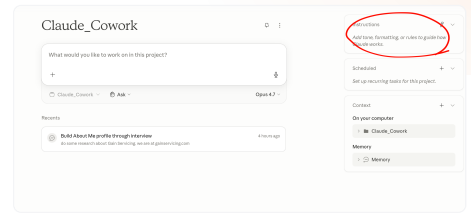
**05**  **Fill About\_Me with three .md files.**  
A .md file is plain text. Any editor opens it. Three files: about-me.md (your role), my-firm.md (clients, services, deals), my-voice.md (how you write). One file with three sections also works.  
*Don't want to write blind? Paste this in Claude: "Interview me to build my About\_Me files. One question at a time. Three topics: my role, my firm, how I write. 3-5 questions per topic. After each topic, draft the .md and let me edit before we move on."*

06



**Set Project instructions.**

One sentence: “Read every file in About\_Me before answering. Match my voice. Ask before assuming.”

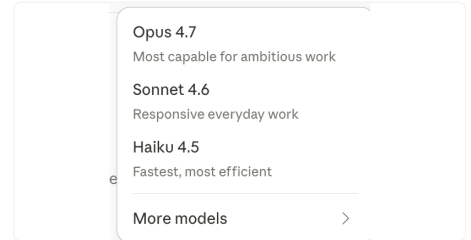


07



**Pick the right model.**

Opus 4.7: top-tier for memos, models, multi-step analysis. Sonnet 4.6: fast everyday work (drafts, edits, search). Haiku 4.5: quick lookups, light tasks. Use Opus thinking mode when math has to be exact. On Pro you'll burn the weekly cap fast. Max 5x gives real breathing room.



08



**Get a markdown editor.**

.md files open in any text editor (TextEdit on Mac, Notepad on Windows). For a real workflow: Typora (Mac + Windows, \$15 one-time) is the cleanest visual editor. Or Obsidian (free, all platforms) adds backlinks and a graph view. Open your Claude\_Cowork folder as the vault.

09



**Create a project for your work.**

For each workstream (a forecast, a memo, a client deck) make a subfolder inside Projects/. Do it yourself in Finder/File Explorer, or ask Claude: “Create a new subfolder under Projects/ called [name].” Keeps each piece of work tidy and separately resumable.

10



**Pick up where you left off.**

Don't start over each session. Reopen the chat from Claude Desktop's sidebar. Or before you wrap, ask Claude: “Save a summary of what we did and what's next to summary.md in this project folder.” Next session: “Read this folder and pick up where we left off.”

**LIVE WEBINAR**      Thursday June 18 · 12:00 PM ET · 45 min · Free      [bit.ly/cowork-finance](https://bit.ly/cowork-finance)