

THE CLAUDE COWORK SETUP — OBSIDIAN EDITION

# 7 Steps to Build the AI That **Actually** **Knows Your Business**

The Obsidian-first setup that turns Claude into your personal authority system. One morning. Seven steps. An AI that reads your email, manages your calendar, writes in your voice, and works for you while you sleep.

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## Michelle Anderson

Founder, Meraki AI · South of France

[joinkyma.com](https://joinkyma.com)



# Most AI setups fail. Not because of the **tool**. Because of the **setup**.

People install Claude, type a prompt, get a decent response, and wonder why it still sounds like a generic AI a month later. The problem isn't Claude. It's that they haven't given it anything to work with. Every session starts from zero. No context, no memory, no voice. Just a very capable blank slate waiting to be told who it's working for.

The difference between an AI assistant and an AI tool is **context**. One knows your business. The other just waits for instructions. This guide is about building the one that knows.

These 7 steps are the exact setup I use to run Meraki AI. The order matters — each step builds on the last. Don't skip ahead.

The centerpiece is **Step 3: Build Your Obsidian Brain**. Your vault becomes the permanent memory layer that makes everything else actually work. That's where your voice lives. Your business context. Your audience. The details that make the difference between content that sounds like you wrote it and content that sounds like a content factory spat it out.

By the end of one morning, you'll have a Claude that reads your email, manages your calendar, writes in your voice, and runs tasks on a schedule without you needing to be at your desk.

**This is not a prompt guide. This is infrastructure.** You're building something that compounds — and gets better the longer it knows you.

# 01

## Install the App

*Don't do this from a browser tab.*

Go to **claude.com/download**. Get the desktop app. Drag to Applications. Done.

You need a Pro or Max plan. It costs money. It's worth every euro. I run my entire business on this and it's the best monthly spend I make. If you're serious about what you're building, this is not optional.

Once you're in, open the **Cowork tab**. Select a dedicated folder on your computer. That folder is your shared workspace with Claude. Everything you want it to access lives inside. Everything you don't want it touching stays outside.

Simple boundary. **Critical boundary.**

### DO THIS

Download from [claude.com/download](https://claude.com/download) → get Pro or Max plan → open Cowork tab → select a dedicated workspace folder on your computer.



# 02

## Write Your Global Instructions

*This is the most important thing in the entire setup. Everything else builds on it.*

Go to **Settings** → **Cowork** → **Global Instructions**.

Ask Claude to help you write your CLAUDE.md file. Tell it who you are, what you do, your tone, your rules, your audience. And add this line — non-negotiable:

"Never delete, send, or publish anything without checking with me first."

Save it. Claude reads this at the start of every single session. Think of it as a briefing document your assistant actually reads before walking in the door. Not a one-time setup — a daily orientation.

Most people write something thin here. The more specific this is — your boundaries, your tone, your audience, your active projects — the less you have to explain every single time. It's the difference between working with someone who knows you and starting over with a new hire every morning.

### DO THIS

Settings → Cowork → Global Instructions → ask Claude to write your CLAUDE.md → review, personalise, paste and save. The safety rule is non-negotiable.



# 03

## Build Your Obsidian Brain

*This is where 90% of setups stop. Which is exactly why their AI still sounds like an AI.*

### WHAT IS OBSIDIAN?

Obsidian is a **free** note-taking and knowledge management app that stores everything as plain text files directly on your computer. No subscription. No cloud. Your notes are yours. Download it at **obsidian.md**. Your "vault" is simply a folder on your computer where all your files live. That vault is about to become Claude's permanent brain.

Once Obsidian is installed, create a **/Claude/** folder inside your vault. Inside it, build these four files:

- › **about-me.md** — your business, your audience, your tools, your current projects. Everything Claude needs to work on your behalf.
- › **writing-rules.md** — your tone, your voice, your banned phrases. Once Claude knows what you never say, it stops saying it.
- › **memory.md** — a running log Claude updates at the end of every session. It never starts from zero again.
- › **context-map.md** — a navigation guide to your vault so Claude goes straight to what it needs.

Then add one line to your Global Instructions: *"At the start of every conversation, read [your file paths]."*

Claude now walks into every session knowing your business, your voice, and where you left off. That's not a tool. That's an assistant.

### DO THIS

Download Obsidian free at [obsidian.md](https://obsidian.md) → create **/Claude/** folder → build all 4 files → update Global Instructions to read them at the start of every conversation.



# 04

## Connect Your Tools

*The setup is only as powerful as the information it can reach.*

Go to **Settings** → **Connectors**. Start with these:

- › **Gmail** — Claude creates drafts only, never sends. Completely safe.
- › **Google Calendar** — week-ahead briefings, scheduling, event summaries.
- › **Obsidian** — your vault is already the brain; the connection makes it live inside Claude.

The move most people miss: update your **context-map.md** with a clear map of your Obsidian vault structure. Think of it as a satnav for Claude. Instead of burning tokens hunting through folders, it navigates directly to what it needs. The faster Claude finds things, the faster you get your answer.

Optional but genuinely useful: the *Claude in Chrome extension*. Thirty seconds to install. Lets Claude read any page you're on and pull information directly into your session.

### DO THIS

Settings → Connectors → connect Gmail + Google Calendar + Obsidian → update context-map.md with your full vault structure.



# 05

## Install Built-In Skills

*Skills are what take Claude from assistant to specialist. Most people don't even know they exist.*

Go to **Settings** → **Customize** → **Skills**.

Skills are pre-built specialist capabilities that change what Claude can actually do in a session. Not just write better — produce real outputs, run processes, and operate like someone who was trained for a specific role.

Some worth turning on right away:

- › **Word / PDF / PowerPoint skills** — Claude builds actual files, not just text to copy elsewhere. Real documents in your folder.
- › **Skill Creator** — lets you build your own custom skills. Zero code. You define the role, the behaviour, the output format.
- › **Marketing skills** — content drafting, brand voice enforcement, campaign planning, email sequences.
- › **Sales skills** — account research, outreach drafts, call prep, pipeline reviews.
- › **Scheduled Briefings** — daily and weekly summaries, inbox triage, priority planning.

The combination that changes things: document skills + Skill Creator + a skill built around your specific workflow. When you say "write me a client proposal as a Word doc," you get a Word doc. When you say "draft this week's content," you get a branded content plan.

Then create two folders in your Cowork workspace: **/outputs/** for everything Claude creates, and **/projects/** for project-specific memory and instructions.

### DO THIS

Settings → Customize → Skills → explore what's available → turn on document + presentation skills + Skill Creator → create **/outputs/** and **/projects/** folders.



# 06

## Add Plugins

*Plugins are specialists who bring their own tools and methods.*

Go to **Settings** → **Customize** → **Plugins** → **Browse**.

Start with what your business actually needs. There are plugins for legal review, lead research, content repurposing, social media management, project tracking. Pick what fits — don't install everything at once.

The part most people miss: don't just install and forget. Customise each one. Tell it what you do, who your clients are, how you operate. Context is what makes it useful instead of generic. An uncustomised plugin is just a default setting.

You can build your own custom plugins with **zero code required**. Define a role, give it context about your business, assign the tools it needs. I have a content agent and a client support agent running inside Cowork — both built without writing a single line of code.

### DO THIS

Browse plugins → install what's relevant → customise each one with your business context. Consider building one custom plugin for your most repetitive task.



# 07

## Set Up Scheduled Tasks

*This is the step where it starts to feel like you actually have a team.*

Go to **Settings** → **Scheduled Tasks** → **New Task**.

Two to start with:

- › **9:30am weekdays** — reads your inbox and calendar, drops a priority briefing in /outputs/. You start every day knowing exactly what needs to happen.
- › **Tuesday 10am** — pulls your tasks, emails, and calendar and generates a full week-ahead plan. Decision fatigue, handled.

Claude does this on its own. Every day. Before you've had your coffee.

Enable **Dispatch** in the Claude mobile app and you can send tasks from your phone to your desktop. Your computer works while you're living your life. The only requirement: your computer has to be on.

That's the 7 steps.

### DO THIS

Settings → Scheduled Tasks → New Task → set up morning briefing (9:30am weekdays) + weekly review (Tuesdays). Enable Dispatch on your phone.



# The Foundation Is Set. Now Build the Brain.

Seven steps gives you the infrastructure. What takes your content presence to the next level — a platform with an expert marketing brain already installed, built to generate content, images, and video in your voice — that's Kyma.

## Kyma

Your AI Authority Presence - [joinkyma.com](https://joinkyma.com)

FROM

**\$49**/mo

Kyma is an AI content platform with an expert marketing brain installed — trained in conversion strategy and built around your voice. You log in, it generates. Branded social media content, AI images, and short-form video. Not prompts you run manually. Software that runs for you.

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**Michelle Anderson** is the founder of Meraki AI and creator of Kyma. Former art educator — 25+ years teaching visual composition across multiple continents. Now an AI systems architect based in the south of France. She built the tools she needed because nothing good enough existed. And then decided other women should have them too.

