



CRM & FOLLOW-UP

The Claude + Gmail inbox playbook

Turn a messy inbox into a short list of what matters, draft replies faster, and stop spending evenings buried in email.

9

PAGES

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10 min

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How to turn a messy inbox into a short list of what matters, draft replies faster, and stop spending your evenings buried in email.

The goal: Search → Prioritize → Draft → Review → Send.

Built for dentist-owners who need to stay on top of vendors, hiring, marketing, team communication, and business admin without turning email into a second shift.

Use this for practice operations — not for patient PHI unless your compliance setup explicitly allows it.

Connect Gmail to Claude

Set it up once. Then ask for outcomes.

Claude's Google Workspace connector can search and read Gmail, use the context of email threads, organize messages, and create drafts in your Gmail account.

- 01 **Open Claude.** Start a new chat and open the Connectors area.
- 02 **Connect Gmail.** Authenticate the Google account you use for practice business email.
- 03 **Turn Gmail on for the chat.** When you ask an inbox question, Claude can use the connected mailbox as context.
- 04 **Start with a triage prompt.** Ask: "Find the emails from this week that still need my attention and tell me what each person needs."

Current Gmail limitation. Claude can create drafts in Gmail, but Anthropic's Google Workspace help center says the final Send still happens manually in Gmail.

BEST EMAILS TO USE THIS ON

- Marketing agency updates and approvals
- Equipment and supply vendors
- Job applicants and recruiting conversations
- Accountants, attorneys, consultants, and landlords
- Software vendors and subscriptions
- Internal non-clinical business communication

The 5-minute daily inbox routine

Stop checking everything. Check what matters.

The value is not having AI summarize every email. The value is using Claude to surface the few conversations that actually require the owner.

- 01 **Find what needs you.** Ask Claude to identify unanswered or decision-heavy emails from the last 24-48 hours.
- 02 **Group them.** Separate urgent decisions, quick replies, things to delegate, and informational updates.
- 03 **Summarize the context.** For longer threads, have Claude tell you what happened, what changed, and what the sender needs next.
- 04 **Draft the replies.** Have Claude write a concise response using the actual conversation as context.
- 05 **Review and send.** Open the Gmail drafts, check the details, and send only what you approve.

PROMPT · DAILY OWNER TRIAGE

Search my Gmail for emails from the last 48 hours that need my attention as the owner of a dental practice. Ignore newsletters, receipts, automated alerts, and obvious FYIs.

Group the remaining emails into:

- 1) Urgent today
- 2) Needs a decision
- 3) Quick reply
- 4) Can be delegated
- 5) No action needed

For each actionable email, tell me:

- who it is from
- what they need
- the deadline, if any
- the decision I need to make
- your recommended next step

Do not draft anything yet.

5 high-value dental practice workflows

Use Claude where owner time is actually expensive.

PROMPT · MARKETING AGENCY

Search for every email from our marketing company from the last 30 days. Summarize what they completed, what they are waiting on from us, any results they reported, and every open action item. Then tell me the 3 questions I should ask them next.

PROMPT · VENDOR NEGOTIATION

Find the latest thread with [VENDOR]. Summarize the pricing, terms, deadlines, and anything that changed from the previous proposal. Draft a concise reply asking for the best available pricing and clarification on any unfavorable terms.

PROMPT · HIRING

Find all emails from applicants for [ROLE] received in the last 14 days. Create a shortlist based only on the information in their emails. Show me who needs a response, who should move forward, and draft the next-step email for each person.

PROMPT · SUBSCRIPTION / EXPENSE CLEANUP

Search for recurring software, service, and subscription emails from the last 90 days. Group them by company and tell me which ones appear to be renewals, price increases, contracts, or services that may need review. Do not make cancellation decisions for me.

PROMPT · WEEKLY OWNER BRIEF

Review my non-patient business email from this week and give me an owner brief: major decisions, money-related issues, vendor problems, hiring items, marketing items, deadlines, and anything I may have missed.

Make Claude write better replies

Give it rules once. Stop fixing the same problems.

The fastest way to get useful drafts is to tell Claude how you want owner-level emails to sound.

SUGGESTED EMAIL RULES

- **Short:** usually 3–6 sentences unless detail is required.
- **Clear:** answer the question or make the decision early.
- **No corporate fluff:** avoid "I hope this email finds you well" unless you actually want it.
- **Action-oriented:** end with the next step, owner, or deadline.
- **Protect leverage:** do not accept pricing, contracts, or commitments unless explicitly instructed.
- **Sound human:** use your normal tone, not generic AI language.

PROMPT · SAVE THIS AS YOUR REPLY STYLE

When drafting business emails for me:

- be direct, professional, and concise
- lead with the answer or decision
- remove unnecessary pleasantries
- use short paragraphs
- make the next step obvious
- never agree to pricing, contracts, dates, refunds, or legal terms unless I explicitly tell you to
- if information is missing, flag it instead of guessing
- write like a busy dental practice owner, not a corporate communications department

USEFUL FOLLOW-UP COMMANDS

- "Make that 30% shorter."
- "Ask for a better price without sounding cheap."
- "Tell me what I should verify before I send this."
- "Make it firmer without sounding rude."
- "Turn this into a clear yes/no decision."

Use your inbox to delegate better

Not every email belongs with the dentist.

A useful inbox system does more than help you reply faster. It tells you what should stop reaching you in the first place.

EMAIL TYPE	LIKELY OWNER	EXAMPLE
Clinical / patient-specific	Approved clinical workflow	Handle under your privacy/compliance rules
Routine vendor logistics	Office manager	Delivery dates, simple reorders
Scheduling / staffing admin	Practice manager	Non-sensitive operational coordination
Marketing execution	Marketing lead / agency	Asset requests, routine approvals
Financial / contractual	Owner + advisor	Pricing, contracts, renewals, legal terms

PROMPT · DELEGATION AUDIT

Review my non-patient business email from the last 30 days and identify recurring categories of email that I personally handled but could potentially be delegated.

For each category, show:

- examples of the type of request
- how often it appears
- the decision or work I am repeatedly doing
- who on a typical dental practice team could own it
- what rule or SOP would be needed before delegating it

Do not recommend delegating clinical, legal, financial, or sensitive decisions without appropriate review.

The safe way to use AI with practice email

Business inbox help is useful. Patient privacy still matters.

Keep the first version of this workflow focused on owner/admin email. Do not assume an AI connector is automatically appropriate for protected health information just because it can access Gmail.

- **Start with non-patient business email.** Vendors, hiring, marketing, software, accounting logistics, and general operations are the easiest place to begin.
- **Know which account you connected.** Claude can access the Google account you authenticated.
- **Review drafts before sending.** Names, prices, dates, and commitments can still be wrong.
- **Do not let AI guess.** Ask it to flag missing information instead.
- **Set internal rules.** Decide which categories your team may use with AI and which remain off-limits.
- **Check your own compliance requirements.** Privacy obligations vary by jurisdiction, contracts, account configuration, and the data involved.

Simple rule. If an email contains patient-identifiable clinical or health information, do not run it through this workflow until your practice has confirmed the appropriate privacy, security, consent, and vendor-agreement requirements.

THE SCALABLE WEEKLY ROUTINE

WHEN	WHAT YOU DO
Daily	5-minute triage + draft replies
Friday	Weekly owner brief
Monthly	Delegation audit + recurring expense review
Quarterly	Update reply rules and delegation SOPs

Save time on the admin. Then save time explaining dentistry, too.

MOLAR gives dentists and dental teams a growing library of visual patient-education videos built for treatment conversations inside the practice.

ARE YOU A DENTIST OR DENTAL PROFESSIONAL?

Use MOLAR chairside, on an iPad, in consultation rooms, or on TVs around the practice so patients can actually see what you are explaining.

- Visual education for treatments, procedures, and dental conditions
- Useful during consultations and treatment discussions
- Built for phones, tablets, computers, and practice TVs
- A growing library your team can pull from instead of explaining everything from scratch

Explore the MOLAR Patient Education Library. Instead of explaining everything from scratch, show them.



THE NEXT STEP

Stop making content. Start getting patients.

MOLAR is the content engine for dentistry — a patient-education library your practice can run every week without a camera crew, an agency retainer or a blank calendar.

MOLAR TV

01

A streaming library of patient-education video, built for the chair, the waiting room and your feed. Start the 14-day free trial and use it on a real patient this week.

Start the 14-day free trial

MOLAR Social

02

Your practice feed, produced for you. Scripts, edits, captions and a posting calendar that runs off the treatments you already sell. See a live demo of a real practice feed.

Explore MOLAR Social

Book a call

03

30 minutes with the MOLAR team. We look at your site, your market and what you are posting now, then tell you the shortest route to more booked treatment.

Book a call with MOLAR