

Email Inbox Processing Standard

Daily triage, transaction correspondence and routing, for agents.

An inbox is not a to-do list, and treating it as one is why it never ends. This is a standard: five passes a day, each with a single job, a label scheme that does the sorting for you, six emails written once, and a decision made in advance about who handles what. The point is not to answer faster. It is to stop treating a newsletter and a closing date as the same interruption.

What “clear” actually means.

Every message is answered, labelled, delegated, or flagged with a date. An empty inbox is the by-product, not the goal. If a message has no next action and no owner, it should not still be sitting in the inbox at 5pm.

The five passes

☐ 01 First thing — morning scan, 5 minutes

Skim subject lines only and flag anything carrying a deadline or a dollar amount. Do not reply yet. This pass builds the priority list; it does not clear the inbox.

☐ 02 Within the hour — transaction critical first

Title, escrow, lender and inspector before anything else. These carry dates that move a closing, and a slow reply here is the one that costs money.

☐ **03 All day — the two-minute rule**

If the reply takes under two minutes, send it now. If it takes longer, flag it and let it wait for the midday batch rather than half finishing it.

☐ **04 Midday — the batch, a two to four hour window**

New leads and general client questions processed together. Same headspace, same templates open, far fewer context switches than answering each as it lands.

☐ **05 End of day — clear and confirm**

Batch the marketing, review every flagged item, and confirm nothing transaction-critical is still open. Anything you cannot close gets a holding reply with a date in it.

Response time targets

MESSAGE TYPE	TARGET
Title, escrow, lender, inspector	Within 1 hour
New lead enquiry	5 to 15 minutes, even if only to acknowledge
Client question, not urgent	Same business day
Vendor and scheduling	24 hours
Marketing and solicitation	No reply. Unsubscribe or filter.

Five labels, six filters

Filters do the sorting so the morning scan only ever sees what needs a person. Set them once and the inbox stays a work queue instead of an archive.

- Active: [client/address]
- Leads: new

- Marketing and newsletters
- Vendors and service providers
- Archived: closed

WHEN THIS IS TRUE	DO THIS
From a title company or escrow domain	Apply Active: [client/address], star it
Subject contains “inquiry”, “showing” or “Zillow”	Apply Leads: new, never send to spam
Contains the word “unsubscribe”	Apply Marketing and newsletters, skip the inbox
From an inspector, photographer or stager	Apply Vendors and service providers
From a lender, loan officer or processor	Apply Active: [client/address], mark as important
Subject or body contains “wire”, “wiring” or “funds”	Star it, then verify by phone before acting

In Gmail: Settings, See all settings, Labels to create them, then Filters and Blocked Addresses to build the rules. Tick “also apply to matching conversations” so existing mail sorts itself on day one, and colour-code every label — colour is what makes the morning scan take five minutes instead of fifteen. In Outlook the logic maps directly: labels become folders, filters become Rules, starring becomes Flag for follow up. Keep the names identical across the team so handoffs need no translating.

Nest each deal under one parent.

Active/123 Main St, with the address written exactly as it appears in your subject lines, so one search pulls the label and the thread together. When a file closes, move the label under Archived/ rather than deleting it. Worth knowing: label:active has:attachment older_than:7d finds every document you were sent last week and have not filed.

Six emails, written once

Six messages cover most of a transaction. Writing them once removes the two things that cause most client friction: delay, and forgetting a detail under pressure.

- ☐ **01 Showing confirmed: [address], [date/time]**
Time, address, access instructions and who will attend. Must include the lockbox or access method, parking, and what to do if plans change.
- ☐ **02 Offer received on [address]: next steps**
Terms, response deadline and the decision the client owes. Must include price, financing type, contingencies, and the exact hour the offer expires.
- ☐ **03 Weekly listing update: [address]**
Traffic, feedback, price position and the recommendation for the week. Must include one clear recommendation, even when the recommendation is to hold.
- ☐ **04 Documents needed to move forward: [address]**
Each required document, its due date and where to send it. Must be a numbered list, one line each — never bury a request inside a paragraph.
- ☐ **05 Under contract: what happens next**
Milestone dates from acceptance to closing, and who the client will hear from. Must include inspection, appraisal, financing and final walkthrough dates in one table.
- ☐ **06 Deadline reminder: [item] due [date]**
The outstanding item, the deadline and what happens if it slips. Must include the consequence — “due Friday” moves fewer people than “your earnest money is at risk Friday”.

- Keep the square brackets. An unfilled [address] is visible; a wrong address hard-coded last October is not.
- Put the deadline in the first two lines. Assume the client is reading on a phone, half way down a hallway.
- One ask per email. Two requests in one message reliably produces one response.
- Use the subject convention [Address]: [topic], so the template and the transaction thread stay searchable together.
- Review them twice a year. Templates go stale quietly when forms, timelines or state disclosures change.

Transaction email is a record

Handle every transaction email as though a broker, a lender or an attorney will read the thread twelve months from now, because one of them might.

- Verify the sender by the full address, not the display name. Display names are trivial to spoof and are what most fraud relies on.
- Copy the transaction coordinator on every deal-critical item so the file stays complete without anyone rebuilding it later.
- Save signed documents to the transaction file the same day they arrive. Same day, not same week — attachments get buried in threads.
- Confirm receipt in writing: one line naming the document and the date. It closes the loop and timestamps it.
- Keep one subject line per transaction. New subject lines fragment the history and make the thread unsearchable.
- Put verbal agreements in email the same day. Nothing is agreed until both sides have it in writing.
- Name files one way and never improvise: 123-Main-St_Addendum-2_2026-03-14.pdf. Address, document, date. Year-first dates sort correctly on every system.
- After any call that changes terms, dates or money, send a recap opening “Confirming our call today” and ask the other side to correct anything wrong. Silence then works in your favour.

Wire fraud

Always verify wiring instructions by phone, on a number you already had.

Never confirm by replying to the email, and never use a number printed in the email itself. This is the single most expensive mistake available in this business and it is almost always preventable at this one step.

Signals to stop on:

- A last-minute change to wiring instructions or account numbers.
- A sender domain that is off by one character from the real one.
- Urgency and secrecy together — pressure to wire today, and not to call.
- A reply-to address that does not match the sender's address.

- A link or attachment asking you to sign in again to view a document.
- A request to move the conversation off the usual thread, or to drop people from the copy list.

Making the verification call:

- Dial the number on the signed contract or a previously verified thread — never the one in the new email.
- Read the last four digits of the account back to the escrow officer and let them confirm. Do not ask them to read the number to you: a fraudster who has answered the call will simply agree.
- Log the date, the time and the name of the person who confirmed, and note it in the transaction file.
- Tell buyers at contract signing that wiring instructions will never change by email. Say it once, early, and put it in writing.

If anything looks off: stop, do not reply, and call escrow on the number from your signed contract.

Then forward the email to your broker. If funds have already moved, call the sending bank immediately to request a recall, notify escrow and your broker within the hour, and file a report at ic3.gov. The first 24 hours are when recovery is realistically possible.

Who handles what

Ownership decided in advance is what makes delegation fast. Nobody should be working out who handles an angry client while the client is waiting.

MESSAGE TYPE	OWNER
Showing requests and calendar scheduling	Assistant
New lead enquiries and first response	Assistant
Marketing, newsletters and vendor solicitations	Assistant
Document collection and signature reminders	Assistant
Title, escrow and lender status updates	Assistant

MESSAGE TYPE	OWNER
Offers, counteroffers and price conversations	You
Inspection findings and repair negotiations	You
Appraisal gaps and financing problems	You
Client frustration or a threat to terminate	Broker
Compliance questions, disputes and legal threats	Broker

- Hand over the full thread, forwarded rather than summarised.
- Give the deadline as a date and a time.
- State any decision you have already made, so it is not reopened.
- Say who to copy, and who deliberately should not be copied.

When in doubt, route up, not down.

Anything touching money, deadlines or contract terms is yours before it goes out. Anything touching law, licence or liability is the broker's.



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