How to Automate Your Inbox with AI (Step by Step)

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A fully illustrated 28-step guide to automating your inbox with AI: audit what arrives, build labels and rules, draft and test prompts, connect your mail client safely, then review and maintain the system.

Phase 1 — Audit and Triage Your Inbox

1. **Export a week of email metadata**
   Export a week of email metadata.
2. **Count messages by sender and type**
   Count messages by sender and type.
3. **Sort mail into four mutually exclusive types**
   Sort mail into four mutually exclusive types.
4. **Set one measurable goal**
   Set one measurable goal.
5. **Create no more than six top-level labels**
   Create no more than six top-level labels.
6. **Draft one rule per recurring sender**
   Draft one rule per recurring sender.
7. **Add a needs-reply flag rule**
   Add a needs-reply flag rule.

Phase 2 — Draft and Tune with AI

8. **Write a one-line summary prompt**
   Write a one-line summary prompt.
9. **Build a reply template with tone slots**
   Build a reply template with tone slots.
10. **Give the model samples of your own voice**
    Give the model samples of your own voice.
11. **State what it must never do**
    State what it must never do.
12. **Run twenty historical emails through the prompt**
    Run twenty historical emails through the prompt.
13. **Measure false positives on the urgent flag**
    Measure false positives on the urgent flag.
14. **Route every draft to an approval folder**
    Route every draft to an approval folder.

Phase 3 — Connect and Automate

15. Connect through the official mail API

Connect through the official mail API.

16. Route newsletters into a digest folder

Route newsletters into a digest folder.

17. Auto-label by topic rather than keyword

Auto-label by topic rather than keyword.

18. Schedule a single daily summary

Schedule a single daily summary.

19. Pick your three most repeated replies

Pick your three most repeated replies.

20. Set conditions tight enough to be safe

Set conditions tight enough to be safe.

21. Add a ten-minute send delay

Add a ten-minute send delay.

Phase 4 — Secure and Maintain the System

22. Exclude anything containing personal data

Exclude anything containing personal data.

23. Turn off training on your content

Turn off training on your content.

24. Limit how far back the AI can read

Limit how far back the AI can read.

25. Review ten logged actions each week

Review ten logged actions each week.

26. Feed your corrections back into the rules

Feed your corrections back into the rules.

27. Delete rules that no longer fire

Delete rules that no longer fire.

28. Re-audit against the goal you set

Re-audit against the goal you set.

Sources

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Written as a checklist from https://www.howcompass.com/how-to/How-to-Automate-Your-Inbox-with-AI. Corrections: https://www.howcompass.c