



THE STARTER GUIDE

Claude Cowork.

for real estate agents.

START
HERE

01

YOUR FIRST 30 MINUTES

The AI that stops giving you words and starts giving you finished files. Setup, safety, and the five workflows that earn the subscription in your first month.

INSIDE THIS ISSUE

- 01 What Cowork actually is
- 02 What you need before you start
- 03 Setup in seven steps
- 04 Five workflows that earn the subscription
- 05 Dispatch, your phone as a remote control
- 06 Best practices, the short list
- 07 When things go sideways



AGENT STARTER GUIDE / AI TOOLS

Claude Cowork

for Real Estate Agents

Your first 30 minutes with the AI that actually does the work.

Most AI tools give you words. Cowork gives you finished files. It is the version of Claude that works inside your folders, on your computer, on the documents you already have. You stop typing prompts at a chat window. You start handing off tasks the way you would to a competent assistant who never asks for vacation.

This guide is the on-ramp. It assumes you have never used Cowork before. It walks you through setup, your first task, the safety rules, and the five workflows that pay for the subscription in the first month. By the time you finish, you will know exactly what to do tomorrow morning.

Delegate the admin. Keep the relationship.

SECTION 01

What Cowork actually is

Regular Claude is a conversation. You ask a question, it answers. Useful, but you still have to copy the answer, open the right app, and paste it into the right file. Cowork closes that loop. You give it access to a folder on your computer, you tell it what you want, and it reads, writes, and creates files directly.

Think of it as the difference between calling a paralegal on the phone and handing them a folder. Same brain. Different reach.

USE COWORK FOR	DON'T USE COWORK FOR
Organizing a chaotic listing folder	Quick one-off questions (use regular chat)
Building a past-client spreadsheet from messy files	Live MLS lookups or real-time market data
Generating marketing copy from source documents	Anything requiring fiduciary judgment
Renaming hundreds of photos consistently	Signing or sending contracts on your behalf

USE COWORK FOR

Drafting follow-up emails from a client folder

DON'T USE COWORK FOR

Replacing your CRM or transaction management

SECTION 02

What you need before you start

Five things. Five minutes.

01. A paid Claude plan.

Cowork is included with Pro, Max, Team, and Enterprise. The free tier does not unlock it. Pro is the standard on-ramp for most agents and runs about the cost of a basic CRM seat.

02. The Claude desktop app.

Cowork lives in the desktop application, not the browser and not the phone alone. Download from claude.com/download. It runs on Mac and Windows.

03. A dedicated workspace folder.

Create one folder on your desktop named something like Claude Workspace. This is where Cowork will operate. Do not point it at your entire computer.

RISK NOTE. *Pointing Cowork at your whole drive is the single fastest way to create a problem you will spend an hour cleaning up.*

04. The Claude mobile app, optional but recommended.

If you install the mobile app and pair it with Dispatch (see Section 06), your phone becomes a remote control for Cowork. You can hand off tasks between showings and walk back to finished work.

05. A real task in mind.

Don't open Cowork to play. Open it with something specific you actually need done today. That is how you learn it.

SECTION 03

Setup in seven steps

Follow these in order. The whole thing takes under ten minutes.

01. Download the Claude desktop app.

Go to claude.com/download. Install it. Sign in with the account that has your paid plan attached.

02. Find the Cowork tab.

Look at the left sidebar of the desktop app. You will see a mode selector. The default is Chat. Switch to Cowork. The interface changes to a task-style view.

03. Create your workspace folder.

On your desktop or in Documents, create a folder called Claude Workspace. Inside it, create four subfolders: Listings, Past Clients, Marketing Drafts, and Inbox.

04. Grant folder access.

In Cowork, click to add a folder. Navigate to your Claude Workspace folder. When the permissions dialog appears, choose Always Allow for that folder only.

05. Verify what you just shared.

Open Cowork settings. Confirm only the Workspace folder shows in the granted list. If anything else is there from a previous install or curiosity, remove it now.

06. Run a throwaway first task.

Drop two or three files into the Inbox subfolder. Open a new Cowork task. Type: "Read the files in the Inbox folder and tell me what each one is." Hit send. Watch what happens. This is the equivalent of asking a new assistant to read the room before you give them real work.

07. Now you're ready.

Move on to Section 04 and run your first real workflow.

SECTION 04

Five workflows that earn the subscription

These are the workflows that move the needle for most agents in the first month. Run any one of them and the math on this tool stops being a question.

WORKFLOW 01

Listing folder cleanup.

Drop every file related to one listing into a folder. Disclosures, photos, inspections, contracts, MLS screenshots. Ask Cowork to sort by document type and rename with a consistent format. Five minutes of typing, a clean listing archive at the end.

WORKFLOW 02

Past client database build.

Collect closing statements, contact exports, and that old spreadsheet you keep meaning to update. One folder. One prompt. A clean spreadsheet with name, address, closing date, side, sale price, and email. The foundation for every sphere of influence campaign you have been promising yourself.

WORKFLOW 03

Listing marketing kit.

MLS sheet, disclosure, photo folder, and a paragraph of neighborhood notes. Ask Cowork to produce property descriptions in three lengths, a flyer draft, a video script, and a buyer persona. You edit and ship. The blank page disappears.

WORKFLOW 04

Buyer follow-up packet.

After a showing tour, drop your notes into a folder along with the MLS sheets for the homes you toured. Cowork drafts a follow-up email summarizing the day, highlighting what the buyer reacted to, and proposing next steps. You read, adjust, send.

WORKFLOW 05

Weekly recap and pipeline summary.

Drop your week's transaction folders, your calendar export, and your inbox screenshots into a folder. Ask for a one-page weekly recap with deals at risk, tasks waiting on you, and a Monday priority list. Sunday night brain dump, automated.

SECTION 05

Dispatch, your phone as a remote control

Dispatch is the feature that turns Cowork from a desktop tool into a field tool. You pair your phone with your desktop using a QR code. From that point on, you can text Cowork from your phone and the work happens on your computer at home or at the office. By the time you walk back to your desk, the task is done.

For an agent who lives in the car between showings, this is the unlock. The fifteen minutes between a 10:30 appointment and an 11:15 listing presentation becomes productive time you can actually use.

HOW TO SET UP DISPATCH

Three steps. Five minutes.

Install the Claude mobile app on your phone. In the desktop app, open Cowork settings and select Pair Mobile Device. Scan the QR code with your phone. That's it. Your phone is now wired to your desktop. Tasks you send from the phone execute on the computer at home.

Real-world Dispatch prompts that actually pay off for agents:

01. Before the morning meeting.

From your phone, on the drive in: "Check my calendar, pull the MLS sheets I saved for today's showings, and have a one-page brief ready on my desktop with addresses, prices, and three talking points per home."

02. Between showings.

Sitting in the car after a tour: "Read my voice memo notes from this morning, draft a follow-up email to the Smiths summarizing the three homes we saw, and leave it in my Drafts folder for me to review tonight."

03. End of day.

Walking out of a closing: "Update my Past Clients spreadsheet with the Johnson transaction. Closed today, buyer side, 425,000. Then add them to my 30-60-90 follow-up sequence folder."

04. The morning brief.

Schedule this as a recurring Dispatch task: "Every weekday at 6:30 a.m., check my calendar, my email for anything urgent, and my deal folders for upcoming deadlines. Leave a one-page brief on my desktop before I sit down with coffee."

SECTION 06

Best practices, the short list

Six rules. Learn them once. They will keep you out of every common Cowork problem.

01. Write prompts like you're talking to a smart new assistant.

Tell it what the folder contains, what you want, the format you want it in, and how to handle uncertainty. A good prompt has four parts: context, task, output spec, and an instruction for what to do if it gets stuck.

02. One folder, one task, at first.

Resist the urge to point Cowork at five folders and ask for a miracle. The agents who succeed with this tool win one small task, then build from there. The agents who fail try to automate their whole business on day one.

03. Verify before you forward.

Cowork is fast and confident. That is the feature and the failure mode. Open the spreadsheet. Read the email draft. Spot check the renamed files. Then send.

RISK NOTE. *Anything that goes to a client, a lender, or a closing attorney needs your eyes on it before it leaves your computer. Always.*

04. Keep sensitive files out of Cowork folders.

Loan documents, full Social Security numbers, banking details, and full credit reports do not belong in your Cowork workspace. Treat this folder like a shared whiteboard, not a vault.

05. Save your best prompts.

When a prompt produces a great result, copy it into a text file in your Workspace called Prompts That Worked. That file becomes your personal playbook. After two months, you have a competitive advantage no one can copy.

06. Compliance is still yours.

Fair Housing language, agency disclosures, fiduciary duty, and contractual obligations belong to you. The tool helps you move faster. It does not change the rules you operate under. If Cowork drafts something that crosses a line, you catch it. Not the AI.

SECTION 07

When things go sideways

Cowork is a research preview that is graduating into a mature product. Most problems are small. Most fixes are smaller.

01. It says it cannot find a file.

Check that the file is actually in the folder you granted access to, not a different folder with a similar name. Cowork only sees what you gave it permission to see.

02. The output is wrong or generic.

Your prompt was too vague. Add context. Tell Cowork what the project is, who the audience is, what voice to use, and what good looks like. Better source material beats better prompting every time.

03. It made changes you did not want.

Cowork uses more tokens than chat, which is one reason to keep prompts narrow. If it did something destructive, check your folder's trash or recycle bin first. Then revoke folder access in settings and re-grant with a smaller scope.

04. It is asking for too many approvals.

Good. That is the safety feature working. As you build trust with specific workflows, you can grant standing permissions for known folders and tasks.

05. The mobile app cannot reach the desktop.

Dispatch needs your computer to be on and signed into Claude. If your desktop is asleep, your phone has nothing to talk to. Adjust your computer's sleep settings if you want to use Dispatch during long stretches away from the desk.

ONE LAST THING

Three rules that will make you good at this.

Every agent who learns this tool well does the same three things. None of them are technical.

01. Start with one workflow.

Pick the one in Section 04 that solves your biggest weekly pain. Run it three times. Don't move on until it is automatic.

02. Build a prompt library.

Every great prompt is reusable. Save the ones that work. After a month, you have a personal AI playbook tailored to how you actually do business.

03. Use the time you get back.

If Cowork gives you back four hours a week and you spend them on email, you wasted the win. Spend the time you get back on the work only a human can do. Show up. Make calls. Sit with clients. That's the point of all of this.

REMEMBER

Keep the human first.

Cowork handles the file work so you can be in front of clients. Technology amplifies judgment, it does not automate empathy. The agents who win this next chapter are the ones who use the time it gives back to do more of what only a human can do.

Delegate the admin. Keep the relationship.

This starter guide describes general capabilities of Claude Cowork and Dispatch as of publication. Product behavior, pricing, and features change. Always verify output before relying on it for compliance, contractual, or fiduciary decisions. Not legal or financial advice. Claude and Cowork are products of Anthropic.