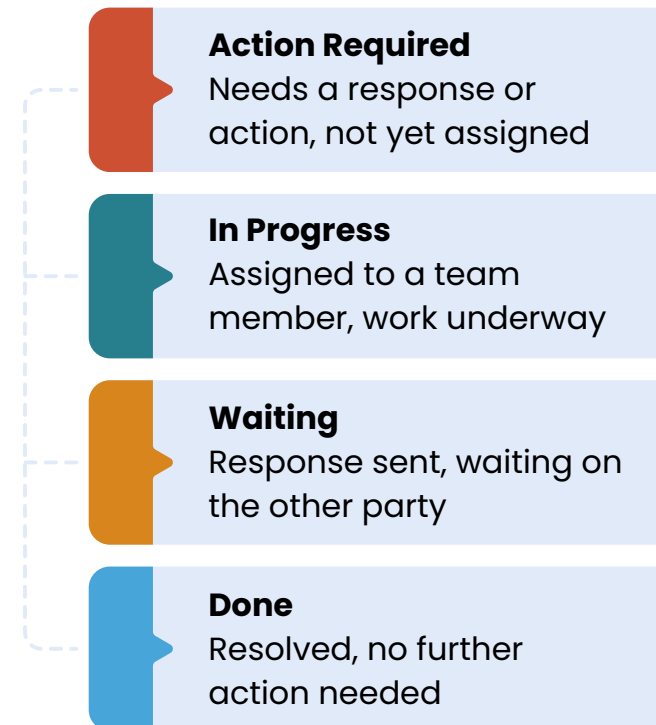


Tāhuna Consulting Shared Inbox Triage Guide

How we manage the general inbox consistently as a team

Every email in the inbox has one of four statuses at all times:



Daily Triage - 5 minutes, every morning

Work through new email in this order:

1. Can it be handled in under two minutes? Do it now, label Done.
2. Does it need a response or action from someone on the team? Label Action Required, add the owner's name in the thread, assign it.
3. Have you responded but are waiting to hear back? Label Waiting.
4. Is it informational only — no action needed? Label Done or archive it.

If you're unsure whether something needs action, label it Action Required.

Better to over-triage than let something sit unlabelled.

Ownership Rules

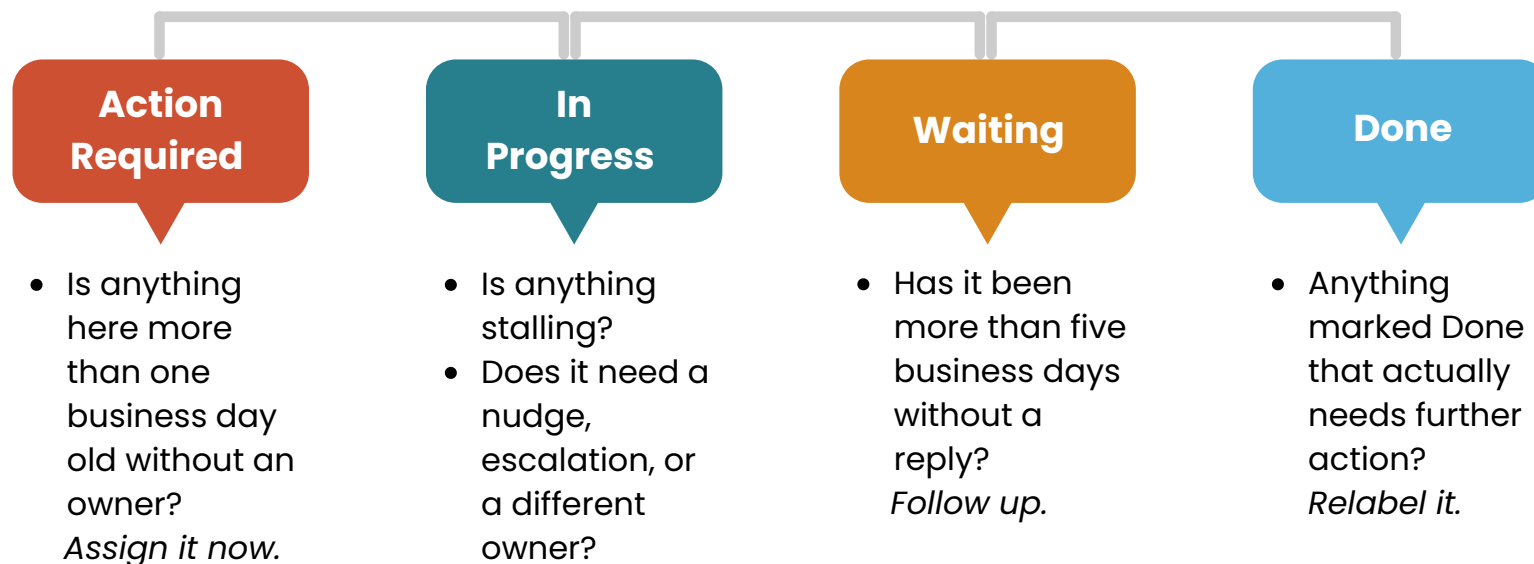
- No email should sit in Action Required for more than one business day without being assigned
- If you pick up an email, change the label to In Progress so the team knows it's being handled
- If you're going to be out, reassign your In Progress emails before you leave

Response Standards

- Acknowledge all enquiries within one business day, even if the full response takes longer
- If a response will take more than two days, send an interim reply letting the sender know
- Always reply from the shared inbox address, not your personal work email
- Use the email templates in [folder location] for common enquiry types

Weekly Review — 15 minutes, Friday afternoon

Go through each label and ask:



How to Add a New Filter in Gmail

- Open Gmail Settings (gear icon, top right) and click See all settings
- Go to the Filters and Blocked Addresses tab
- Click Create a new filter
- Enter the criteria – sender address, keyword, or subject line
- Click Create filter, then choose the action: apply a label, skip the inbox, archive, etc.
- Check Apply filter to matching conversations if you want it to catch existing emails too
- Click Create filter to save

Before adding a filter, check whether a similar one already exists – conflicting filters can behave unpredictably.

Gmail Filters - how email arrives pre-sorted

Sender/Keyword	Auto-Label Applied
Enquiries containing "quote" or "proposal"	Action Required
Newsletters and subscriptions	Archive automatically
Invoices and receipts	Finance folder
Existing client domains	In Progress

Filters are managed by [system owner]. Contact them to add or adjust.

**New Email
Arrives**

**Is it spam or a
newsletter?**

**Archive or
Unsubscribe**

**Does it need
action?**

**Label Action Required,
assign an owner**

**Are you
handling it?**

**Label in
Progress**

**Waiting on
a response?**

**Label
Waiting**

Is it resolved?

Label Done

A note on Done

Done means done – no further action required on our end.

If something marked Done comes back to life (they reply, circumstances change), remove the Done label and treat it as a new Action Required.