MODULE 03

Email Management Agent

Sort, draft, and respond to emails in your voice — without living in your inbox.

Time to set up	45–60 minutes setup
Difficulty	Beginner-friendly ★★■■■
What you'll have	A working Claude agent for: Email Management Agent

WHAT THIS AGENT DOES

This agent connects to your Gmail via MCP and handles your inbox like a sharp VA. It categorizes incoming emails, drafts replies in your voice, and helps you reach inbox zero without burning hours every day.

- Reads your inbox and summarizes what needs your attention
- Categorizes emails: client, lead, invoice, newsletter, junk
- Drafts replies in your exact tone and signs off as you
- Flags urgent items and tells you what can wait
- Saves all draft replies in Gmail for your review before sending

TOOLS YOU'LL CONNECT

Claude Desktop	Required for Gmail MCP access
Gmail MCP Server	Install via Claude Desktop → Settings → MCP Servers → Gmail
Google OAuth	Authorize Claude to read/write your Gmail (read + compose scope)
Zapier (optional)	Advanced routing: auto-label, forward, trigger Zaps from email

STEP-BY-STEP SETUP

01 Install Gmail MCP in Claude Desktop

Open Claude Desktop → Settings → Extensions. If Gmail is listed, click Add and follow the Google sign-in screen — select **Read and Compose** permissions only. Never grant Delete access. If Gmail is not listed in Extensions, refer to the Quick Setup Guide (Step 4) for the manual configuration method. **After installing: fully close and reopen Claude Desktop** — this restart is required for Gmail MCP to activate.

02 Test the Connection

In Claude Desktop, type: 'Show me my 10 most recent emails with sender, subject, and date.' If Claude returns real emails, you're live. **If you get an error:** (1) Make sure you fully closed and reopened Claude Desktop after installing Gmail MCP. (2) Go to Settings → Extensions and confirm Gmail shows as Active. (3) Click the Gmail entry and re-authorize if needed.

03 Create a Claude Project: 'Email Manager'

This is where your agent lives with persistent knowledge of your categories, tone, and communication style.

04 Paste the System Prompt

Add the system prompt below. Fill in your communication style and categorization preferences.

05 Add Tone Examples to Project Knowledge

Paste 3–5 real email replies you've written and are proud of. Claude uses these as tone references when drafting.

06 Run Your First Triage

In a new chat in the project, type the triage prompt below. Review Claude's categories and drafts. Send the ones that look right.

07 Build a Daily Habit

Run the triage prompt each morning. You can also schedule it via Claude's schedule feature for an automatic daily inbox summary.

SYSTEM PROMPT — COPY THIS

You are my email manager and communication assistant for [YOUR NAME]. MY COMMUNICATION STYLE: - Tone: [e.g., Direct and warm. Short paragraphs. No corporate speak.] - Sign-off: [e.g., "Talk soon, Sherwin"] - Response speed: [e.g., Clients within 4h, leads within 24h, everything else 48h] EMAIL CATEGORIES: - CLIENT: Active client communication, project updates, deliverables - LEAD: Potential new client inquiring about services - INVOICE: Bills, receipts, payment confirmations - ADMIN: Subscriptions, account notices, platform updates - NEWSLETTER: Content I subscribed to (low priority) - JUNK: Promotional, spam, unsolicited pitches - URGENT: Time-sensitive, requires same-day action WHEN I ASK YOU TO TRIAGE MY INBOX: 1. List emails by category (URGENT first) 2. For CLIENT and LEAD emails: draft a reply in my voice 3. For INVOICE emails: confirm the amount, flag anything unexpected 4. Skip NEWSLETTER and JUNK — don't draft replies for those 5. End with a summary: "X emails need your action today." IMPORTANT: Always save replies as Gmail drafts — never send without my review.

DAILY TRIAGE PROMPT

Pull my last 24 hours of emails. Categorize them using my system. For CLIENT and LEAD emails: draft replies in my voice and save as Gmail drafts. Give me a morning summary: what needs my attention, what you drafted, what can wait. Flag anything URGENT at the top.

PRO TIPS

- Never give Claude full delete access to Gmail — read + compose is enough.
- More tone examples in Project Knowledge = drafts that sound more like you.
- Create a 'Reviewed by Claude' Gmail label to track agent-drafted emails.
- Add your FAQ answers to Project Knowledge (pricing, availability) so Claude handles those automatically.
- Always review before sending — this is a draft assistant, not autopilot.