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 customers, 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: quotes, decisions, signatures, complaints, and deadlines from suppliers, the bank, or the CRA.

02
Hand it off
Your team or a standard reply can take it: bookings, reschedules, forms, invoice copies, routine questions.

03
Waiting on
The ball is in someone else's court: supplier orders, quotes you sent, deposits, 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 business 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 run a small business. 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 customer or prospect question, a quote request, a decision, a signature, a complaint, or anything with a deadline from a supplier, the bank, the CRA, or a key partner.
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: bookings and reschedules, forms, invoice or receipt copies, routine questions, 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: a supplier order, a reply to a quote I sent, a customer's deposit or details, or an answer 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, a fake invoice, 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 Voice 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 customer who needs a quote by Friday; approve the supplier order due today; call back a new referral.

Hand it off: two booking changes and an invoice copy go to your assistant.

Waiting on: a customer's deposit, 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 quote, deposit, invoice, or booking.

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

Make it daily: save it as a Gem in Gemini, or schedule it in Copilot.

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