

Email routing worksheet

Choose categories, owners, evidence and approval for incoming requests.

A routing table for repeat requests

An exception and approval record

A completed journalist-request example

A free worksheet from ailevrg.com/guides/email-triage

Inspect a sample of approved messages. Keep private client content and credentials out of a shared worksheet.

01 Requests

Inbox purpose and authorised users

Sample period and message types

Fields required from each request

Categories and next actions

02 Evidence and ownership

Sources needed to assess a match

Owner for each category

Missing deadline or uncertain fit rule

Private information boundary

03 Draft and approval

What the system may prepare

Reviewer and approval evidence

What authorises sending

Duplicate or failed-action rule

04 Test

Relevant and irrelevant examples

Missing evidence and unavailable source

Starting complete-job effort

Accepted output and correction measures

An invented journalist request

Invented teaching example. No client outcome is claimed.

Input

A journalist requests an expert comment on a topic by an explicit deadline.

Evidence

A current approved client expertise record supports a possible match.

Preparation

The workflow presents the request, deadline, evidence and proposed response together.

Decision

The reviewer confirms the fit and wording before sending.

If the supporting claim is missing, ask the account owner rather than complete the draft with a guess.

An illustrative journalist-request route

1. Software

Read and extract

Record requirements, topic and deadline, with the original message.

2. Software and approved sources

Check possible client matches

Retrieve current evidence within the client access boundary.

3. AI-assisted workflow

Prepare a recommendation

Show the proposed match, source and draft; hold missing information.

4. Person

Review and respond

Check the evidence and approve the outgoing message.

This diagram illustrates the pattern. The delivered launch workflow required human approval of all outgoing messages.