

Claude Personal Assistant Setup Guide

A practical setup guide for using Claude Cowork as a daily assistant that drafts replies, prepares a daily wrap-up, automatically creates reminders, and keeps email send control with you.

What this helps build

- A daily wrap-up based on calendar events, email, messages, reminders, and Drive notes.
- Email replies drafted in the user's own voice, saved to Drafts only.
- A daily work-log draft for Google Drive.
- Automatic Apple Reminders for every concrete work or personal commitment.
- A feedback folder for improving the assistant over time.

The guardrails

Drafts only The assistant never sends email. It saves drafts for the user to review and send manually.	Never miss the task Reminders are created automatically. An uncertain duplicate is better than a missed commitment.	Local evidence Messages and Reminders are read from the Mac because the workflow runs locally.
--	---	--

Before setup

- Claude desktop app installed on the Mac.
- Google Drive, Google Calendar, and Gmail connectors enabled in Claude.
- Messages in iCloud enabled on the Mac and iPhone.
- Reminders syncing through iCloud.
- Full Disk Access granted to Claude.
- A local folder connected to Claude, such as ~/Documents/Claude.

What the setup prompt does

The companion prompt is not a single generic instruction. It gives Claude a complete build process and makes Claude collect the details it needs before scheduling anything.

1. Intake Confirms your accounts, calendars, reminder lists, work-log folder, schedule, and boundaries.	2. Local setup Builds the Mac-side text export and verifies access to Messages and Reminders.	3. Tone file Studies your sent mail and texts so drafts use your real writing habits.
4. Dry run Tests every source, saves a draft without sending, and creates a test reminder.	5. Scheduled task Creates the local recurring task only after the complete workflow succeeds.	6. Daily rules Reminders happen automatically, email stays draft-only, and the Drive log waits for approval.

Recommended setup flow

- 1 Open <https://startaicincy.com/free-claude-cowork-prompt> and select Copy the Claude Cowork prompt.
- 2 Start a new Claude Cowork task and paste the complete prompt.
- 3 Confirm the local Mac, Google connectors, Messages, Reminders, and connected folder.
- 4 Let Claude create the local text-export scripts inside the connected folder.
- 5 Run the text export test before scheduling anything.
- 6 Create the tone file from sent mail and texts, then approve or correct it.
- 7 Create or confirm the Google Drive folders for logs and feedback.
- 8 Run one end-to-end dry run and confirm a test reminder is created automatically.
- 9 Schedule the local Mac task only after the dry run works.

Use this after pasting the complete setup prompt

The Copy button on the download page places the full setup guide and scheduled-task prompt on your clipboard. Paste it into Claude Cowork, then send this instruction:

Set up the daily personal assistant in the setup guide I pasted. Read the entire guide first, then walk me through the Intake section one or two questions at a time. Discover what you can from my Mac and connected services before asking me. Do not create the scheduled task until the dry run succeeds. The final task must always create Apple Reminders for every concrete commitment, task, event, date, or follow-up it finds, even when a duplicate is possible. Never edit or delete an existing reminder. Email must remain draft-only, and the work log must wait for my approval.

The reminder rule

Claude should always create a new Apple Reminder when it finds a concrete task, commitment, event, date, or follow-up. It should check for an obvious duplicate when practical, but uncertainty is not a reason to skip the reminder. It must never edit or delete an existing reminder.

What still waits for you

- Email is saved to Drafts only. Claude never sends it.
- The Google Drive work log is posted only after you approve it.
- Existing reminders and Drive files are never edited or deleted.

Good first test

Ask Claude to draft a reply to an email from yourself. Confirm the message appears in Drafts and confirm that nothing was sent. This test matters because email drafting is useful only when the no-send guardrail is real.

Need help setting it up?

Start AI Cincy can walk through the setup in a live AI workflow session and adapt it for your Mac, iPhone, inbox, calendar, notes, and reminders.

Visit startaicincy.com/services to book a setup conversation.