FREE RESOURCE

The Inbox Triage Starter
Four piles. Five minutes.

One copy-and-paste prompt that sorts your inbox before you open a single email. Built for Gemini in Gmail and Copilot in Outlook.

Quick win | Try it tomorrow | Gemini + Copilot

Most inbox time goes to deciding, not doing: open, read, close, open again. This prompt does the first pass and hands back every email in one of four piles. Your energy goes to clients, the routine work goes to the right person, and the noise gets cleared in one go.

AI that stays inside the tools you already trust. Gemini works inside your Google account and Copilot inside your Microsoft 365 account, the same place your email already lives. No new app needs access to your inbox.

THE FOUR PILES

01 Needs me

Only you can do it: advice, decisions, signatures, complaints, and deadlines from your dealer, carriers, or compliance.

02 Hand it off

Your team or a standard reply can take it: scheduling, forms, address changes, document requests.

03 Waiting on

The ball is in someone else's court: underwriting, carriers, client documents, unanswered questions.

04 Just noise

Newsletters, promotions, and notifications. Grouped by sender so you can clear them in one pass.

HOW TO USE IT

Gemini for Gmail — Google account

1. Go to **gemini.google.com** and sign in with your email account.
2. Type **@Gmail**, paste the prompt from page 2, and press Enter.
3. To reuse it, save it as a **Gem**: Gems, New Gem, paste into Instructions, Save.

Copilot for Outlook — Microsoft 365 account

1. Open **Copilot Chat** or the Copilot button in Outlook.
2. Paste the prompt from page 2 and press Enter.
3. Hover over it and select the **bookmark** to save it, or **Schedule this prompt** (needs a Microsoft 365 Copilot licence).

Try it tomorrow: fill in your team list (or write "I work alone"), run it once, and adjust. Use your business email account and read every suggested reply before anything goes out.

The Inbox Triage Starter: copy everything in this box Paste into Gemini or Copilot

You are my inbox triage assistant. I am a financial advisor. Review the email in my inbox from the last 24 hours (72 hours on Mondays) and sort every message into one of four piles.

PILE 1: NEEDS ME

Only I can handle it: a client or prospect question, advice, a decision, a signature, a complaint, or anything from my dealer, a carrier, or compliance with a deadline.
For each: sender, subject, one line on what they need, and whether it is for today or this week.

PILE 2: HAND IT OFF

Someone else could handle it, or a standard reply would do: booking meetings, forms, address changes, document requests, routine admin.
For each: what it is and who should take it, using my team list below. If I work alone, suggest a short template reply or a simpler way to handle it.
My team: [Name: what they handle] [Name: what they handle] (or "I work alone")

PILE 3: WAITING ON

I am waiting on someone else: underwriting, a carrier, client documents, or a reply to a question I asked.
For each: who, what I am waiting for, how many days it has been, and whether it is time to follow up.

PILE 4: JUST NOISE

Newsletters, promotions, notifications, and anything that needs no action. Group them by sender with a count. I will decide what to delete or unsubscribe from.

FORMAT

- Start with one line: "Needs me: X | Hand it off: X | Waiting on: X | Just noise: X"
- Then the top 3 things I should do first.
- Then each pile, most urgent first, one or two lines per email.

RULES

- Never send, delete, archive, move, or forward anything. Sort and suggest only.
- If an email fits two piles, use the higher one. Needs me comes first.
- Flag anything that looks like phishing, or any unusual request for money, banking details, or personal information.
- If you cannot open an email or are unsure, say so. Do not guess.
- Draft a reply only when I ask, in my voice: [paste your Persona File, or 3 lines about how you write].

What you get back

Needs me: 3 | Hand it off: 4 | Waiting on: 2 | Just noise: 17

Do first: reply to a client asking about a beneficiary change; sign the carrier amendment due today; call back a new referral.

Hand it off: two meeting reschedules and an address change go to your assistant.

Waiting on: underwriting results, day 9. Time for a nudge.

Illustrative example only. Names and details left out on purpose.

Make it yours

VIPs: add "Always put [names or domains] in Needs me."

Your words: list terms that matter, like renewal, RRSP, or underwriting.

Your voice: paste your Persona File so drafted replies sound like you.

Make it daily: see The Morning Inbox Assistant guide.

Please note: This is a starting point, not a complete system, and it is not legal, privacy, or compliance advice. AI can miss or misread emails, so keep an eye on your inbox. Keep client information inside the business tools your firm approves, and follow your firm's email, archiving, and privacy rules. Features, plans, and menu names change often; check Google's and Microsoft's help pages if a step looks different.