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The 40-Minute Inbox Setup

ChatGPT

Seven steps. About 40 minutes start to finish. You can stop after any one of them and still be better off than you were.

What you need: a ChatGPT account. Steps 1, 2, 4, 5 and 7 work on the free plan. Connecting your inbox and running things on a schedule need a paid plan, and I have flagged those where they come up.

Step 1. Brief it once, not every morning

Do this first. Everything after it inherits what you write here.

Where to click:

1. Click your name or profile picture, bottom left, then **Settings**
2. On web or desktop, select **Personalization**. On iPhone or Android, select **Customize ChatGPT**
3. Make sure **Enable customization** is toggled **ON**
4. Type into the **Custom Instructions** field

Write five lines:

1. Who you are
2. What you work on most
3. How you want answers
4. What it should always do
5. The one thing it must never invent

Every new chat then opens already briefed, on every device.

The fifth line matters more than the other four. Mine says it must never invent a price, a date, or a name. Yours should name whatever would embarrass you if it turned up in a client email.

You get 1,500 characters on Free and Go, and 5,000 on Plus, Pro, Business, Enterprise and Edu. Five lines will not come close to either.

Step 2. Teach it your voice from your own sent folder

This is the step people skip, and then wonder why the drafts read like a robot.

Stop describing how you write. Nobody can do that accurately. Open your sent folder, find three to five emails you were happy with, and paste them into a normal chat wrapped like this:

```
<example>
[paste a real email you sent]
</example>
<example>
[paste another one]
</example>
Those are examples of how I write. Match that voice. Now draft: [your
```

```
new email]
```

The tags matter. They tell ChatGPT these are patterns to copy rather than instructions to follow. Without them it will try to answer your old emails instead of learning from them.

Now save it so you never paste those examples again. Ask ChatGPT to extract the rules first:

```
From those examples, extract the rules of how I write: typical sentence
length, the words I reach for, my tone, the words I never use, how I
open, and how I close. Give me the rules, not a summary of the emails.
```

Then keep those rules somewhere permanent:

1. Click **New project** in the left sidebar and call it *Email voice*
2. Open it, click the **three dots (•••)** at the top right, choose **Project settings**
3. Paste the rules into **project instructions**

Draft your emails inside that project from now on and your voice is applied every time, without pasting anything.

If you are on Business, Enterprise, Healthcare or Edu you can go one better and make it a Skill, which fires automatically in any chat rather than only inside the project: in the sidebar select **Plugins**, open the **Skills** tab, then **Create** and **Create with chat**. Skills are not available on Free, Go, Plus or Pro, so the project above is the version that works for everybody.

Step 3. Connect it to your inbox

Paid plans. This is the one step that genuinely needs one.

Where to click:

1. Click your name or profile picture, bottom left, then **Settings**
2. Select **Apps**
3. Find **Gmail** and connect it, then approve access in the Google window that opens
4. Read what you are approving while you are in there

You can also reach the same directory from a chat: click the **+** button in the message box, or the **Plugins** button underneath it, and connect from there.

Availability depends on your plan, your region and your workspace, so check it connects before you build the next step on top of it.

Step 4. Clear the backlog

This is where you get the first real win, and it costs you about a minute. Paste this into a chat:

```
Triage my inbox. Split the emails into needs a reply from me,
information only, and already handled. For each one in the first group,
give me the deadline and the one sentence I need to answer.
```

Four hundred emails come back sorted, with a deadline on each one actually waiting on you. The second and third groups are the point. Most of what feels like a backlog turns out to be neither.

Step 5. Build the qualifier so new enquiries arrive pre-scored

This is the piece that keeps working after you close the laptop.

Where to click:

1. Click **New project** in the left sidebar
2. Give it a name, something like *Enquiry qualifier*
3. Open the project, click the **three dots (•••)** at the top right, and choose **Project settings**
4. Put your qualifying questions and your real criteria into **project instructions**

The five I use:

1. Budget range
2. Timeline
3. Decision maker
4. Scope
5. The disqualifiers, meaning the work you will not take at any price

Write the disqualifiers down honestly. That is the line that saves you the hours you were going to spend on something you were never going to win.

Two things worth knowing before you build on this. Project instructions **override** your global custom instructions from step 1 inside that project, so repeat anything from step 1 you still want applying. And a scheduled task created inside a project **cannot** read that project's uploaded files, so keep your criteria in the instructions rather than in an attached document.

New enquiries then arrive already scored against your criteria, with a note on which question is still unanswered. You reply to the ones worth replying to.

Qualifying is a rule you already apply, just inconsistently. Written down once, it gets applied the same way at nine at night as it does at nine in the morning.

Step 6. Have it check the inbox every morning

Paid plans, and worth it.

Where to click:

1. Go to **Scheduled** in the sidebar
2. Ask for what you want in plain English, for example: *every weekday at 7am, check for new sales enquiries and score them against my criteria*
3. Turn on notifications at **Settings** then **Notifications**, and pick **Push**, **Email**, or both

If you want it to react the moment mail lands rather than at a set time, that is an event-triggered task: connect Gmail under **Settings** then **Apps**, then open **Work** and describe the trigger and the action. Those need Plus, Pro, Business, Enterprise or Edu, and are not available on Free or Go.

To change one later, open **Scheduled**, or click the task title inside its own conversation.

Step 7. Never send the first draft

```
Give me three versions of this message: firm and professional, warmer,
and the shortest that does not sound rude. Same facts in all three.
```

Read them side by side and pick the one that fits. Three drafts show you what you actually meant. One never does, because with one draft you are editing rather than choosing.

Then strike the four tells before it goes out, because your clients already spot every one:

1. Em dashes everywhere
2. Everything arriving in threes
3. A bulleted list where a sentence belonged
4. An opening that restates the question you asked

Read it aloud last. If it does not sound like something you would say, it is not finished.

Bonus: paper into the inbox

Photograph a sign-in sheet, a pile of business cards, a whiteboard, or anything else handwritten that somebody would otherwise retype. Upload it with the **+** button in the message box and use this:

```
Extract this into a table with columns Name, Company, Email. Flag
anything you could not read clearly rather than guessing.
```

Check the names column before you use it. Handwriting is where it slips, and a flagged gap is far better than a confident wrong guess.

What to do now

Do step 1 today. It takes five minutes and every other step gets better because of it.

If you get stuck on any of them, post in the community and I will walk you through it.

Community: skool.com/stephenai-8919

SOURCES

Everything here is documented behaviour, not a workaround.

- Custom instructions: https://help.openai.com/en/articles/8096356-chatgpt-custom-instructions
- Projects in ChatGPT: https://help.openai.com/en/articles/10169521-projects-in-chatgpt
- Apps in ChatGPT: https://help.openai.com/en/articles/11487775-connectors-in-chatgpt
- Scheduled tasks: https://help.openai.com/en/articles/10291617-scheduled-tasks-in-chatgpt
- File uploads: https://help.openai.com/en/articles/8555545-file-uploads-faq