

Email Management & Inbox Zero — Workbook

This workbook turns the course into a working email system you actually run. Work through one section per module: reset your inbox and set a schedule, build the filters and labels that sort mail for you, drill the two-minute processing pass and a template library, then add AI triage and the weekly habits that keep it alive. Fill the worksheets directly, do each build step in your real Gmail or Outlook account, and by the end you will have a cleared inbox, a working filter set, a reply-template library, and a one-page operating manual.

The Inbox Zero Mindset and a Clean Start

Internalize the five actions, clear your backlog safely with email bankruptcy, and lock in a processing schedule.

Exercise: Five-Action Decision Drill

Open your real inbox and take the top ten messages in order. For each, write the message in one phrase and the single action you will take, then actually take it. Do not skip ahead or leave a message undecided.

- List your top ten messages as short phrases, one per line.

- Next to each, write one action only: Delete, Delegate, Respond, Defer, or Do.

- How many of the ten could be archived or deleted with no reply? What does that tell you about why your backlog grows?

- Which one did you want to leave undecided, and what would deferring it with a due date look like instead?

Worksheet: Email Bankruptcy Plan

Fill this in before you run the bankruptcy so it is deliberate and safe. Use a cutoff of today, archive rather than delete, and send the contact note so important old threads come back to you.

Cutoff date (everything older gets quarantined)

Quarantine label or folder name (e.g. Backlog 2026-06)

Gmail search or Outlook sort I will use to select the old block

Inbox count BEFORE

Inbox count AFTER

Three threads I will pull back into the inbox before archiving (owe a specific reply)

Contacts I will send the short reset note to

Date and time I ran the bankruptcy

Worksheet: My Inbox Zero Definition and Schedule

Write a definition you can hit daily and the fixed times you will process. None of the sessions should be first thing in the morning. Block these as recurring calendar events.

My definition of done (e.g. inbox zero at end of each session, inbox five between)

Processing session 1 — time

Processing session 2 — time

Optional session 3 — time

My hard stop rule (what happens to leftover mail when a session ends)

Where deferred items will live (Snooze, Flag with date, or task list)

Checklist: Clean Start Checklist

- Wrote my one-sentence definition of done and kept it visible
- Created the dated quarantine label or folder
- Selected everything older than the cutoff and archived it (not deleted)
- Pulled back the few threads I genuinely owe a reply
- Sent the short reset note to key contacts
- Added two or three recurring Email Processing blocks to my calendar
- Confirmed my inbox count dropped below 30

Filters, Labels, and Rules That Sort Mail for You

Design a lean action-based label set, then build the Gmail filters or Outlook rules that file mail automatically.

Worksheet: Label and Folder Design

Define your action-based buckets and keep the total under eight. For each, write what goes in it and your one deferral mechanism. Delete any old topic folders you have not opened in three months.

Bucket 1 — Action: what goes here

Bucket 2 — Waiting: what goes here

Bucket 3 — Read Later: what goes here

Bucket 4 — Receipts: what goes here

Bucket 5 — FYI: what goes here

My single deferral mechanism (Snooze, Flag+date, or task)

Old topic folders I will delete or merge

Exercise: Build Five Filters or Rules

Build each rule in your account, using Skip the Inbox plus Apply label in Gmail or Move to folder plus Category in Outlook, and apply it to existing mail too. Record the exact criteria you used so you can edit later.

- Newsletters: what criteria did you use (list:unsubscribe or sender list), and which label or folder?
 - Receipts: which subject words did you match, and did you mark as read?
 - Notifications: which noreply or app senders did you route to FYI?
 - VIPs: who did you star or keep in the inbox, and why those people?
 - Did you tick Also apply to matching conversations / Run rule now, and how much did the inbox count drop?
-

Worksheet: Filter and Rule Log

Keep a running record of every filter or rule so the system is documented and tunable in your weekly review. Add a row each time you create one.

Rule name

Platform (Gmail filter / Outlook rule)

Criteria (from, subject, list, category)

Actions (label, move, archive, mark read, star)

Date created

Notes or things to tune

Checklist: Automatic Sorting Checklist

- [] Created exactly five action-based labels or folders and no more
- [] Set up colour Categories in Outlook (Waiting, Receipts, Read Later) if applicable
- [] Built the Newsletters filter/rule with Skip the Inbox / Move to folder
- [] Built the Receipts filter/rule and marked as read
- [] Built one VIP rule so important senders stay visible
- [] Applied each rule to existing mail, not just future mail
- [] Created a saved search or Search Folder for Waiting

Processing Fast: Templates and the Two-Minute Rule

Drill the one-pass processing routine, build a reusable reply-template library, and cut the volume you receive.

Exercise: Timed Two-Minute-Rule Pass

Run one full processing pass from top to bottom with a strict two-minute cutoff: under two minutes you do it now, over two minutes you defer and archive. Time the whole pass and reflect.

- How long did the full pass take from first message to empty inbox?

- How many messages did you handle in under two minutes versus defer?

- Which message did you catch yourself wanting to re-read, and how did you force a single decision (OHIO)?

- Where could a filter have removed a message before you ever saw it?

Worksheet: Repeated-Reply Audit

List the replies you write again and again; these become your templates. For each, note the trigger that prompts it and the placeholders you will need so the saved version is reusable.

Repeated reply 1 — trigger / when it is needed

Repeated reply 1 — placeholders (e.g. [name], [date])

Repeated reply 2 — trigger

Repeated reply 2 — placeholders

Repeated reply 3 — trigger

Repeated reply 3 — placeholders

Repeated reply 4 — trigger and placeholders

Repeated reply 5 — trigger and placeholders

Exercise: Save and Use Five Templates

Turn your five audited replies into Gmail Templates or Outlook Quick Parts / My Templates, with bracketed placeholders, then use them for real this week. Keep each in the five-sentence spirit.

- Which tool did you use (Gmail Templates, Outlook Quick Parts, My Templates)?

- Name each template by its trigger, not its topic, and list the five names.

- Which template saved you the most time this week, roughly how many uses?

- Which reply did you write twice this week that should become template number six?

Checklist: Volume-Reduction Checklist

- Unsubscribed from at least ten lists I do not actually read
- Muted or ignored two noisy threads I am only cc'd on
- Turned off email push notifications on my phone
- Disabled the desktop new-mail toast and sound
- Moved at least one fast back-and-forth thread to a call or chat
- Saved five reply templates with placeholders
- Asked to be moved to Cc or off a list where I am not an action owner

AI Triage and Keeping the System Alive

Use Gemini or Copilot to summarize and draft, then set up the weekly review and one-page manual that keep the system running.

Exercise: AI Catch-Up Triage

On your next backlog after time away, use Gemini (Gmail) or Copilot (Outlook) to summarize long threads and surface direct asks, then triage from that list. Always read AI drafts before sending and fix invented details.

- Which tool did you use and on how many messages?

- Ask the AI to list threads with a direct question for you — how many were there versus total?

- Draft one reply with AI: what did you have to correct (tone, a number, a name, an invented detail)?

- Roughly how much time did AI summarizing save on this catch-up versus reading everything?

Worksheet: Weekly Review Tracker

Run your Friday weekly review and capture the numbers so you have a baseline. Repeat weekly; a rising inbox count or falling session count is your early warning of relapse.

Review date

End-of-day inbox count

Processing sessions I actually kept this week (of planned)

Rough time spent in email per day

Waiting items I chased or cleared

New filter/rule I added this week

Template I added or removed

Worksheet: My Email Operating Manual (One Page)

Write your whole system in one page so it survives busy weeks and can be handed to an assistant or team. Save it where you will see it and review it monthly.

Definition of done

Processing schedule and hard stop

The five action-based labels/folders and what goes in each

My single deferral mechanism and where deferred items live

Where templates and filters are stored, and the rule for adding new ones

When my weekly review happens and its steps

My stated response norm (e.g. reply within one business day; urgent = call/chat)

Checklist: Keep-It-Alive Checklist

- Used Gemini or Copilot to summarize at least three long threads
- Drafted one reply with AI, edited it, and sent it
- Scheduled a recurring 30-minute Weekly Email Review
- Ran the weekly review once and recorded inbox count and time-in-email
- Wrote my one-page Email Operating Manual and saved it visibly
- Stated my response norm to my team or in my signature
- Set a reminder to review the manual in one month

Your Action Plan

1. Run an email bankruptcy today: archive everything older than the cutoff to a dated quarantine label and send the short reset note to key contacts.
2. Write your one-sentence definition of done and add two or three recurring Email Processing blocks to your calendar, none first thing in the morning.
3. Create exactly five action-based labels or folders (Action, Waiting, Read Later, Receipts, FYI) and delete stale topic folders.
4. Build the Newsletters and Receipts filters or rules with Skip the Inbox / Move to folder, and apply them to existing mail.
5. Add one VIP rule so important senders stay visible while routine mail is sorted away.
6. Run a timed two-minute-rule processing pass to empty, touching each message once (OHIO).
7. Audit your repeated replies and save five as Gmail Templates or Outlook Quick Parts with bracketed placeholders.
8. Spend ten minutes unsubscribing from at least ten lists, mute two noisy threads, and turn off email push notifications.
9. On your next catch-up, use Gemini or Copilot to summarize long threads and draft one reply, editing before you send.
10. Schedule a recurring 30-minute Weekly Email Review and write your one-page Email Operating Manual, then review it monthly.

