

THE MONDAY BRIEFING ROUTINE

Before I've opened my laptop on Monday, an AI routine has read my calendar, my inbox, and my project notes — and briefed me in under a minute. The exact instructions.

BY DANIEL RIVERA — DANIEL ON PURPOSE • RIO GRANDE VALLEY, TX • 2026

Monday morning used to be 40 minutes of figuring out what Monday morning was. Now it's a four-section briefing waiting for me at 7:30 — and the last section tells me what to do about it.

01 THE FOUR SECTIONS

SECTION	WHAT'S IN IT
This week	Day-by-day calendar with prep flags — the board meeting that needs a packet, the call that needs numbers
Needs a reply	The important unread emails only — one line each: sender + what they're asking
Open loops	Stalled projects and commitments waiting on YOU — pulled from your notes, one line each
Top 3	The routine's recommendation: the three highest-leverage moves this week, given all of the above

"Top 3" is the section that matters. Data you already have; a recommendation forces the routine to think — and forces Monday to have a point.

02 THE ROUTINE INSTRUCTIONS — STEAL THIS

FILL IN THE BRACKETS, SCHEDULE FOR MONDAY EARLY MORNING

Build my Monday morning briefing. I am [WHO YOU ARE — role(s), org(s), the hats you wear].

1. CALENDAR — Use the calendar connector to list all events Monday through Sunday of this week. Note anything needing prep (board meetings, presentations, client calls, webinars).
2. EMAIL — Search unread threads from the last 4 days. Surface only what matters: [YOUR CATEGORIES — e.g. "funding agencies, my board, contractors waiting on signatures, prospect replies, client mail"]. Ignore newsletters, promos, and notifications.
3. OPEN LOOPS — Read [YOUR PROJECT NOTES / MEMORY FOLDER — a folder of project files with statuses]. For any project marked paused, awaiting, or in-progress, pull out the concrete next actions that are waiting on ME.

Output a single tight briefing in this order:

- ****This week**** — day-by-day calendar with prep flags
- ****Needs a reply**** — the important unread emails, one line each with sender and ask

03 THE DETAILS THAT MAKE IT WORK

- ☐ **Name what "matters" means.** The email section is only as sharp as your category list. Spell out the senders and topics that deserve your Monday attention — and explicitly exclude the noise.
- ☐ **Open loops need somewhere to live.** The routine can only surface stalled projects if your projects are written down with statuses — this is where a second brain pays for itself (Guide N° 02).
- ☐ **Cap the length.** "Scannable in under a minute" is an instruction, not a hope. Without it, briefings bloat until you stop reading them.

04 VARIATIONS

- ☐ **The daily standup** — same structure, today-only, calendar + email since yesterday. Weekdays at 7:00.
- ☐ **The Friday shutdown** — flip it: what did I commit to this week that's still open? What carries to next week? Pairs with the newsletter routine (Guide N° 07).

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THE INBOX TRIAGE ROUTINE

Every weekday at 8am, AI labels whatever slipped through my Gmail filters – and never touches anything it shouldn't. The taxonomy, the instructions, and the guardrails.

BY DANIEL RIVERA – DANIEL ON PURPOSE • RIO GRANDE VALLEY, TX • 2026

AI doesn't replace your email filters – it catches what slips through them. Mine runs every weekday morning, applies an 8-label taxonomy to the strays, and operates under guardrails strict enough that I never worry about it: label only, never archive, never mark read, never touch the protected stuff.

01 BUILD YOUR 8-LABEL TAXONOMY

Mine, genericized – rename to fit your world, but keep it to ~8. More than that and nothing gets found again:

LABEL	WHAT GOES IN IT
Projects & Vendors	The people building things for you – contractors, invoices, change orders
Internal	Your organization's own mail – leadership, finance, HR, committees
Funding & Grants	Agencies, applications, letters of support, signature requests
Leads & Inquiries	Real prospects and requests – the mail that makes money if answered fast
Events & Webinars	Conferences, trainings, industry sessions
Vendors & Promos	SaaS marketing, sales pitches, travel deals
Notifications	Confirmations, security alerts, calendar agendas, bank alerts
Personal	The non-work mail that lands in the work inbox anyway

Newsletters route to topic labels you already read from (e.g. "Industry News," "AI News") instead of a graveyard label.

02 THE ROUTINE INSTRUCTIONS – STEAL THIS

FILL IN THE BRACKETS, SCHEDULE FOR WEEKDAY MORNINGS

Triage my [WORK] inbox ([your@email]) using the Gmail connector.

SAFETY CHECK FIRST: list the account's labels. If my labels [LIST YOUR 8 LABELS] do NOT exist, you are connected to the wrong account – stop, apply no labels, and report it.

My filters already auto-label known senders, so only handle what slipped through:

1. Search threads from the last 24 hours (72 hours on Monday) that have none of my 8 labels.
2. Label each using this taxonomy:
 - [LABEL 1] – [what belongs here, with example senders/domains]
 - [LABEL 2] – [...]
 - [... all 8, plus newsletter routing rules]
3. NEVER touch or apply [PROTECTED]/* labels (they feed my other automations). Never archive or mark anything read – label only.
4. If a sender genuinely fits nothing, leave it unlabeled and mention it in the summary.

03 THE FOUR GUARDRAILS (THESE TRANSFER TO ANY EMAIL AUTOMATION)

- 01 Safety check first.** Before acting, the routine verifies it's in the right account by checking that your labels exist. Wrong account → stop and report, not improvise.
- 02 Reversible operations only.** Labeling can be undone in one click. Archiving, deleting, and marking-read change what you'll see – so they're banned.
- 03 Protect the machinery.** If other automations key off certain labels, name them as untouchable. Automations that edit each other's triggers is how systems quietly break.
- 04 Honest fallback.** "If it fits nothing, leave it and tell me" beats forced categorization. The unlabeled report also tells you when your taxonomy needs a new bucket.

The goal isn't inbox zero. It's that at 8:05 every morning, everything in the inbox is already sorted into "what kind of thing is this" – and you spend attention only on the mail that deserves it.

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THE GRANT WATCH ROUTINE

I stopped finding out about grants two weeks before the deadline. Every Monday at 8:30, an AI routine scans my funders and reports only what's actionable — in a 30–45 day window.

BY DANIEL RIVERA — DANIEL ON PURPOSE • RIO GRANDE VALLEY, TX • 2026

Most organizations discover funding opportunities on someone else's timeline — a forwarded email, a conference mention, a deadline that's already too close. This routine flips it: the scan happens every Monday, and the report only contains things you can actually act on.

01 THE 30-45 DAY WINDOW

The core design decision: alert on deadlines **30–45 days out** — far enough to realistically complete an application (letters of support take weeks), close enough to create urgency. Anything inside 30 days gets flagged separately as tight-turnaround, so you consciously choose to sprint or skip.

02 THE THREE-SECTION REPORT

- 01 Apply-window alerts** — deadlines 30–45 days from today. Each with: program, funder, deadline, days remaining, award range, a one-line fit assessment for YOUR org, and the link.
- 02 Tight turnaround — heads up** — strong fits closing inside 30 days, clearly marked.
- 03 Milestones & required events** — applicant webinars, letters-of-intent due dates, pre-registrations. The invisible stuff that quietly disqualifies you from a future application if missed.

The anti-padding rule does the heavy lifting: "If nothing qualifies in a section, say so in one line — do not pad." A one-line week costs you ten seconds. A padded report trains you to stop reading.

03 THE ROUTINE INSTRUCTIONS – STEAL THIS

FILL IN THE BRACKETS, SCHEDULE FOR MONDAY MORNING

Run the weekly grant watch for [WHO YOU ARE – role, organization, place, and the eligibility facts that matter: population, rural/urban, org type]. Today's date matters: compute the 30-45 day planning window from it.

Use web search to check current funding opportunities from:

- [FUNDER 1 – e.g. USDA Rural Development] – [their site]
- [FUNDER 2 – e.g. EDA] – [their site]
- [FUNDER 3 – e.g. your state's commerce / agriculture / water agencies]
- [FUNDER 4 – e.g. your regional foundations]
- Grants.gov filtered for [your field] + [your eligibility]

Report ONLY items that are actionable, in three sections:

1. ****Apply-window alerts**** – deadlines 30-45 days from today. For each: program name, funder, deadline date, days remaining, award range, one-line fit assessment for [YOUR ORG], and link.
2. ****Sooner than 30 days – heads up**** – anything closing inside 30 days that is a strong fit; mark clearly as tight-turnaround.
3. ****Milestones & required events**** – applicant webinars, pre-application deadlines, letters-of-intent due dates, registration cutoffs. Include date, time, and registration link.

If nothing qualifies in a section, say so in one line – do not pad.

Append the dated report to [YOUR GRANT WATCH FILE] (create if missing, newest entry at top, ## heading with the date).

Context: we already have [CURRENT AWARDS / IN-PROGRESS APPLICATIONS] – also flag reporting deadlines and renewal dates related to those.

04 FIELD NOTES

- ☐ **The eligibility line is everything.** "Small rural community, under [X] population, [your state]" changes which programs qualify – give the routine the facts a grant writer would ask for.
- ☐ **Name YOUR funders.** Generic scanning produces generic results. List the 5-6 agencies that actually fund your kind of work.
- ☐ **Keep the report file forever.** A year of dated entries becomes your funding institutional memory – what came up, what you skipped, what cycles repeat.
- ☐ **Tell it what you've already won.** Then it flags reporting deadlines on existing awards too – the ones that actually get organizations in trouble.

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