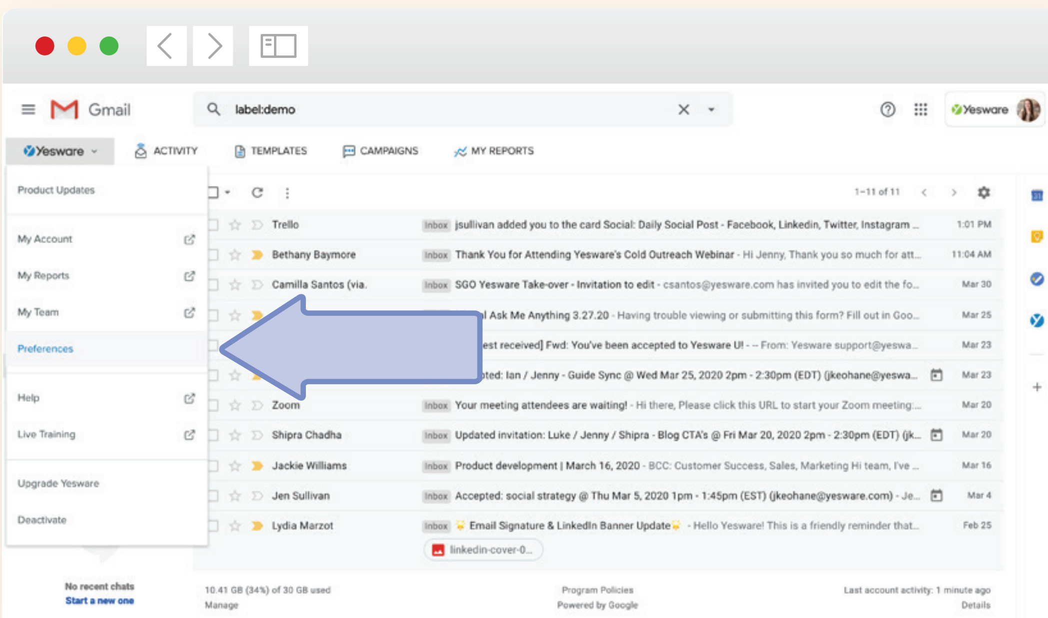
Gmail Best Practices Guide:

Tactical Workflows to Drive Better Performance for Sales Professionals



Yesware

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Introduction

"Volume is way up, deliverability is way down, and the signal-to-noise ratio is at an all-time low."
Joel Stevenson, CEO at Yesware

Sales professionals today are facing ongoing struggles getting through the clutter of recipient's inboxes. The problem is many salespeople still persistently use the 'spray and pray' method that consists of sending out mass numbers of generic outreach.

With all of the information we have at our fingertips to help us understand buyers and tools to help us be more productive and personal, you would think the way we communicate would get better, more targeted, and way more personal. Unfortunately, the noise filling the market is at an all-time high.

Yesware's focus is on helping salespeople spend their time where it matters by helping them understand where they should invest more time and where they should cut their losses. Yesware helps sales professionals understand what is/isn't working so they can make data-driven decisions and provide them the tools to speed up their inbox tasks and increase productivity.

In this guide, we walk you through the workflow of using Yesware's features and functionalities to help you move through your sales process more quickly and efficiently. Throughout the guide, we intertwine our best practices and tips and tricks to help you get the most out of our software and drive better performance for your team.

How Yesware works for Gmail

1. Installation

Installing Yesware is extremely simple and takes no more than about a minute.

You can install Yesware for Gmail directly from **our website**. We offer a trial to all new users that can be **accessed here**.

Once you visit that link, click on your inbox type, Gmail, and then you'll need to sign in to your email and grant Yesware access. It's as easy as that!

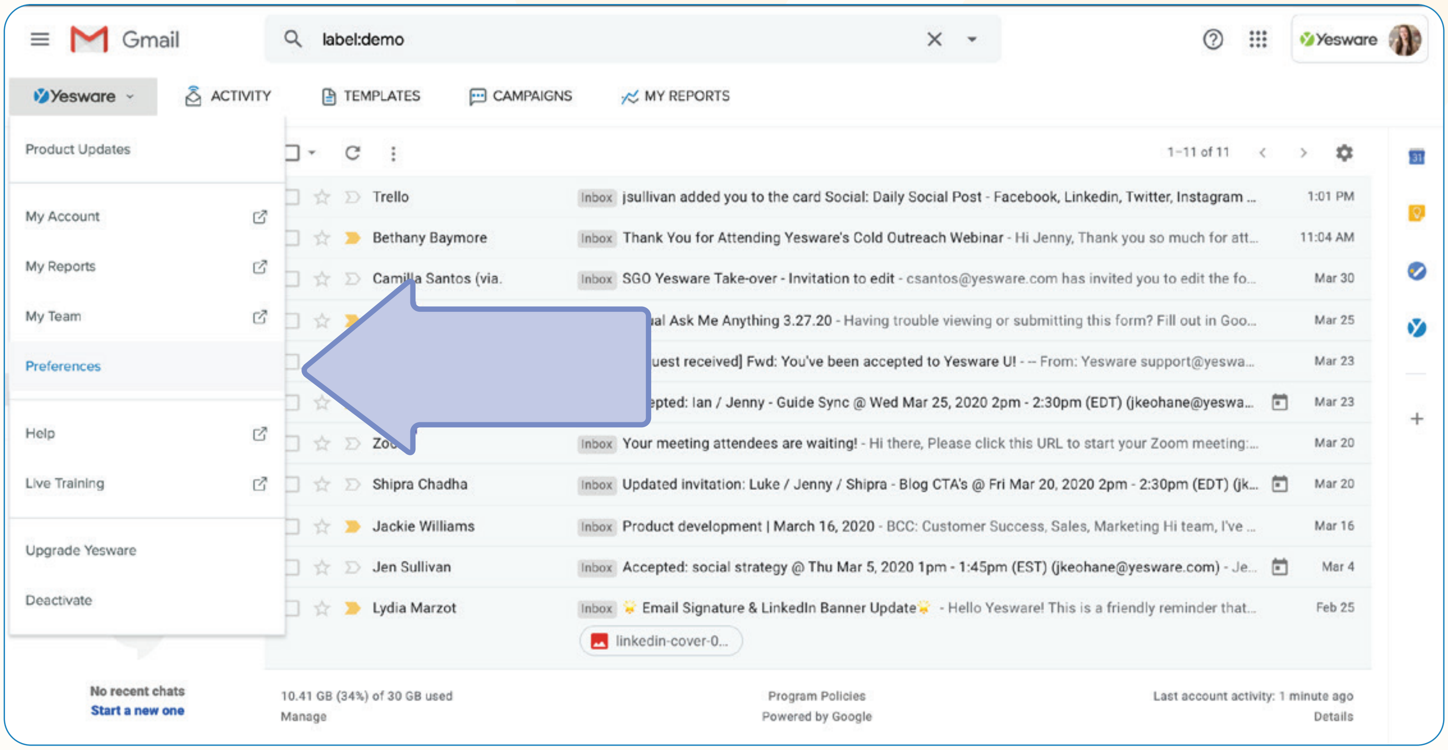
If you're on our Enterprise plan, you will also need to authenticate to Salesforce (essentially sign in and grant access), and you will be prompted to do so.

If you already have an existing account, you can use our **direct install links for Gmail**. It won't overwrite your existing account; it will just ensure you go through the entire installation flow.

In order to use Yesware, confirm that **your browser and operating system are supported here**.

2. Preferences

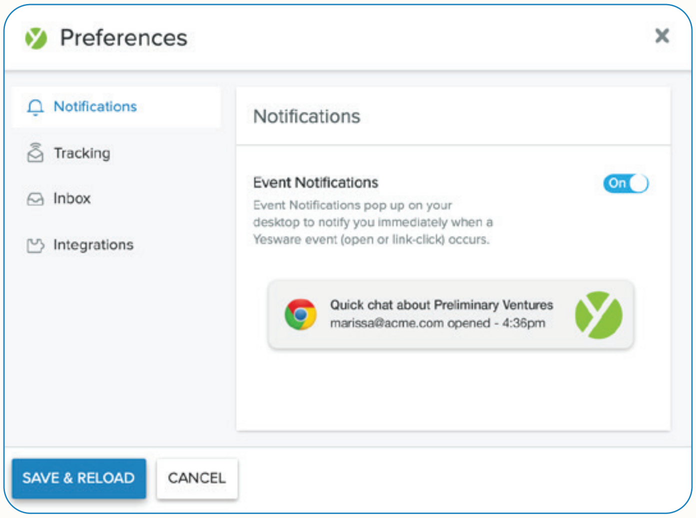
Visit the “Yesware” drop-down menu in the top left of Gmail. When you select “Preferences”, a pop-up window will appear with options to toggle on/off various features.



In the preferences menu - you will see Notifications, Tracking, Inbox, and Integrations. Make sure to click the “Save & Reload” button after making changes.

Notifications

There is a toggle to turn on/off event notifications which is a pop up that notifies you real-time when a recipient opens your email or clicks a link you sent. Turn this feature on if you want to stay alert and get real-time notifications when prospects open/interact with your emails so you can act accordingly.

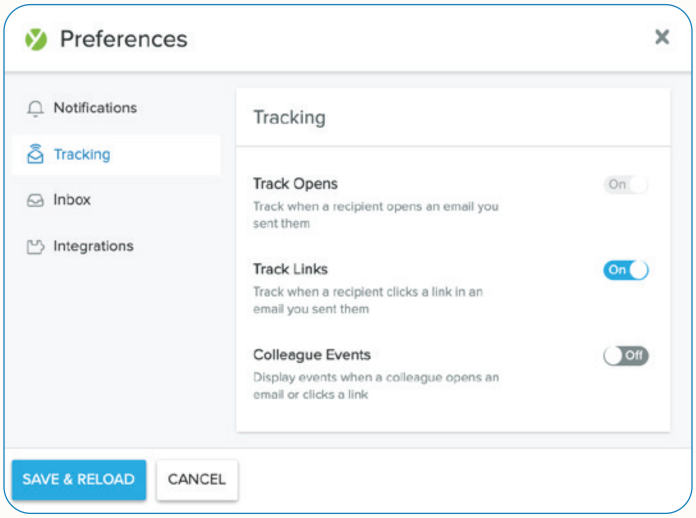


Tip:

Yesware customers have found that following up a pop-up notification a minute or two after with a phone call increases their call connection rate because your name and information are top-of-mind.

Tracking

"Track Opens" is set on by default but "Track Links" is set off. Make sure to turn this feature on if you want to get a sense of who is clicking on links that you're sending. This helps give you an indication of their interest level - whether your recipient skimmed your email or was interested and took the step to click the attachments you included to learn more. Turn "Colleague Events" on if you want to also be notified about colleague interaction.



Tip:

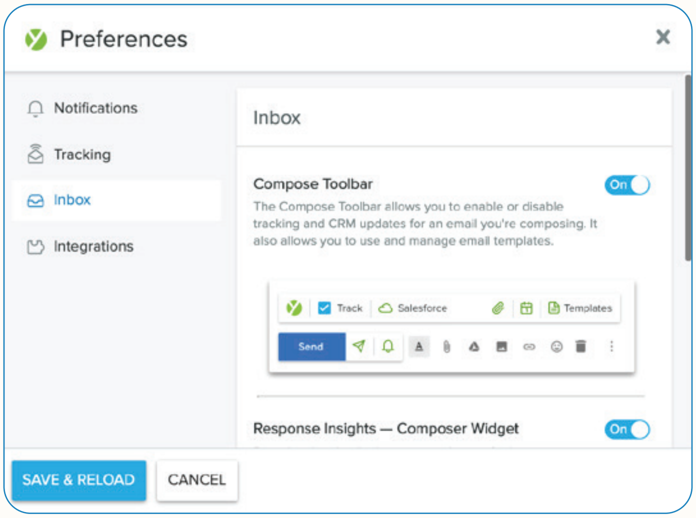
Unless you're a manager, turn colleague events off to focus on customers/prospects.

Inbox

It's important to have your Compose Toolbar on - this toolbar allows you to enable or disable tracking and CRM updates for emails you're composing, as well as use and manage your email templates. This toolbar allows you to work quickly and efficiently.

We recommend keeping response insights on as well - this feature provides data-backed recommendations for how your message can be improved.

Lastly, there's an option to "Add a Recipient to a Campaign from an Email" this campaign button allows you to quickly add a single recipient from an email thread to an existing campaign.

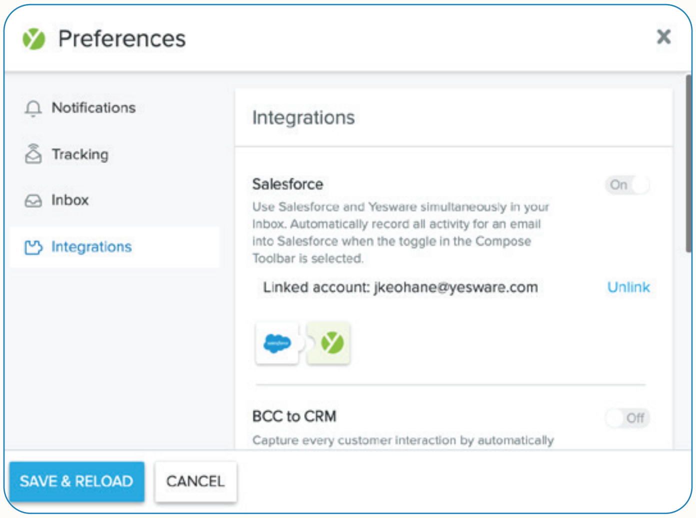


Integrations

If you have an enterprise license with Yesware, under the integrations tab, make sure to toggle on Salesforce and link your account. Once you have that setup, your emails are going to automatically sync to Salesforce.

We also offer a variety of CRM solutions for Pro and Premium users using our BCC email feature to automatically send a copy of your emails into your CRM. Using this feature, you will no longer need to manually add the BCC address to all your emails. After a quick setup, Yesware will take care of this for you and all your outbound emails will be sent to your CRM.

Lastly, make sure to toggle on LinkedIn Sales Navigator, this is displayed in your sidebar and gives you the information you need to create valuable messages and connections.

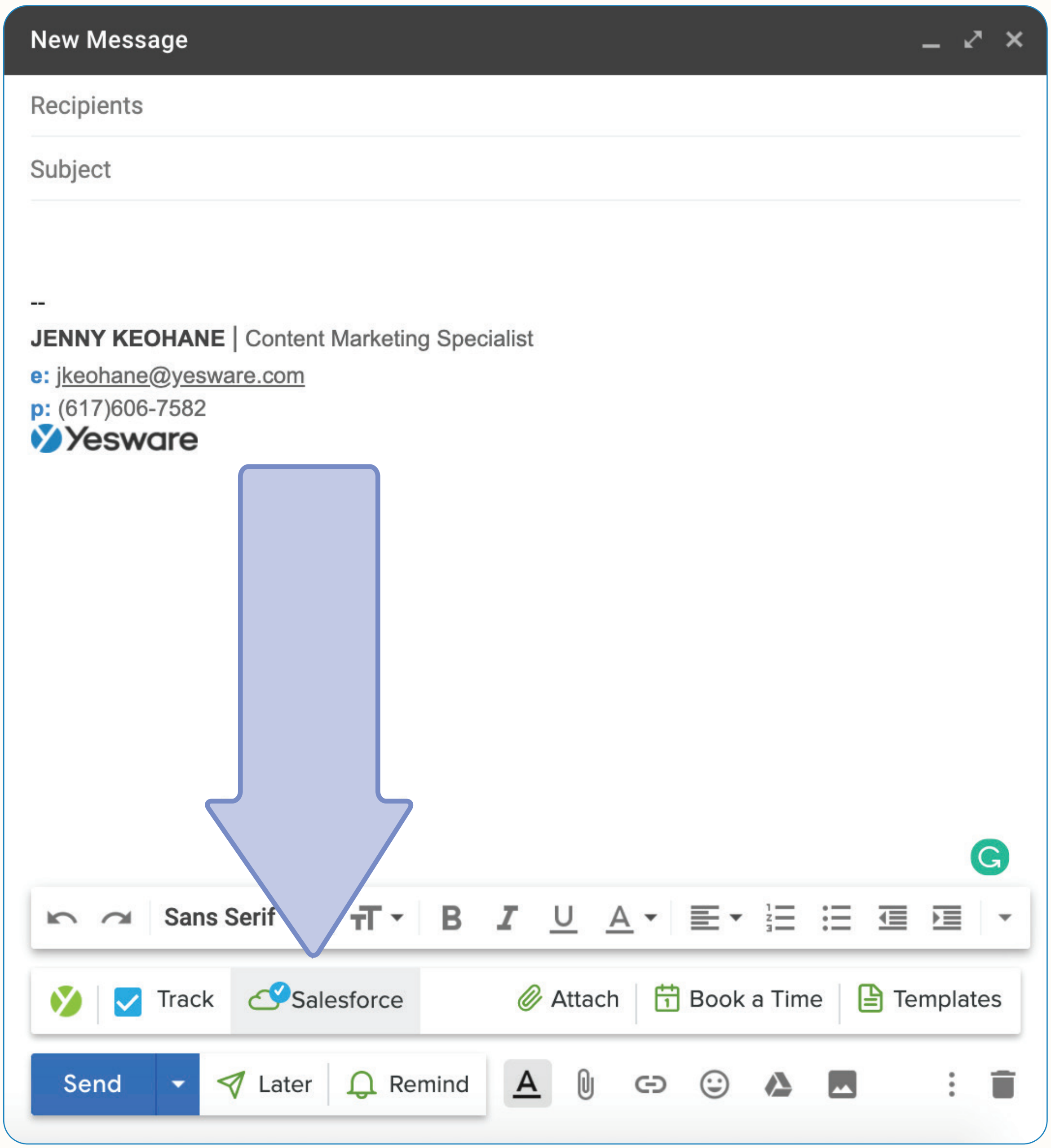


3. Salesforce Integration

Yesware's Salesforce Integration allows you to set your data entry to autopilot, create contacts, leads, and tasks directly from your inbox, and sync your google calendar events directly to Salesforce and associate them with a contact or lead.

To get started with Salesforce Integration, make sure you've authenticated with Salesforce in your preferences as shown above.

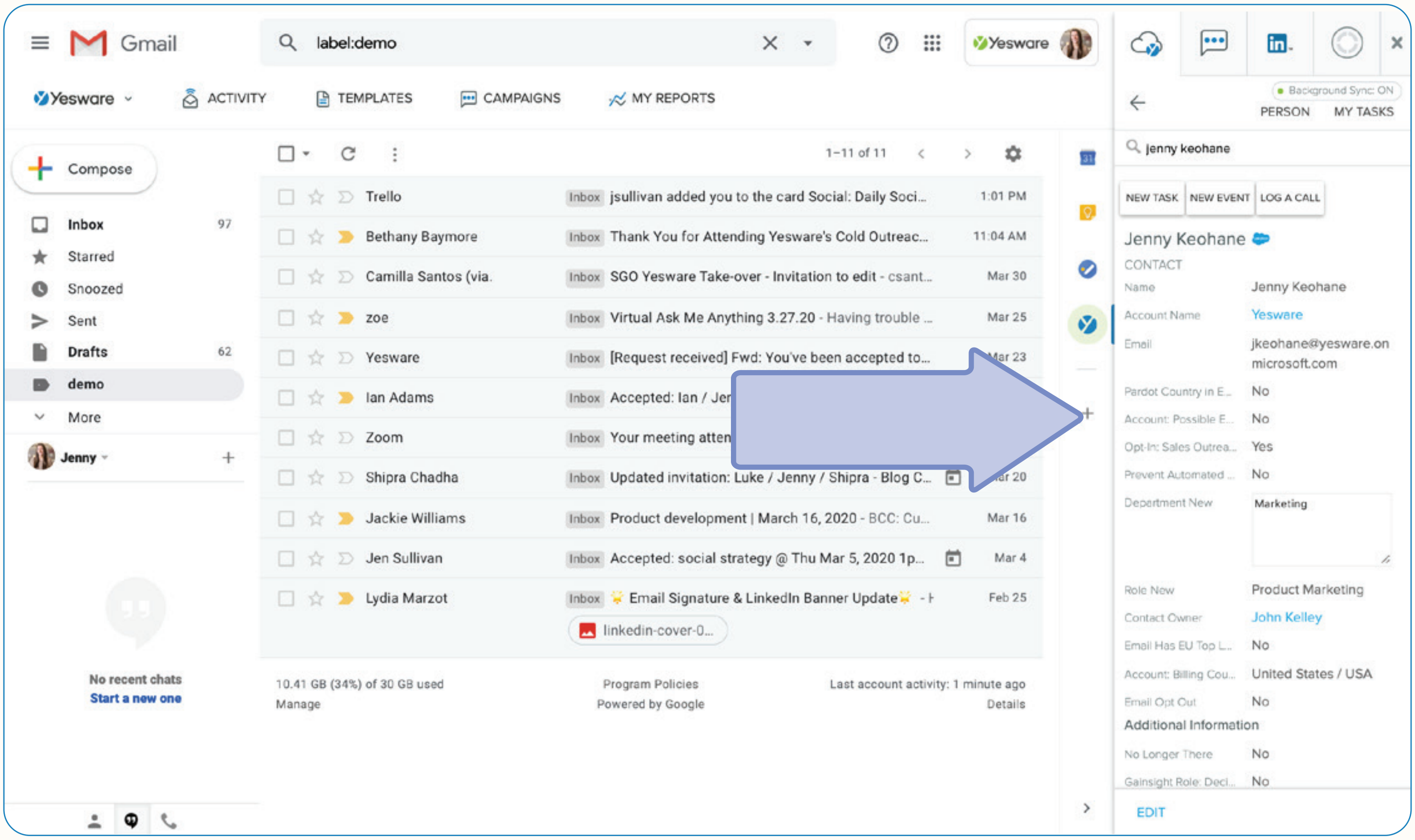
When you open up a compose email, any time you're emailing a recipient who has an email address that matches the email address of a contact or lead in your Salesforce environment, this email and the subsequent engagement will sync over to Salesforce.



Also - The Salesforce sidebar puts Salesforce right in your inbox so you don't have to leave.

With this sidebar you can search for people, view their information, activity history, opportunities, create new tasks, create events, log calls, etc. You can also edit and update Salesforce data directly from this sidebar - allowing you to move quickly and never having to leave your inbox.

When crafting an email to a recipient in your Salesforce environment - this sidebar will pull up their contact or lead record so you can see custom fields and activity history. This allows you to see all information you need while crafting your personalized message.

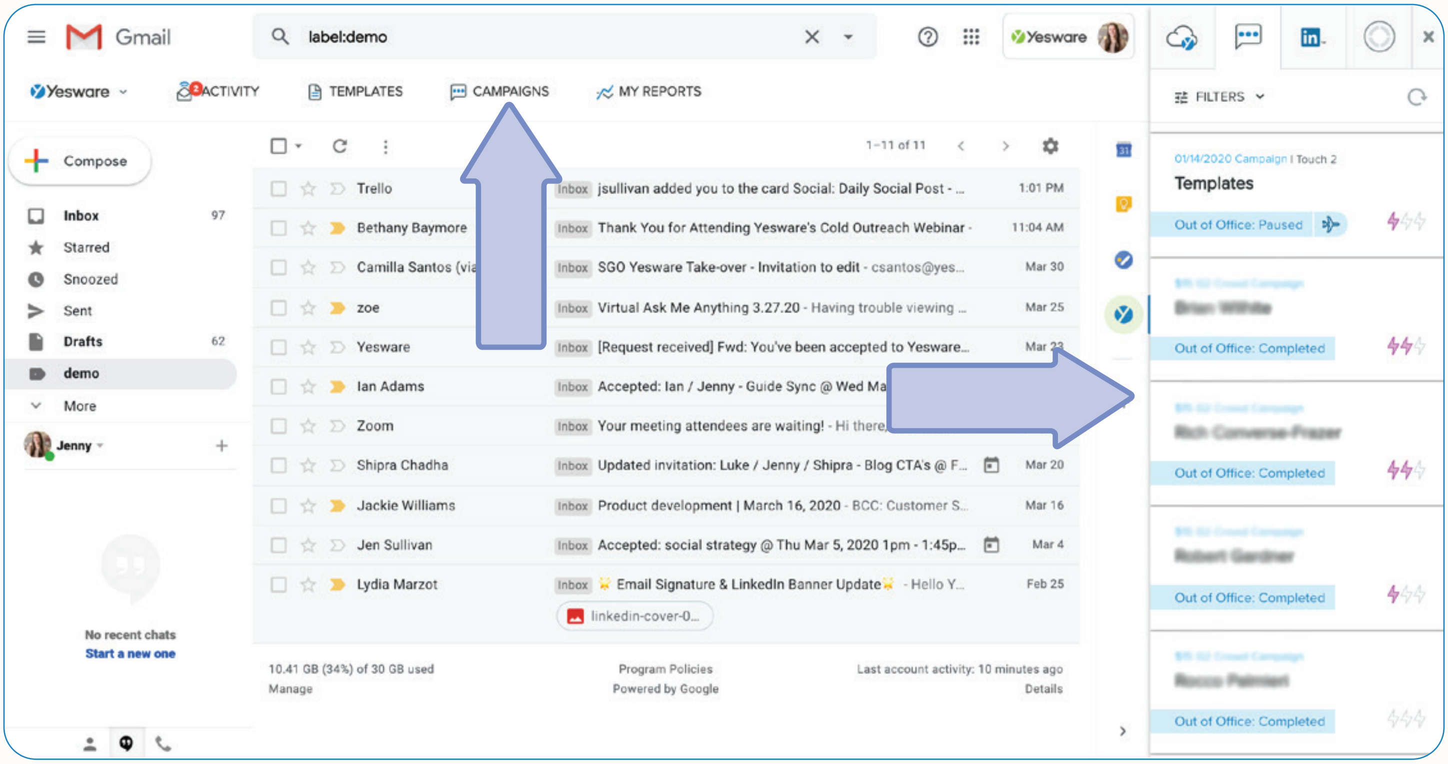


Prospecting

Creating Campaigns

Campaigns allow you to craft personalized and customizable multi-touch messages to a variety of prospects that you can create and manage right from your inbox.

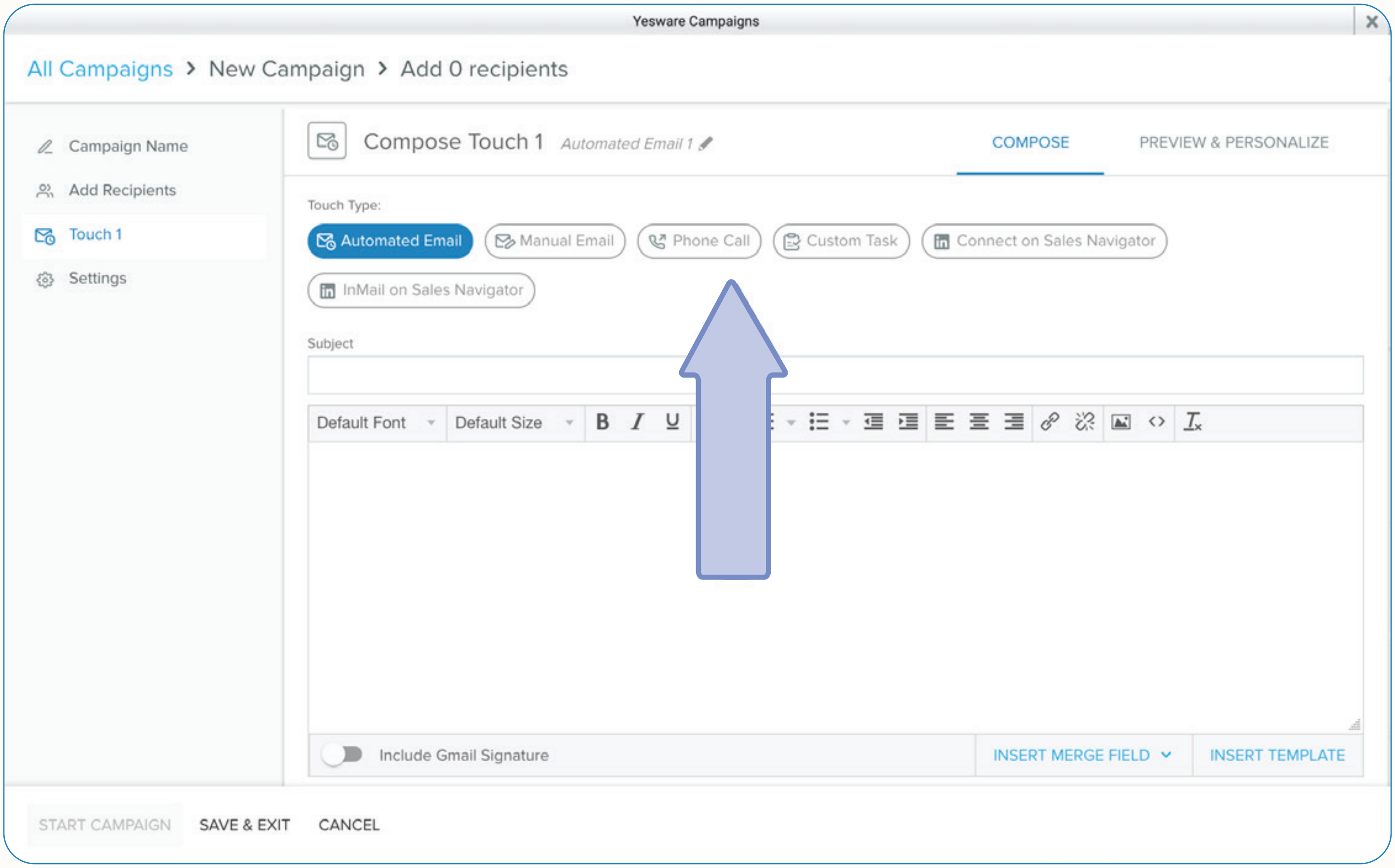
Campaigns live in 2 places: the campaigns dashboard at the top of Gmail, and within the Yesware sidebar there is a campaigns tab.



Yesware makes creating campaigns quick and easy.

To add recipients: you can import a contact or lead list from Salesforce, search for people in Salesforce, add them manually, or upload a CSV file. We recommend uploading a CSV file - it's an easy way to upload all recipient email addresses along with their information in the click of a button.

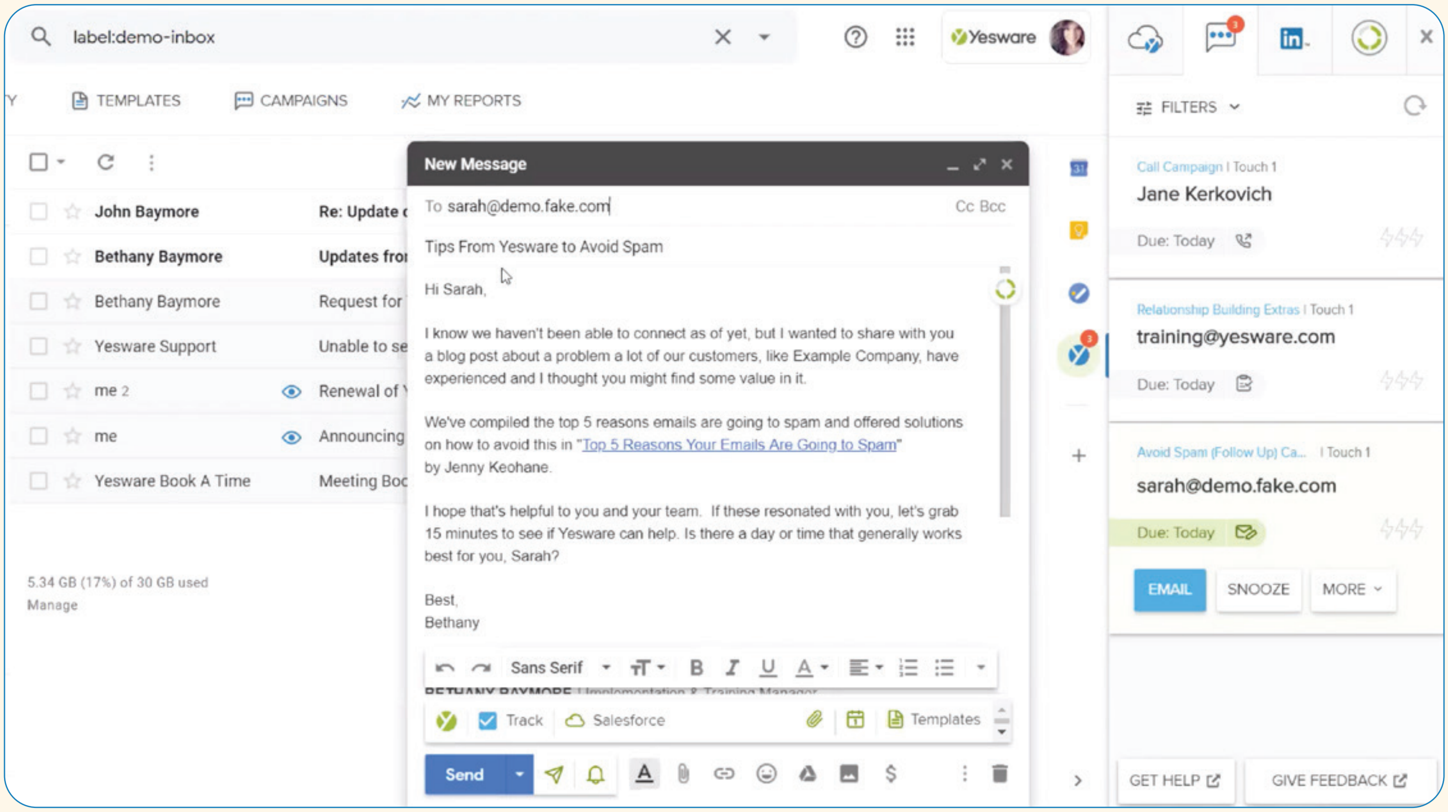
The touches section is where you build out your plan of how you want to reach out to your recipients. There are 6 different touch types - automated email, manual email, phone call, custom task, connect on sales navigator, and InMail on Sales Navigator. Test different touch types and see what works best for you and your customers.



Tip:

We recommend 7-9 touches for cold outbound campaigns. On average, it takes at least 5 follow-ups after the initial contact before a customer says yes. So make sure to always schedule multiple touchpoints, leaving a few days in between each email.

The Campaigns sidebar populates to-do cards for your manual emails, phone calls, and custom tasks. The Campaigns sidebar will remind you to send the email or phone call with the email or script you have created. You can snooze the task or mark as done and it will check it off the list.

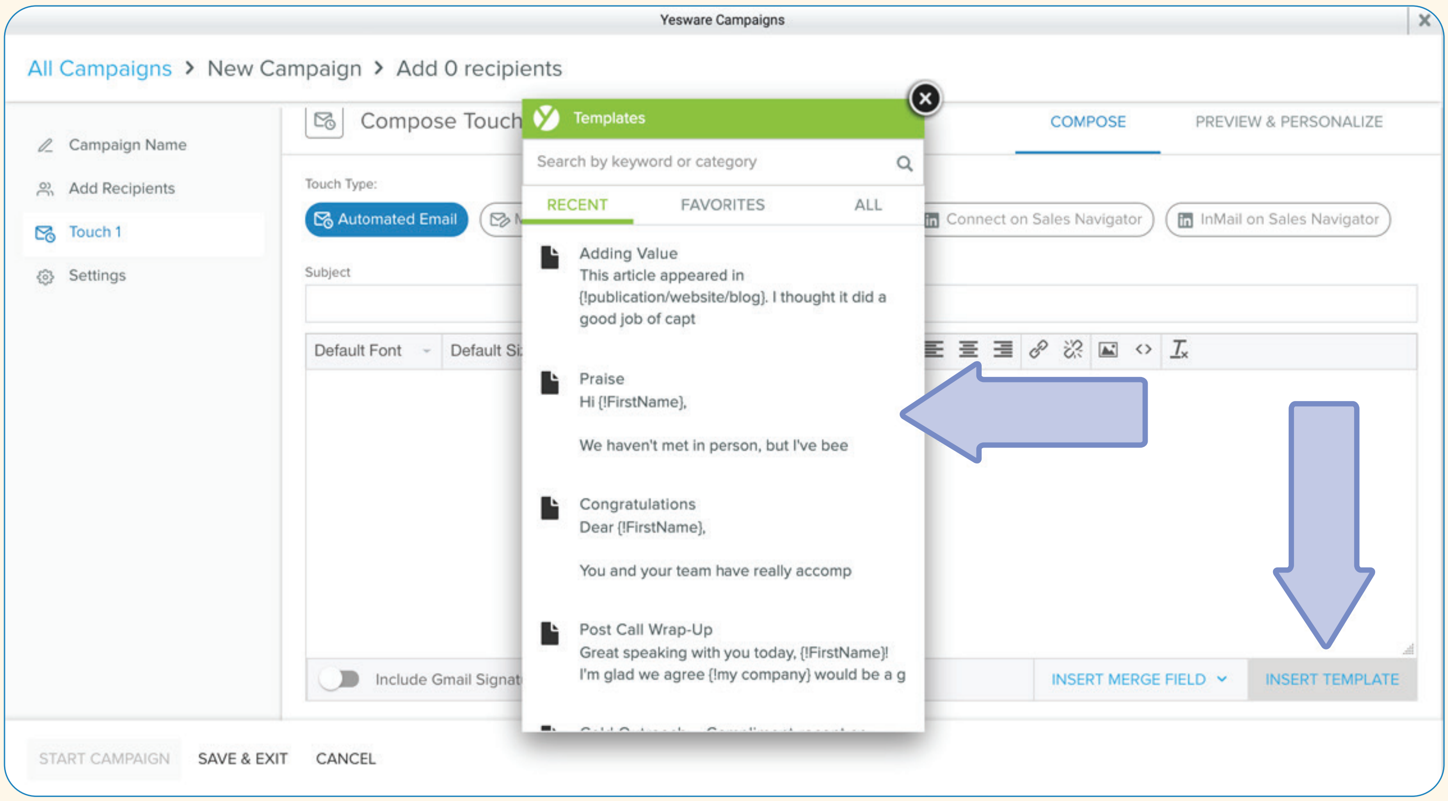


Tip:

We recommend using manual stages in campaigns for your high-value targets. When you use manual stages, it allows you to make relevant personalizations to stages based on link clicks. That way you can reference relevant info from the content recipients engaged with or share more relevant content in your follow ups.

When it comes to composing the content of your campaign, it will save you tons of time inserting templates. You can insert a template by clicking “Insert Template” at the bottom right of your message.

Save your templates into folders so you can easily access them.



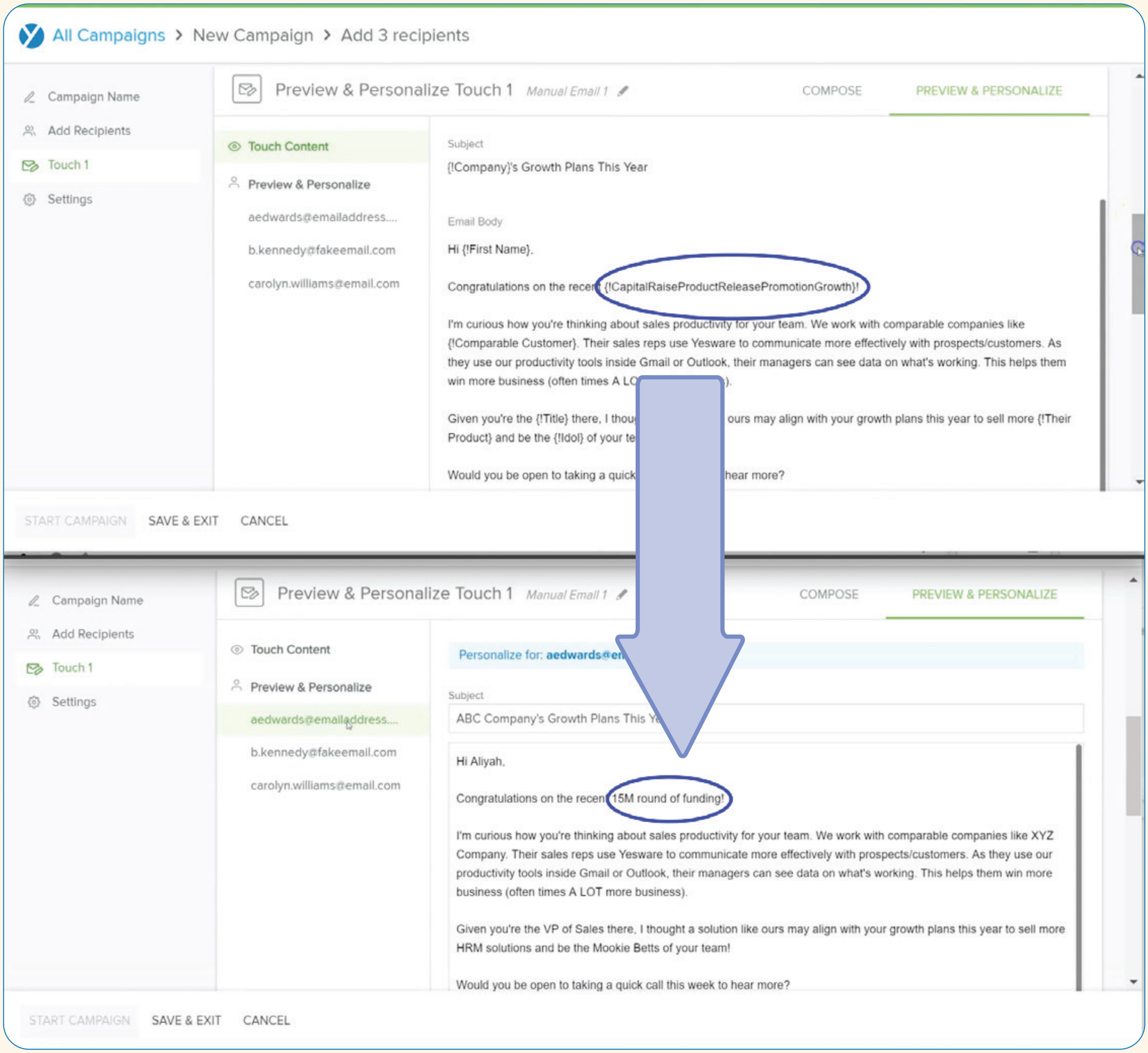
Tip:

To save time, utilize campaigns in a way that you can re-use them (i.e. creating an introduction campaign for cold outreach). This will allow you to use the same campaigns over and over without having to create any new content, you can adjust the touch content to update anything you need, and include various merge fields so all messages are personalized.

When creating templates and inserting merge fields, don’t count job title and company name as personalization since everyone reaching out knows these. Incorporate some differentiating factors. Try bringing up something about them, a compliment about a recent accomplishment, promotions, social proof of companies that are similar to the recipient’s, etc.

Tip:

When uploading a CSV, if you match your column headers to your merge fields, when you go to “preview & personalize” those merge fields will automatically fill in. These will make your emails super personable while saving you time manually typing each of these merge fields into your message.

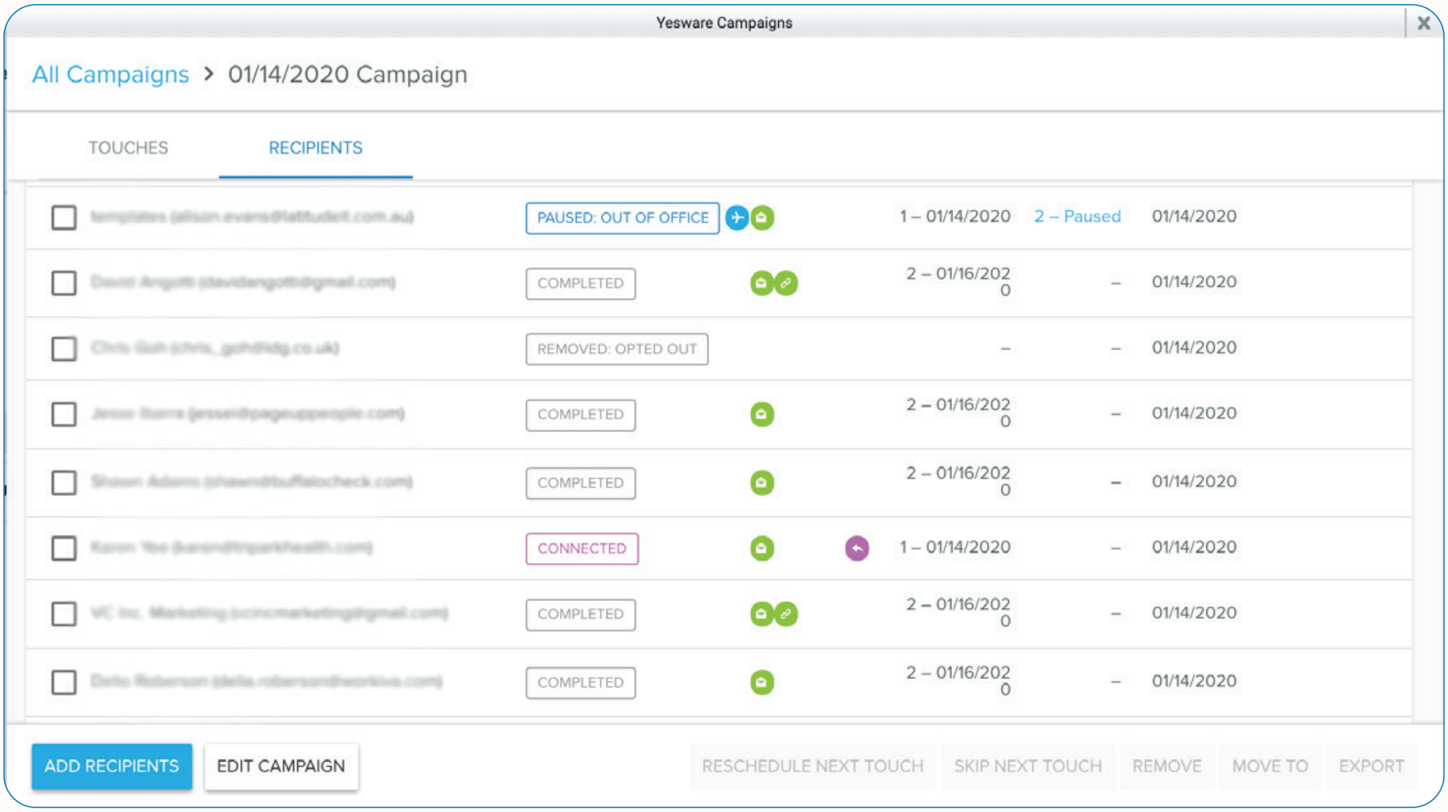


Managing Campaigns

Yesware makes it very easy to go in and edit your campaign as needed after clicking send.

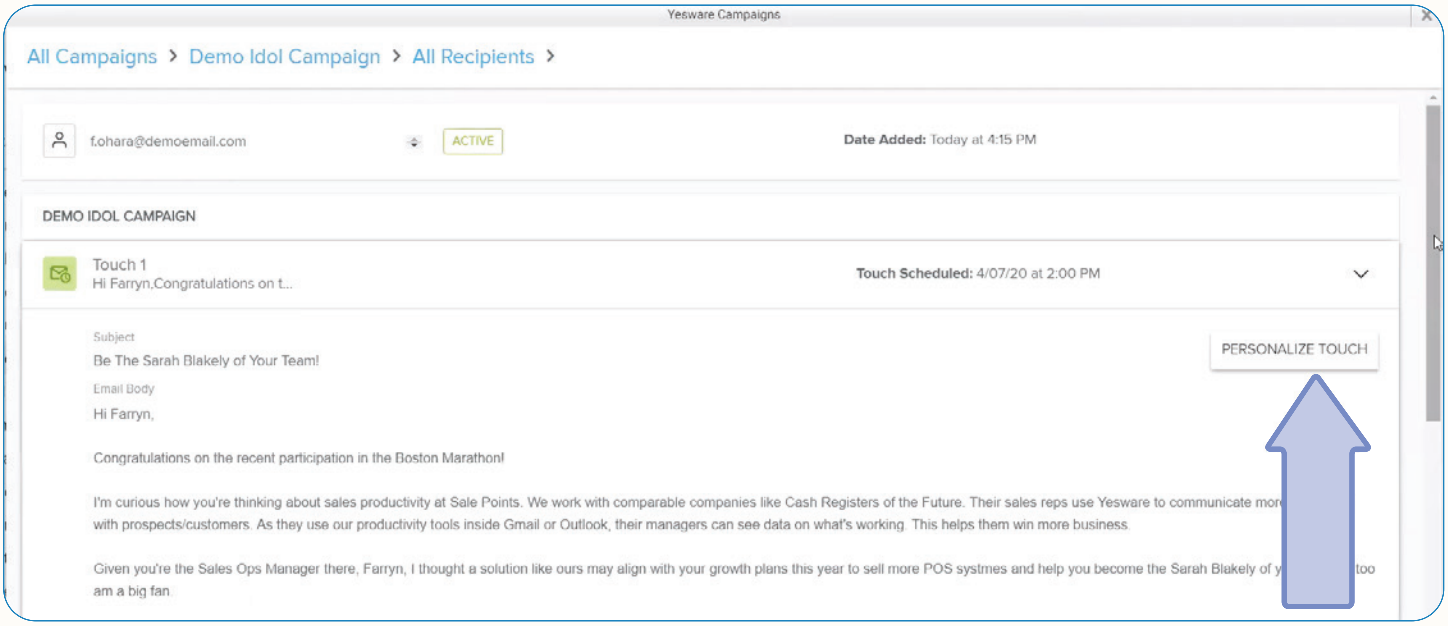
Once you send your campaign: you can view all recipient's interactions, edit next touches, reschedule touches, skip touches, or even move individuals from one campaign to another.

Under the Recipients tab: view all interactions - email opens, link clicks, attachment views.



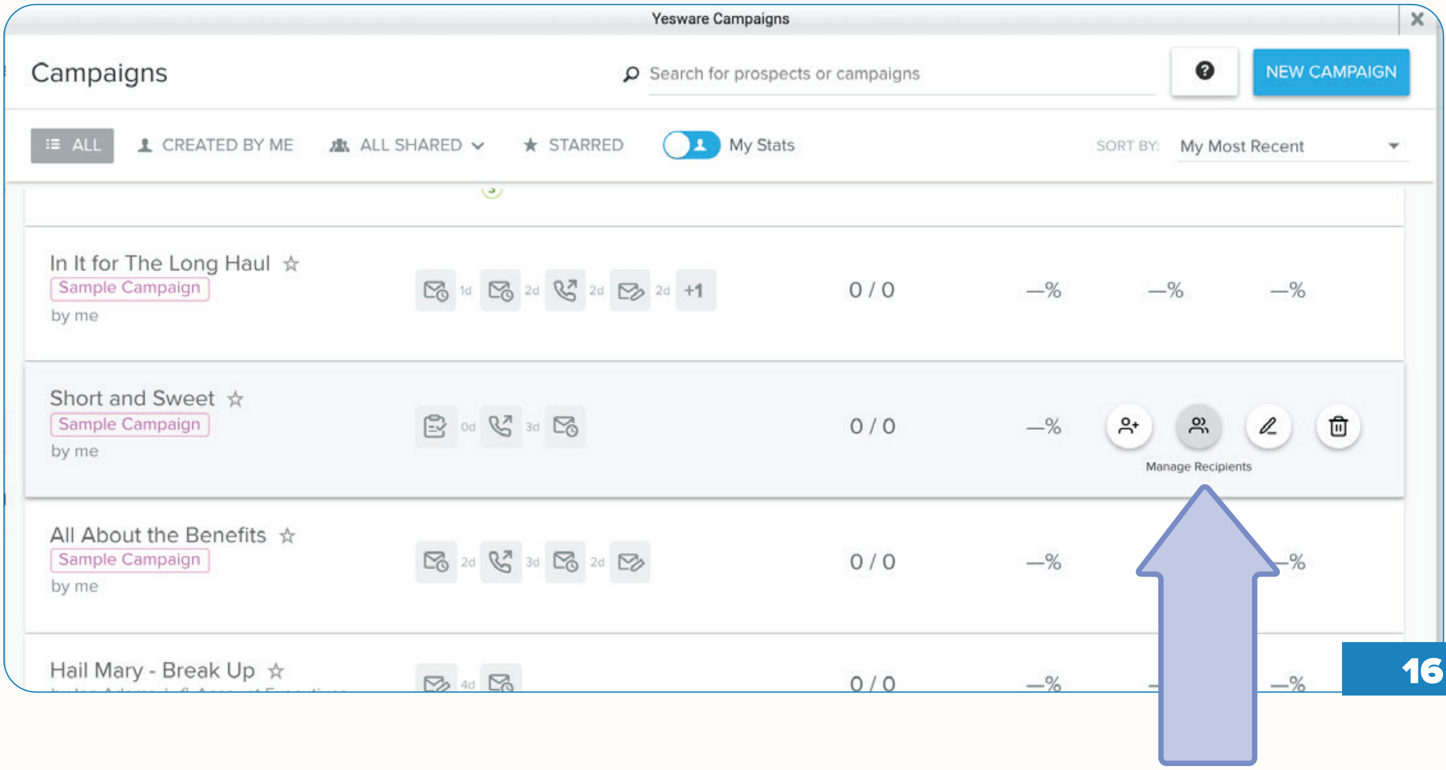
Let's say you learn some new information about a prospect and want to go in and add that to your future touches, click on the recipient, and you will view all touches going out to them. Click the "Personalize Touch" button on the touch you want to edit.

You can then edit your message accordingly.



Or let's say you get a call in response to one of your campaign emails and you want to remove them from the campaign so they don't get any future touches.

To do that - find the campaign and when you hover over it, some buttons will appear, click the "Manage Recipients" button.



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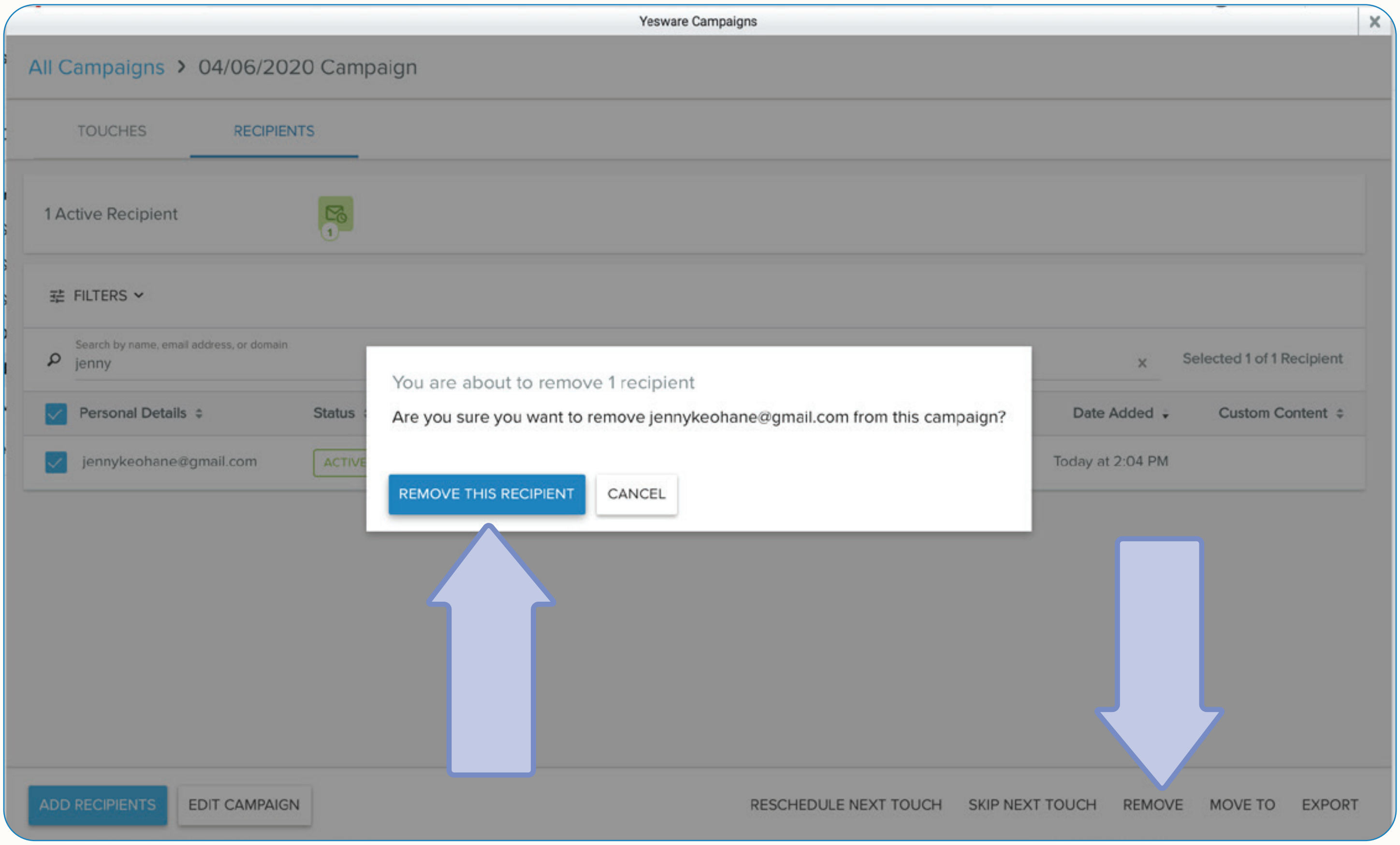
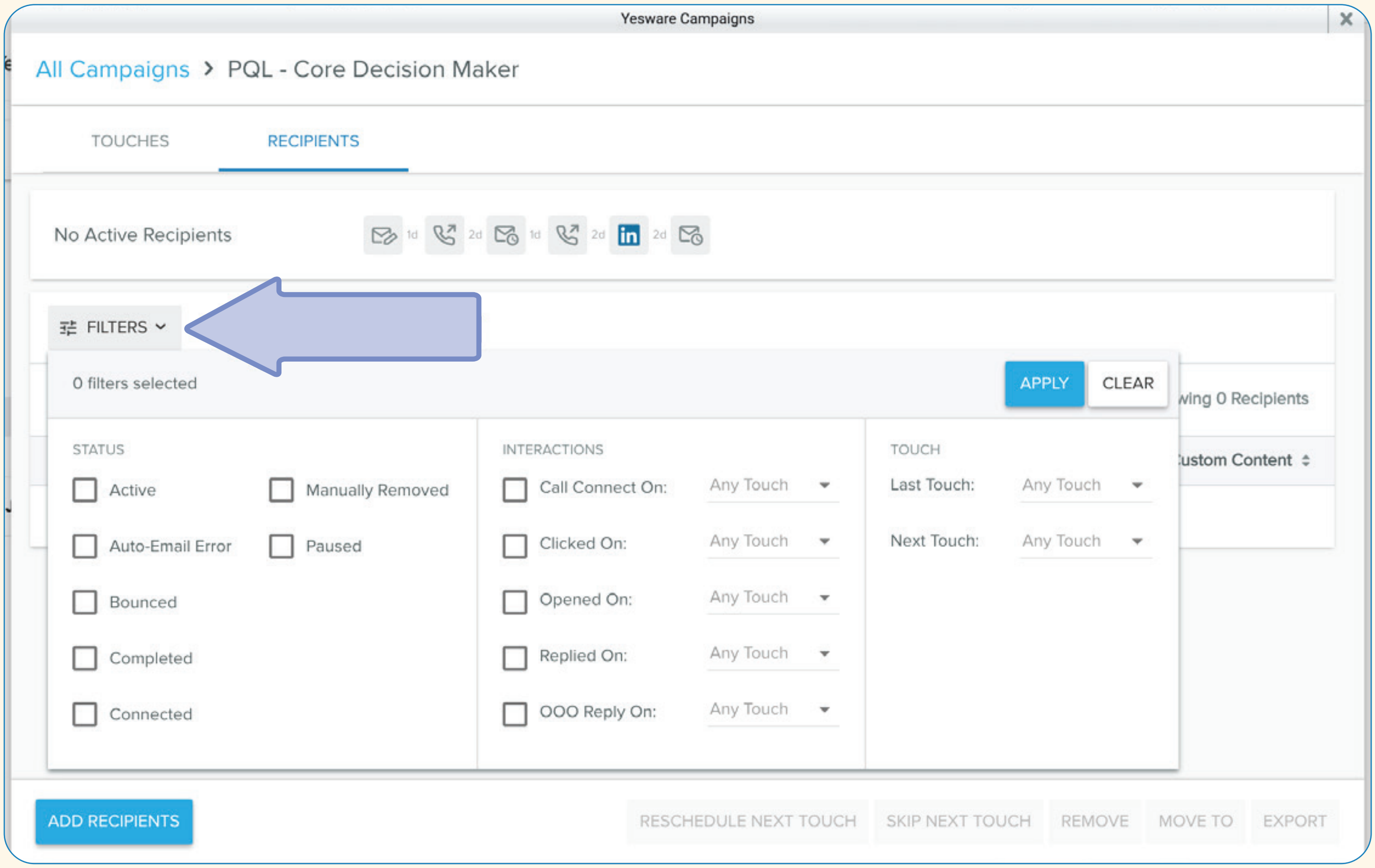


No matter the instance - Yesware Campaigns make it easy to go in and make desired changes.

Tip:

Use "Filters" to filter your recipients. This can help you in various aspects, such as if you want to see all bad email addresses so you can clean up your contacts list, or you want to see who has clicked on a link you've sent in any of your touches.



Campaigns are very easy to navigate, customers find the interface seamless and straightforward - all the information you need is a click away and the buttons and designs in the Campaigns window make creating and editing your campaigns effortless.

If you want to see a full tutorial on setting up and maintaining your campaigns - **visit Yesware U** to watch free in-depth demo videos.

Scheduling Meetings

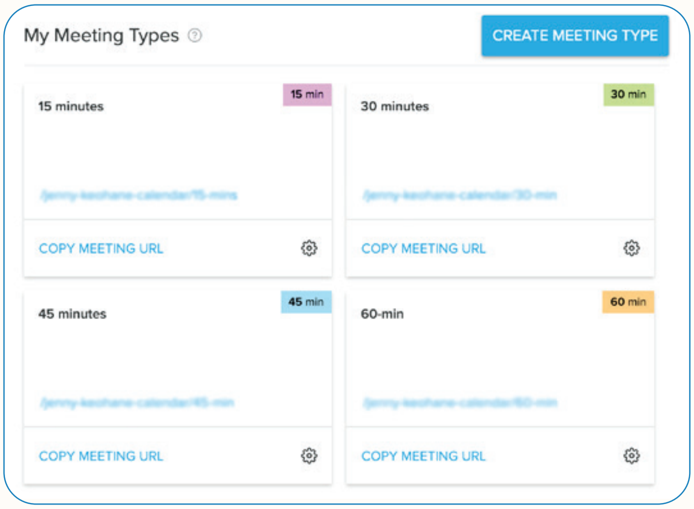
Meeting Scheduler

Our new Meeting Scheduler feature is replacing our Book a Time feature with added advancements like a live, evergreen meeting link and the ability to create different meeting types.

Meeting scheduler eliminates the back-and-forth that comes with scheduling.

You can edit your meeting URL and meeting types **HERE**.

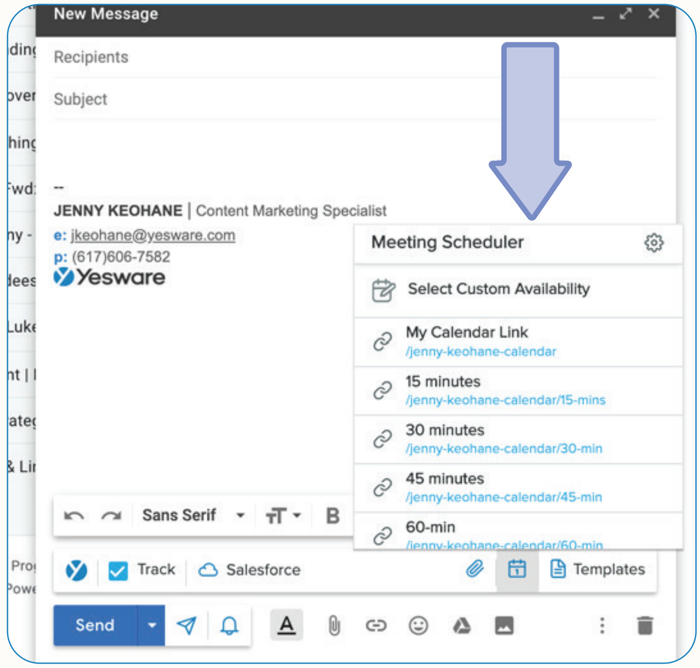
You can set up your different meeting types, meeting name, location, description, and edit your personalized URL to whatever you'd like.

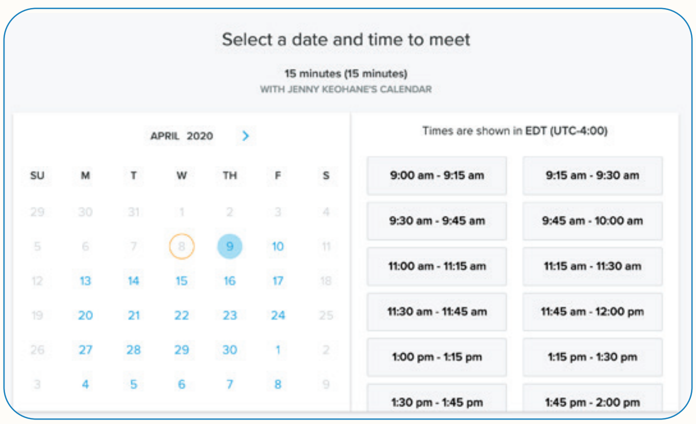


Tip:

Create meeting types that reflect the different meetings you routinely have – think Discovery Calls (15 mins), Intro Calls (30 mins), Demos (60 mins), etc. For enterprise accounts, it may be best to propose a time directly and include a link.

From your Compose Window or by pasting your live link, insert your meeting link into your email. Your invitee will be able to see all available times on your calendar. For added impact, insert into a Template or Campaign and watch your calendar fill up.





When clicking the link, invitees will see all available slots in your calendar – reflected in their own time zone – so they can quickly confirm a meeting time that works for them.

When your invitee confirms a time, the meeting details will be added to both of your calendars and each party will receive a confirmation email. It's as easy as that.

Tip:

In the description of your meeting, put the objective of the meeting, your dial-in information, and agenda items/topics you'd like to discuss for each meeting type. This will help inform your invitee what the meeting will look like/what to expect. It also shows the prospect that you're prepared.

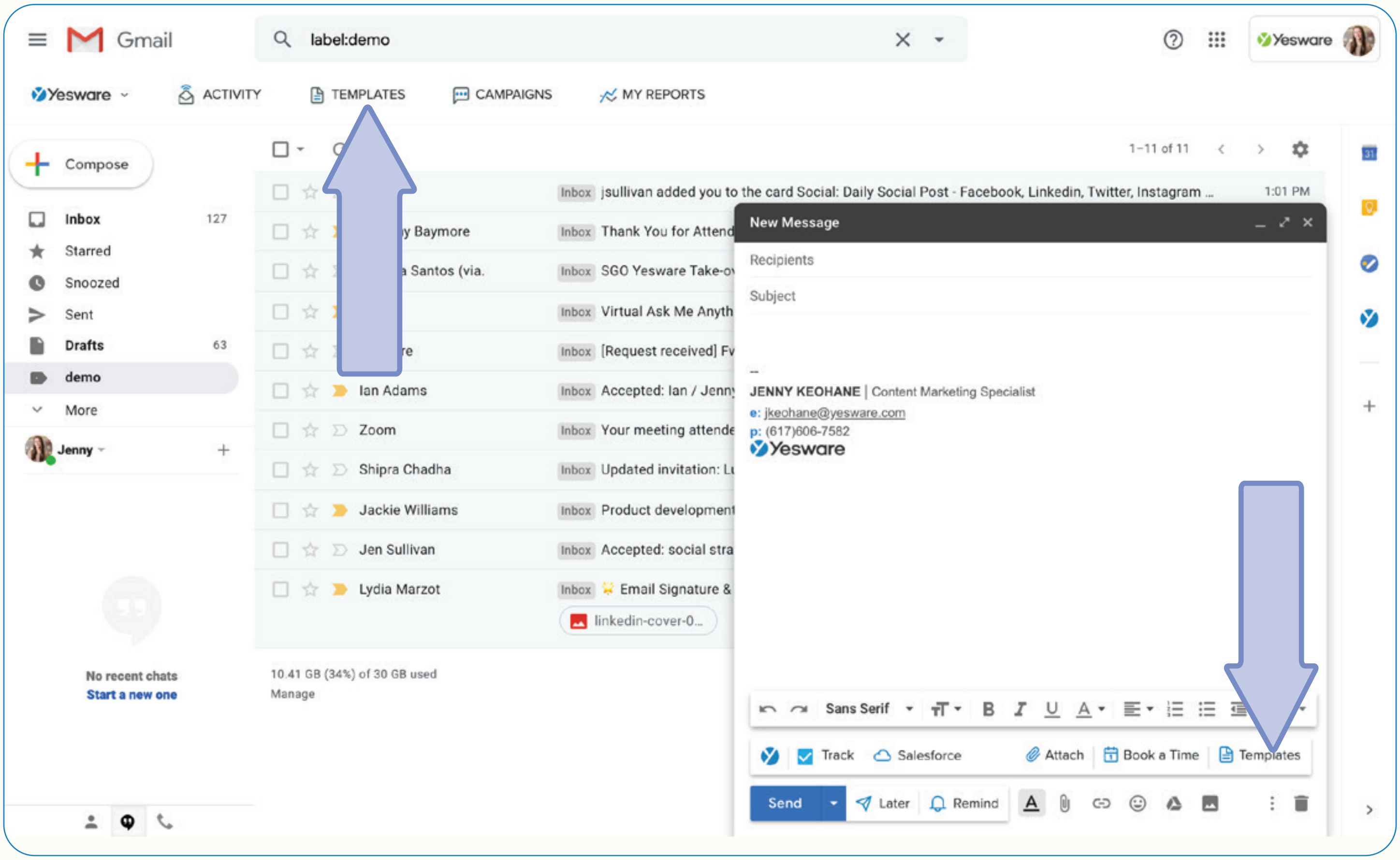
Managing Follow Up

Templates

Templates are at the core of Yesware—they let you create personal, customized messages for every stage of your process. Templates allow you to send rich and complete emails in a fraction of the time it would take to draft that message each time you needed it.

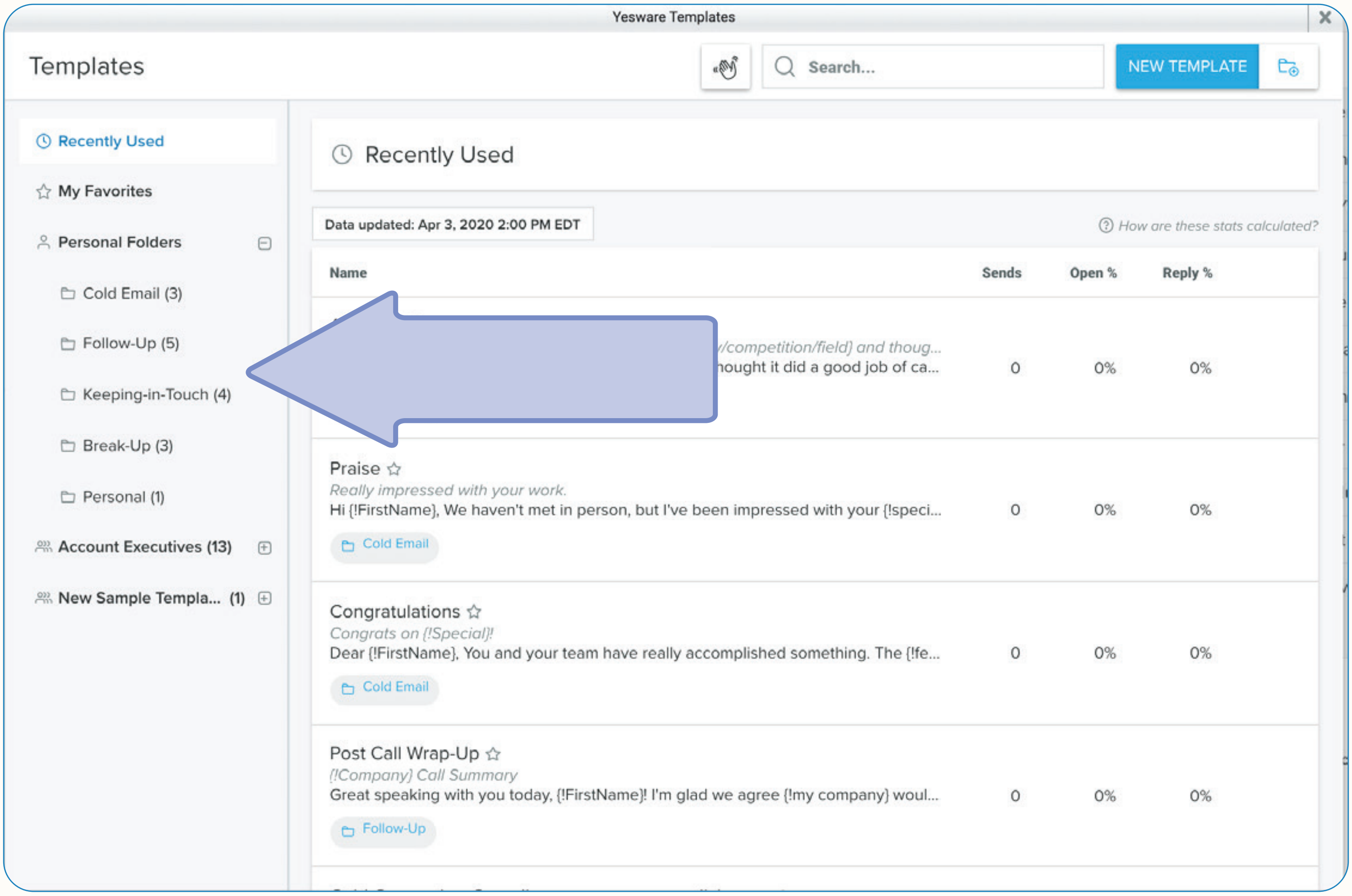
On the Team and Enterprise editions of Yesware, templates can be shared across entire teams. We've also built reporting around templates, helping you see which are your most effective.

In your inbox, your templates live in 2 places - the templates library at the top of Gmail and on the bottom right of a Gmail compose window.



Let’s head over to the Templates library.

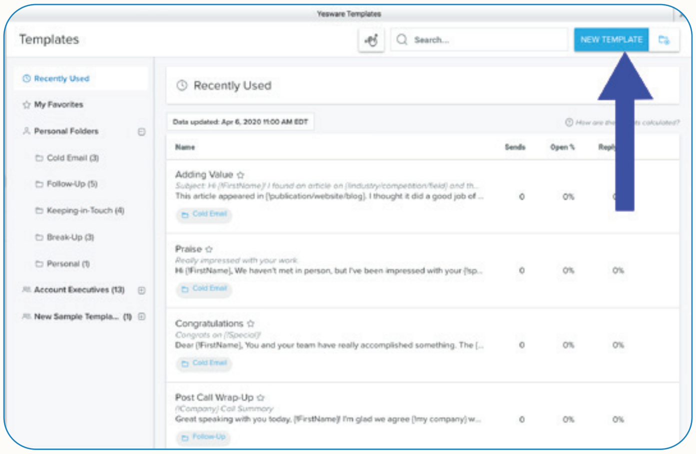
In your Templates library, the left side will have all of your personal and team templates as well as recently used and favorites.



Tip:

We highly recommend that you structure your folders for different stages of the sales process, i.e. Cold Email, Follow-Up, Keeping-in-Touch, Break-Up. This will keep you organized and save you tons of time when you’re grabbing your templates on the fly.

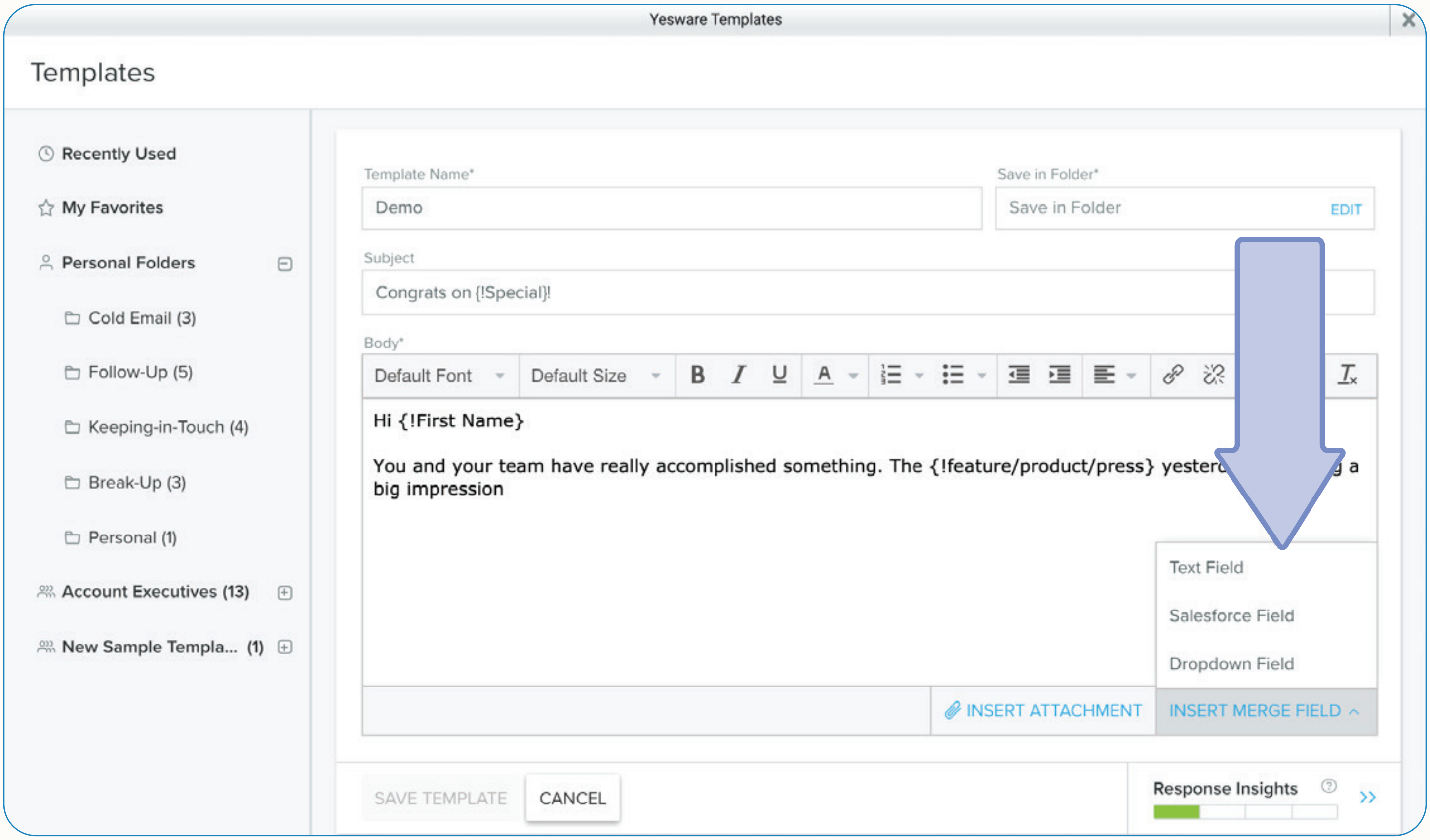
You can create your templates by clicking “New Template” at the top right of the Templates library window.



Here, you can draft up as many templates as you’d like - try them out, see results, make adjustments, and share.

When writing the body of your template, you leave room for personalization through the use of merge fields, which is found at the bottom right of your template.

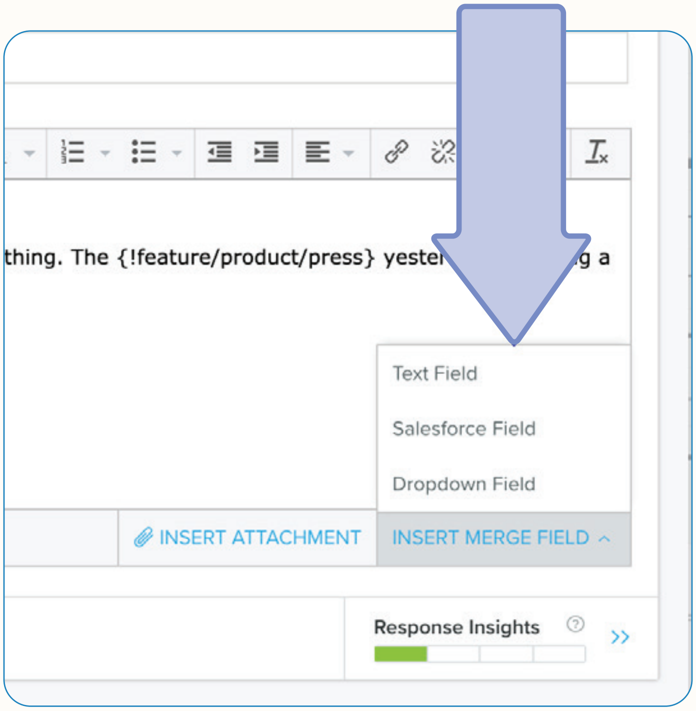
You have 3 different options for merge fields: text field, Salesforce field, dropdown field.



For those of you with a Yesware Enterprise plan, you can insert Salesforce fields and we will automatically pull the information within those fields from your Salesforce environment.

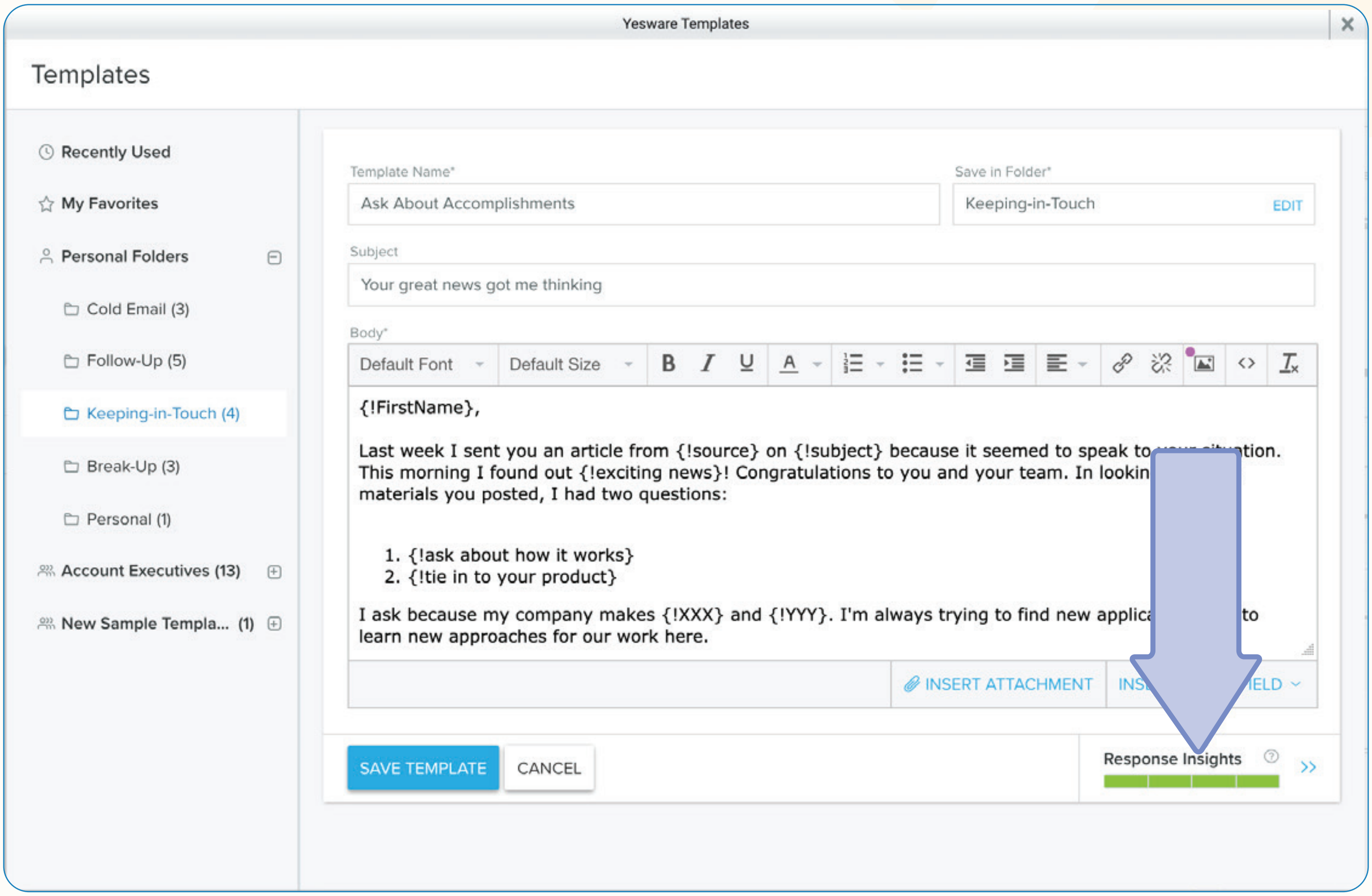
Text fields act as a placeholder or fill-in-the-blanks that you fill in manually while crafting your emails.

And dropdown fields allow you to create a predetermined list of things that you would then choose from (i.e. Monday, Tuesday, Wednesday, Thursday). When crafting an email where you're asking the recipient about scheduling a phone call, the dropdown will allow you to quickly select the day you please.

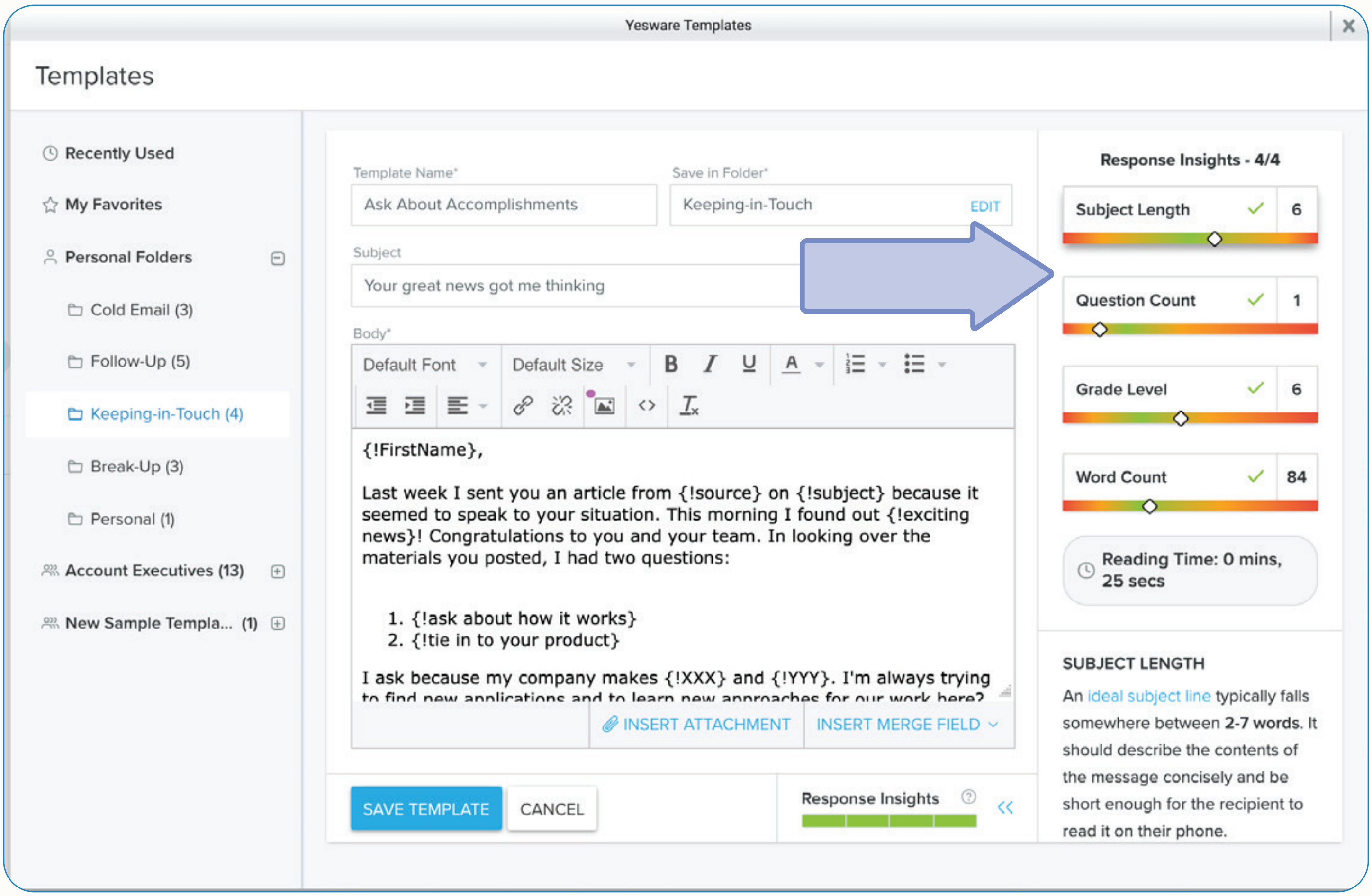


For creating your templates - we recommend trying to keep your subject line short and precise, ideally between 1-5 words. Your email length should ideally range between 50-125 words and try to stick to only asking 1 question.

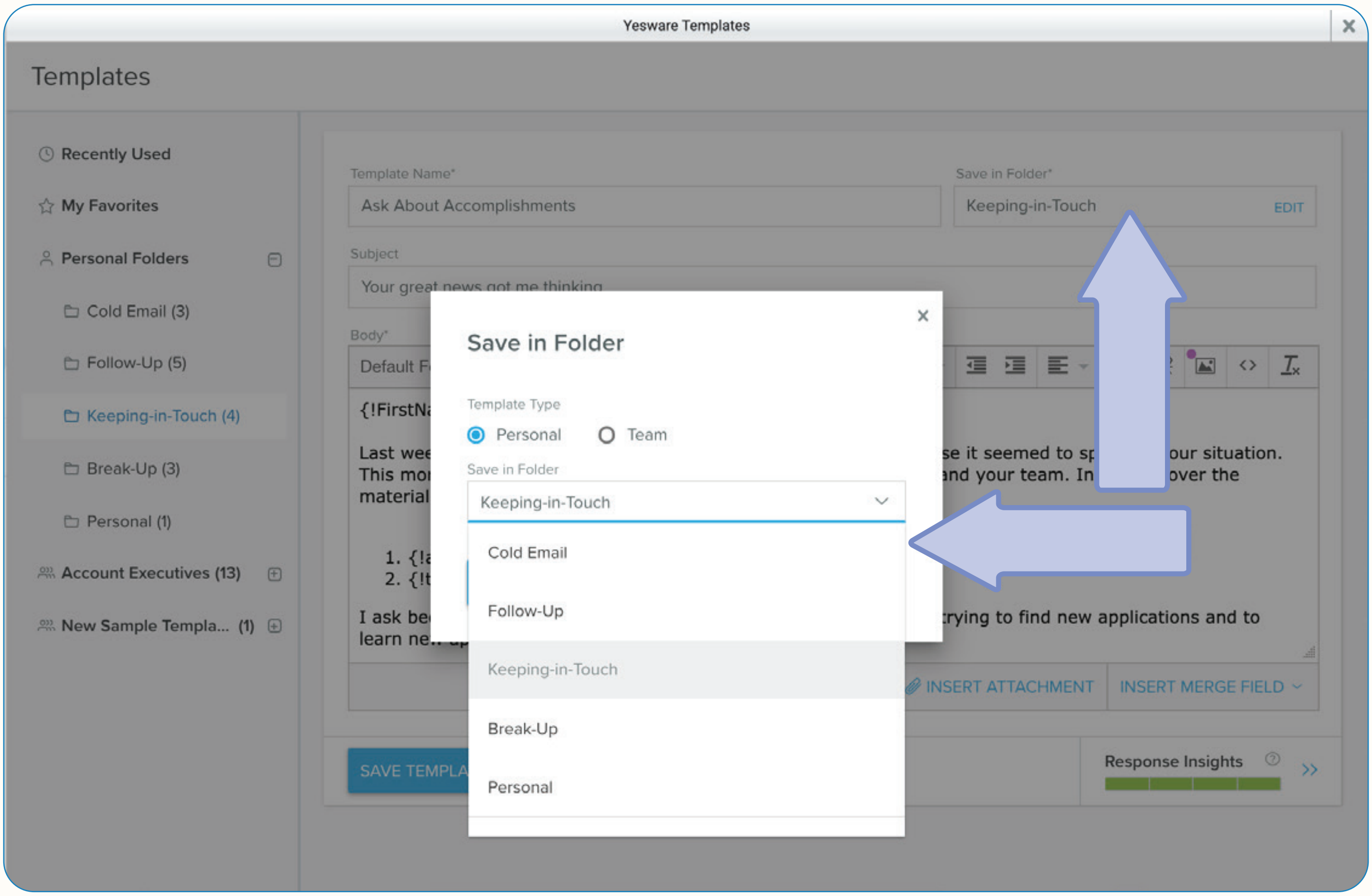
The Yesware's Response Insights feature at the bottom right of your window will also help you craft your message.



The tool will analyze your template draft and provide feedback based on extensive research we've done on what makes an email template most effective (i.e. subject length, word count, question count, and readability).



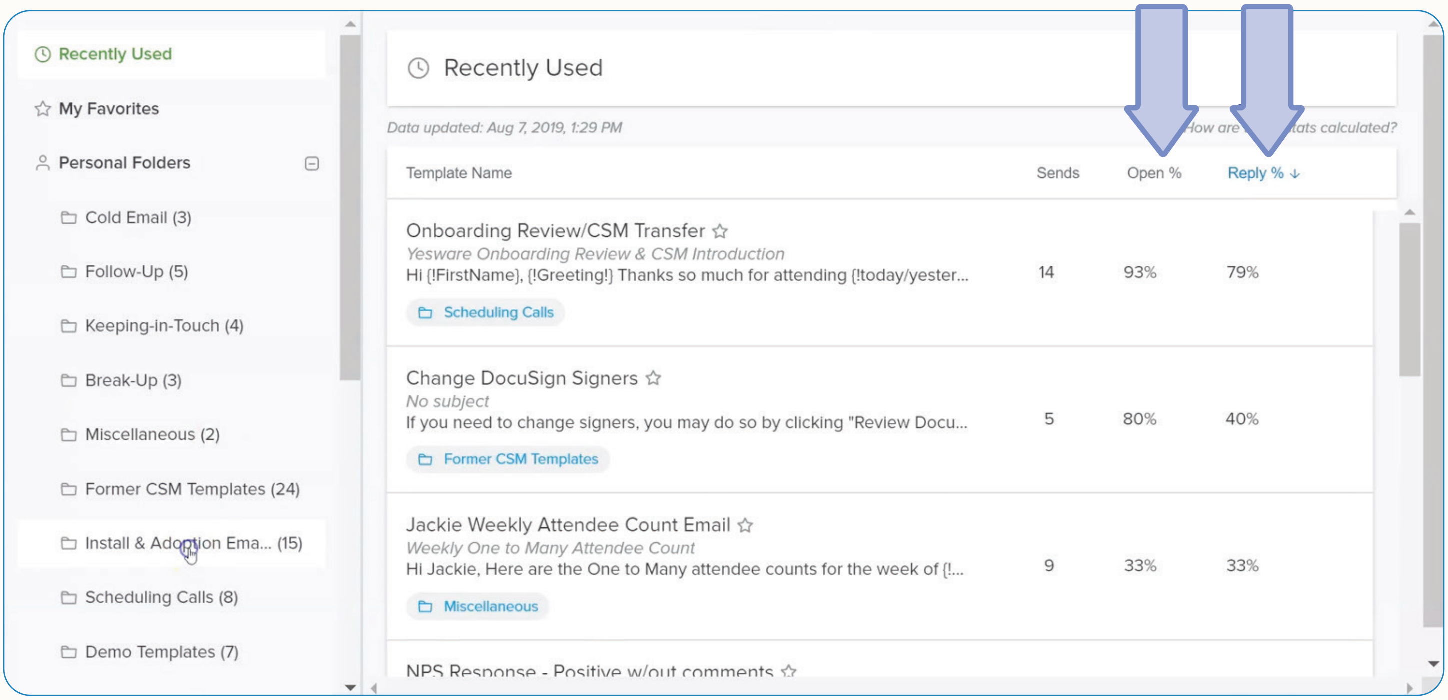
After you're done crafting your template - save it in your personal or team folder.



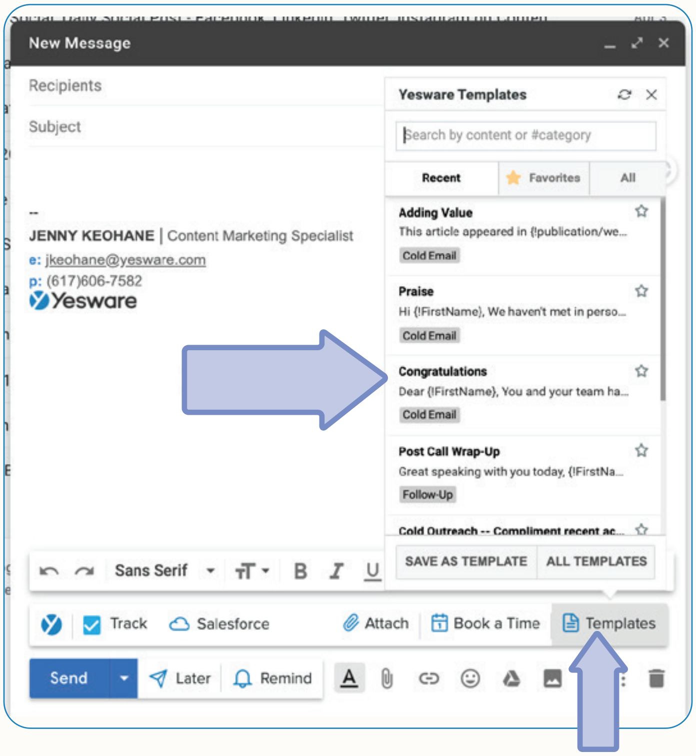
Tip:

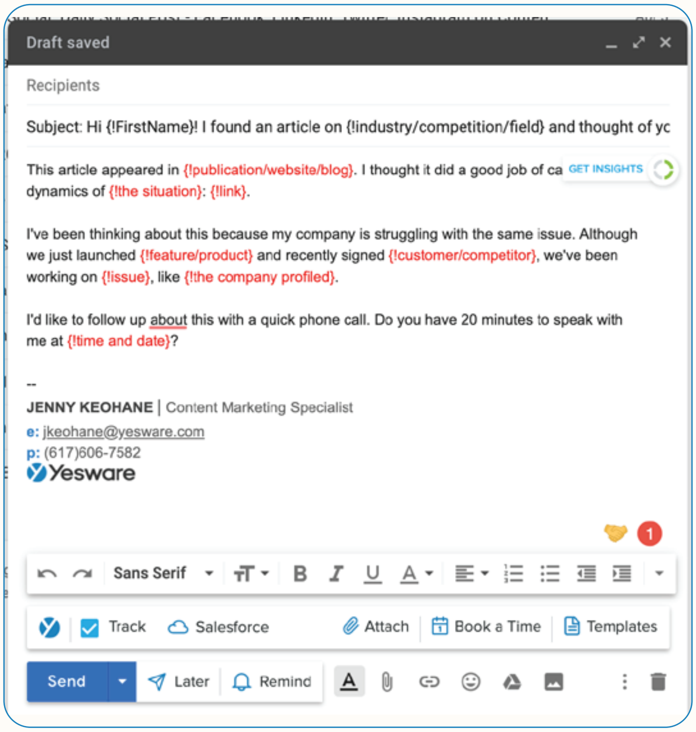
Before sending out your templates to numerous recipients - test the template on mobile - 40% of emails are opened on Mobile first so make sure everything looks okay, especially if your template includes images.

View your open and reply rates in your templates library to see what's working and what's not working. Share the templates with high open rates with your team and make improvements to templates with low open and reply rates.



Now that you're done - when composing emails, click "Templates" at the bottom right of your compose window, insert and personalize quickly and efficiently.



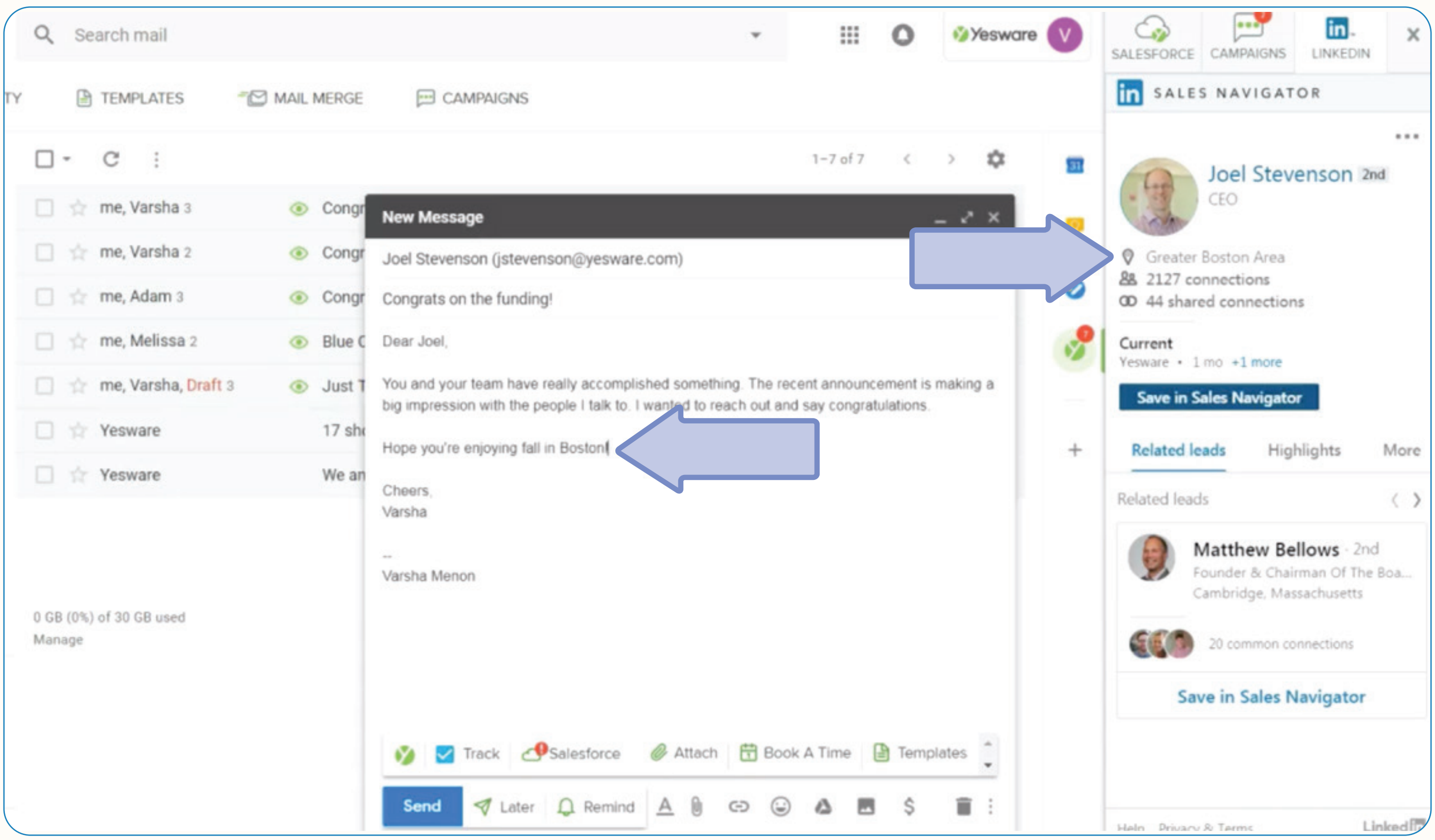


When using your templates in emails - LinkedIn Sales Navigator will come to your rescue by accessing information in the sidebar without leaving your inbox.

The LinkedIn Sales Navigator requires a Premium or Enterprise level plan from Yesware, and a ‘Sales Navigator’ Team or Enterprise Account on LinkedIn.

As you compose a new email, the LinkedIn Sales Navigator Sidebar will automatically populate a record based on the email address.

If a matching record is found, you’ll be able to see high-level profile information, and modules for Related Leads, Highlights, Recent Activity, and Get Introduced. Use this information to fill in your merge fields and help you craft authentic emails with confidence.



Tip:

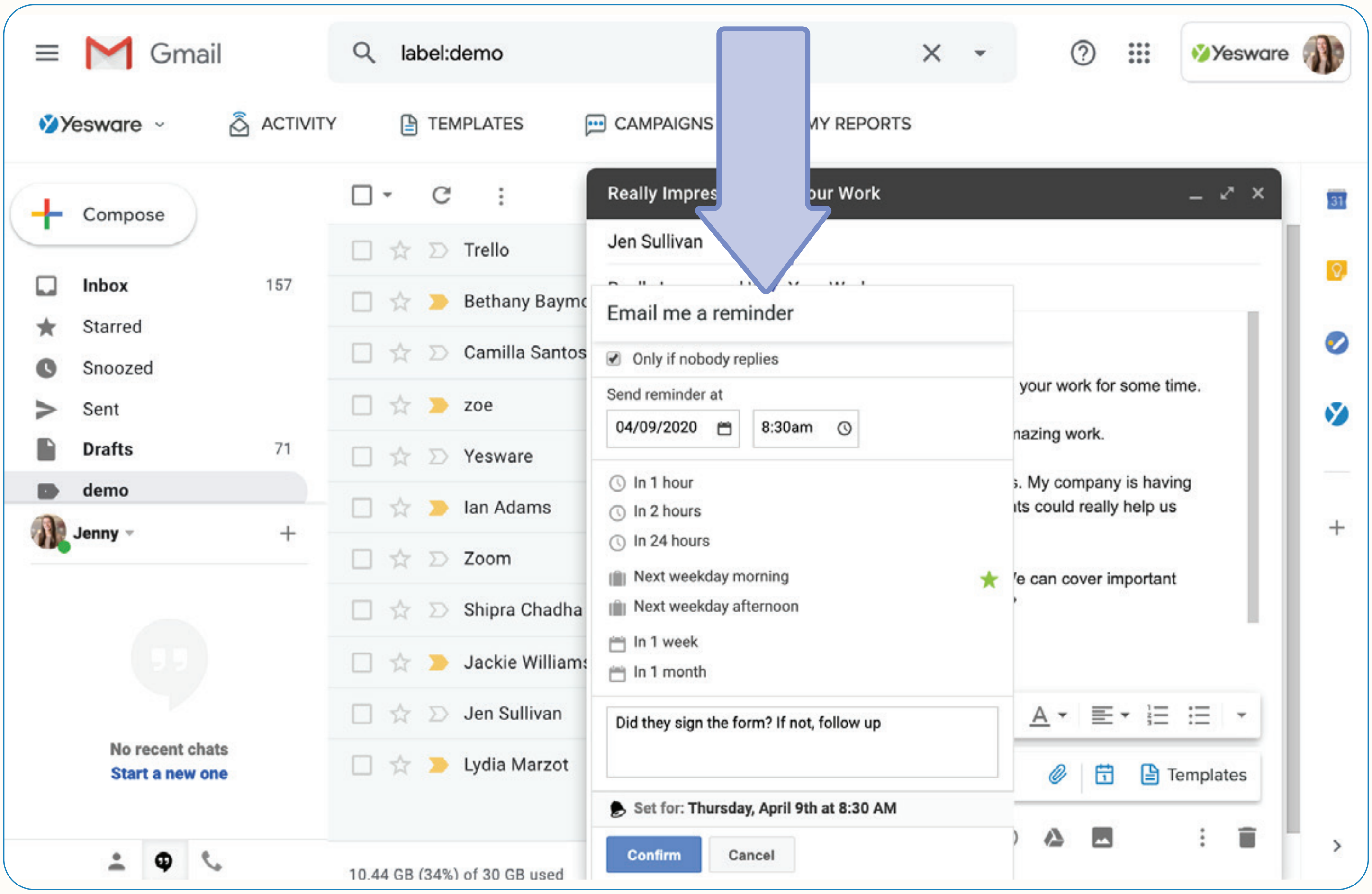
In the LinkedIn Sales Navigator sidebar, always look through their information before clicking send. Make sure you’re addressing the recipient by the name they go by in their LinkedIn, make sure they’re still in the same location, and look at their mutual connections and highlights to build meaningful connections.

Send Later and Reminders

Another set of key features that will help you manage your follow ups effectively is our Send Later and Reminder features.

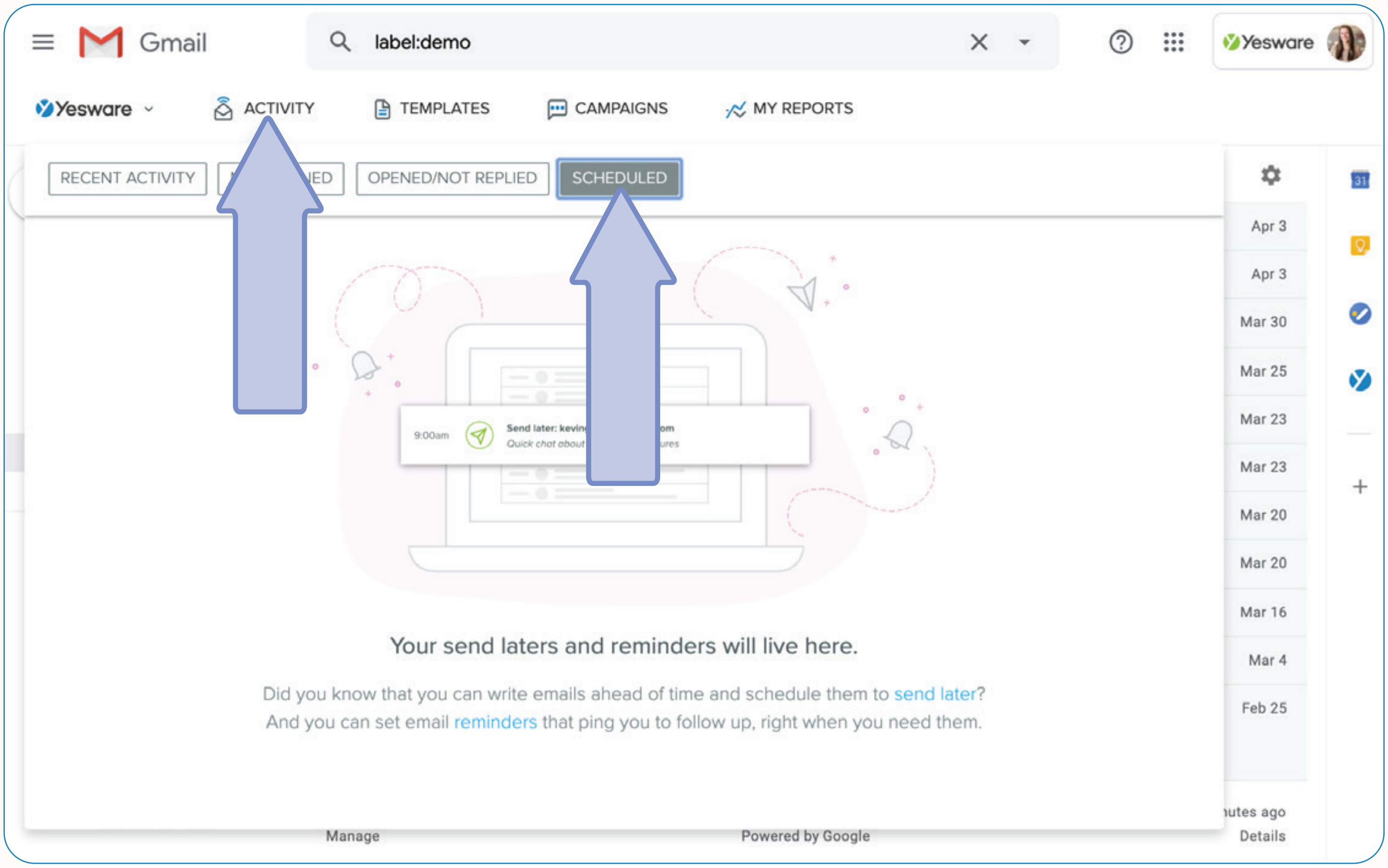
Yesware's Send Later feature allows you to schedule your email to be sent at a later time/date, so your recipient receives your message at the perfect time.

To set up an email to be sent later, open up a compose window in Gmail and write your desired message as you normally would. Instead of sending, click the "Later" button with the blue paper airplane at the bottom of the compose window and select the date that you'd like for your message to be sent.



If you'd like to cancel or edit the scheduled email, simply locate the message in your Drafts folder and edit accordingly.

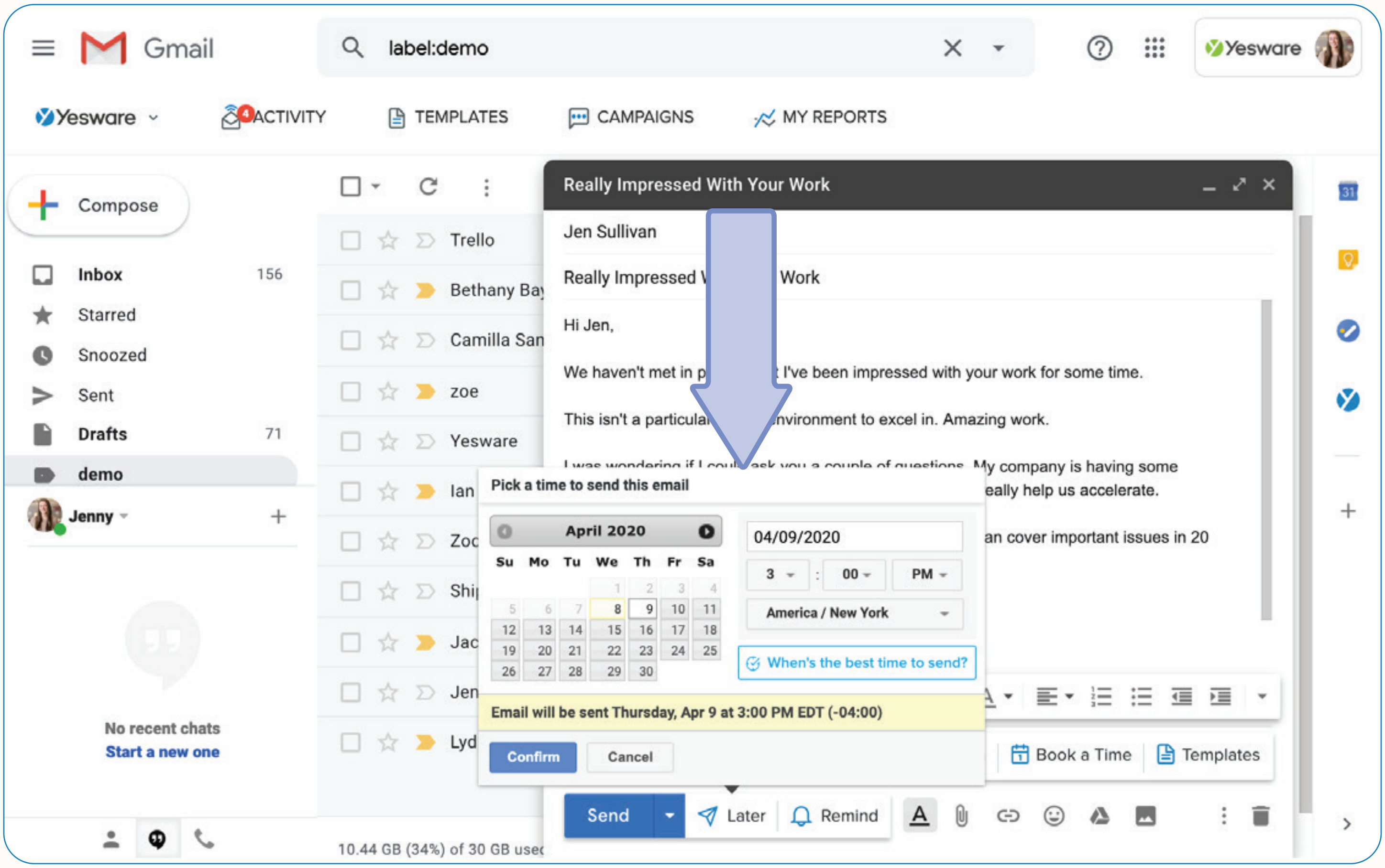
You can also view your emails that are scheduled for later in the Activity tab at the top of your inbox and select "Scheduled."



Don't want to lose an email? You can schedule a time to follow up on the emails you send and Yesware's Reminders will ping you at the top of your inbox with the original email and notes for your next follow-up.

You can set them at the time of send on the email, choosing to be reminded if a recipient doesn't reply (you can also set reminders that come back to you even if a recipient does reply) so that you can follow up, or you can set a Reminder on an incoming email or retroactively on a previously sent email.

To set a reminder on an email, click the bell icon at the bottom of the compose window, choose whether or not you want to be reminded only if no one replies or just in general. And then schedule when you want to be reminded.

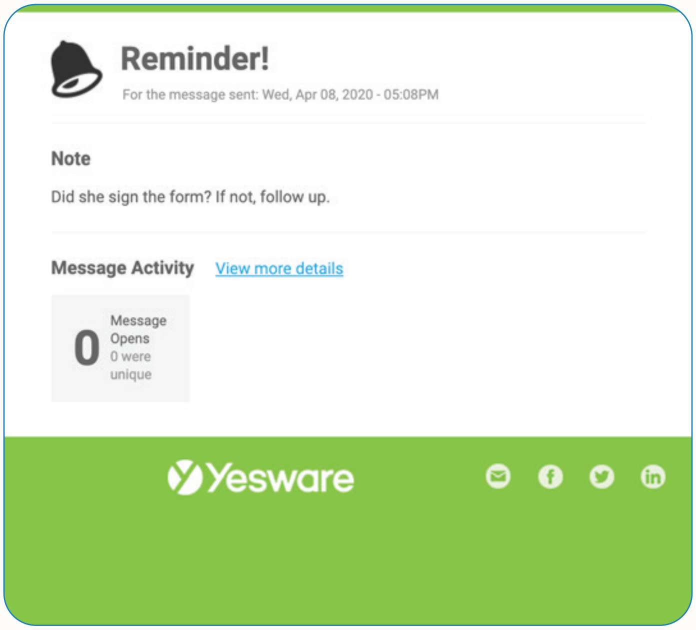


Tip:

Always write yourself a note so you don't lose track of what you need to send in the email or what you're following up on.

When that date and time occurs, you'll get an email that will have the reminder and information you need to execute the follow up.

Also, similar to Scheduled Later emails, you can view your reminders in the “Scheduled” tab under Activity.



Tip:

Turn “Conversation View” on - a specific setting within Gmail - so the reminder email will thread to the original email you sent out so you can have that for context. This is super helpful for moving quickly and getting the context you need to follow up effectively.

Syncing Activity to Salesforce

Salesforce Integration

Set your data entry to auto-pilot with Yesware's Salesforce Integration.

If you're on our Enterprise plan and already use Salesforce, it's easy to incorporate Yesware to automatically store emails from Gmail.

Unlike the basic BCC to CRM functionality, the send to Salesforce functionality will store not only sent emails, but will also capture replies, open events, viewed attachments/presentations, and link-click events into Salesforce automatically. You will also be able to use dynamic templates and Salesforce lists with Campaigns.

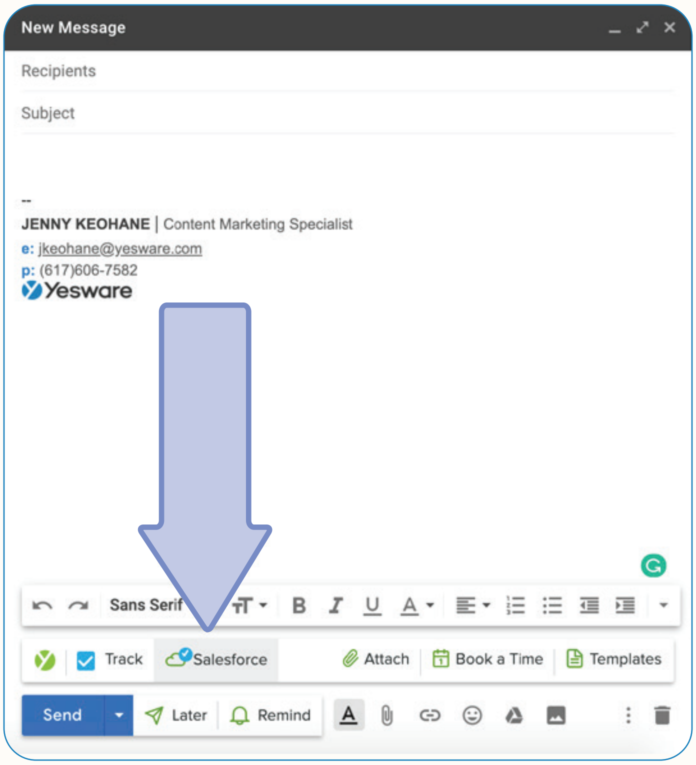
Turn on the toggle in preferences, as shown earlier in this guide under "Preferences," and link your account.

Once you do so - whenever you send an email, that message and all of its associated replies as well as any Yesware events will be stored to Salesforce as activities on an existing Contact or Lead. The email will sync as an activity to the first single Contact or Lead and optionally the first single Account or Opportunity associated with the email address.

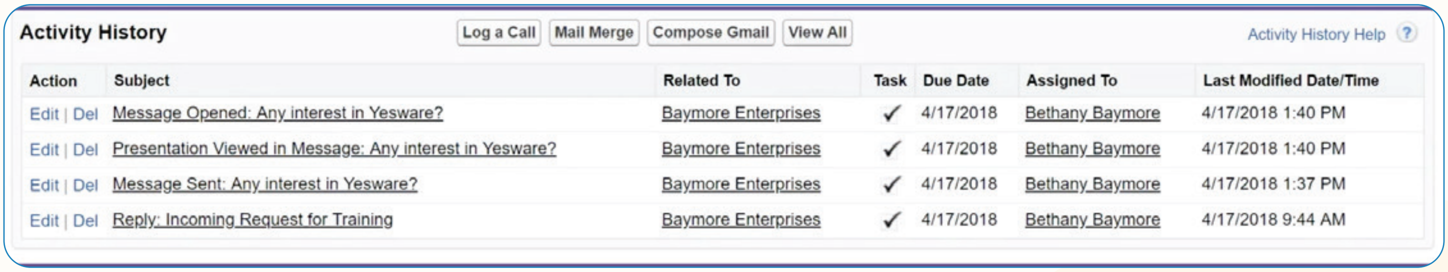
Any time you're emailing a recipient that email address matches the email address of a contact or lead in your Salesforce environment - this email (subject line, context of email) and the subsequent engagement (reply, message opens, link clicks, etc.) are going to automatically sync to Salesforce.

You can confirm that your email is going to sync with Salesforce with the checkmark on the Salesforce button at the bottom of your compose window.

When you click on the button you can confirm exactly where this information is going.



When it appears in Salesforce, it's going to show up on the contact or lead record under "Activity History" - here you can see the message sent, replies, opens, presentation views, link clicks.



Activity History Log a Call | Mail Merge | Compose Gmail | View All — Activity History Help ?

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Message Opened: Any interest in Yesware?	Baymore Enterprises	✓	4/17/2018	Bethany Baymore	4/17/2018 1:40 PM
Edit | Del	Presentation Viewed in Message: Any interest in Yesware?	Baymore Enterprises	✓	4/17/2018	Bethany Baymore	4/17/2018 1:40 PM
Edit | Del	Message Sent: Any interest in Yesware?	Baymore Enterprises	✓	4/17/2018	Bethany Baymore	4/17/2018 1:37 PM
Edit | Del	Reply: Incoming Request for Training	Baymore Enterprises	✓	4/17/2018	Bethany Baymore	4/17/2018 9:44 AM

If the recipient is a contact, it will also show up on the Account level in the Activity History.

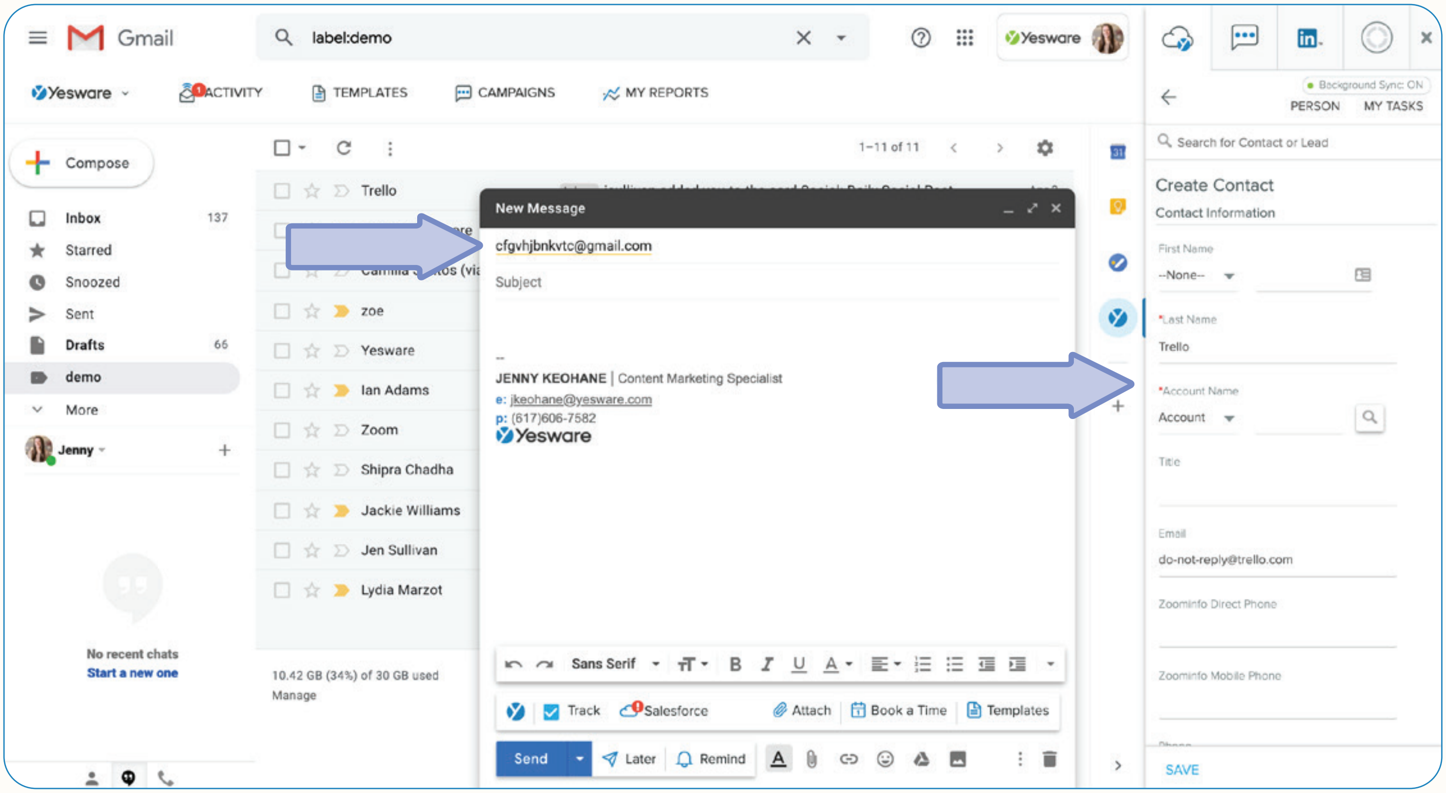
If that contact is assigned as a "contact role" on an open opportunity - it will also show up on the opportunity level. It will sync to all 3 - opportunity, account, and contact.

And leads will sync to the lead level because leads don't associate with any of those other objects.

Sidebar

When you're emailing a recipient who exists in your Salesforce environment, the sidebar will pull up their contact or lead record. You can see custom fields, activity history for context, and more. If you're reaching out to someone for the first time or someone who isn't in your Salesforce environment but should be - the sidebar will prompt you to create a contact or lead.

The sidebar is based off of your Salesforce environment so any of your required fields in Salesforce will show up in the sidebar.

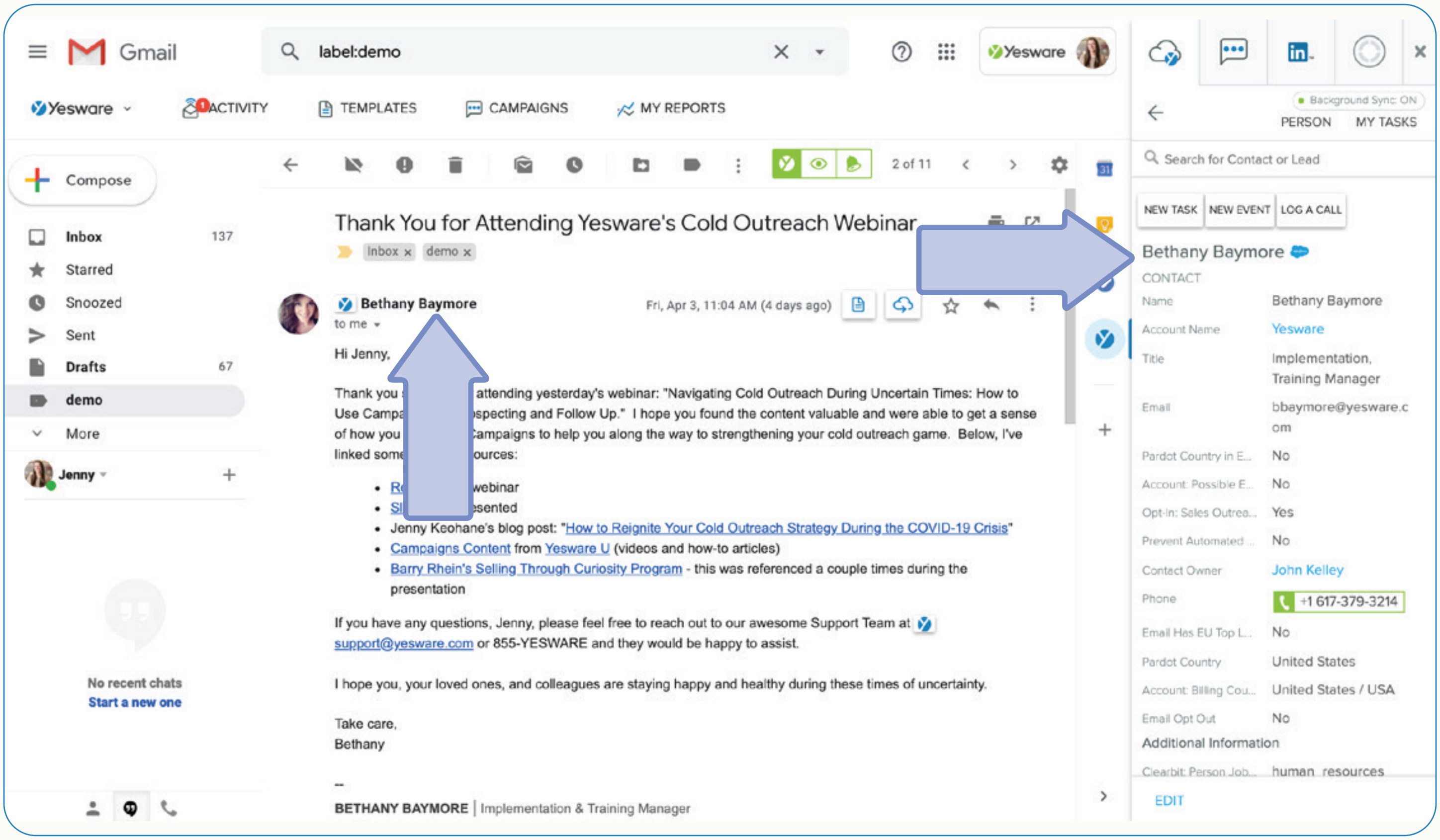


Once you save this and send off your email - this will all sync to Salesforce correctly.

The sidebar will appear on emails you click on - when you click on an email from a contact or lead, all information will come up in the sidebar. And when you click on an email from someone who isn't in your Salesforce environment - the sidebar will prompt you to create a contact or lead.

Tip:

Let's say you get an email from an existing contact or lead informing you that their number has changed - the sidebar is right there to make the changes. Always make sure your information is up to date and use the sidebar to make all changes without leaving your inbox.



From this sidebar you can also review all information in your Salesforce environment. You can search for people, view activity history, opportunities, create new tasks and events, log calls, create new opportunities, etc. - anything you have access to in Salesforce, you should have access to in the sidebar.

This allows you to stay in your inbox and keep you where you spend your most time.

Learn more about Yesware's Salesforce Integration capabilities in our learning portal - **Yesware U**.

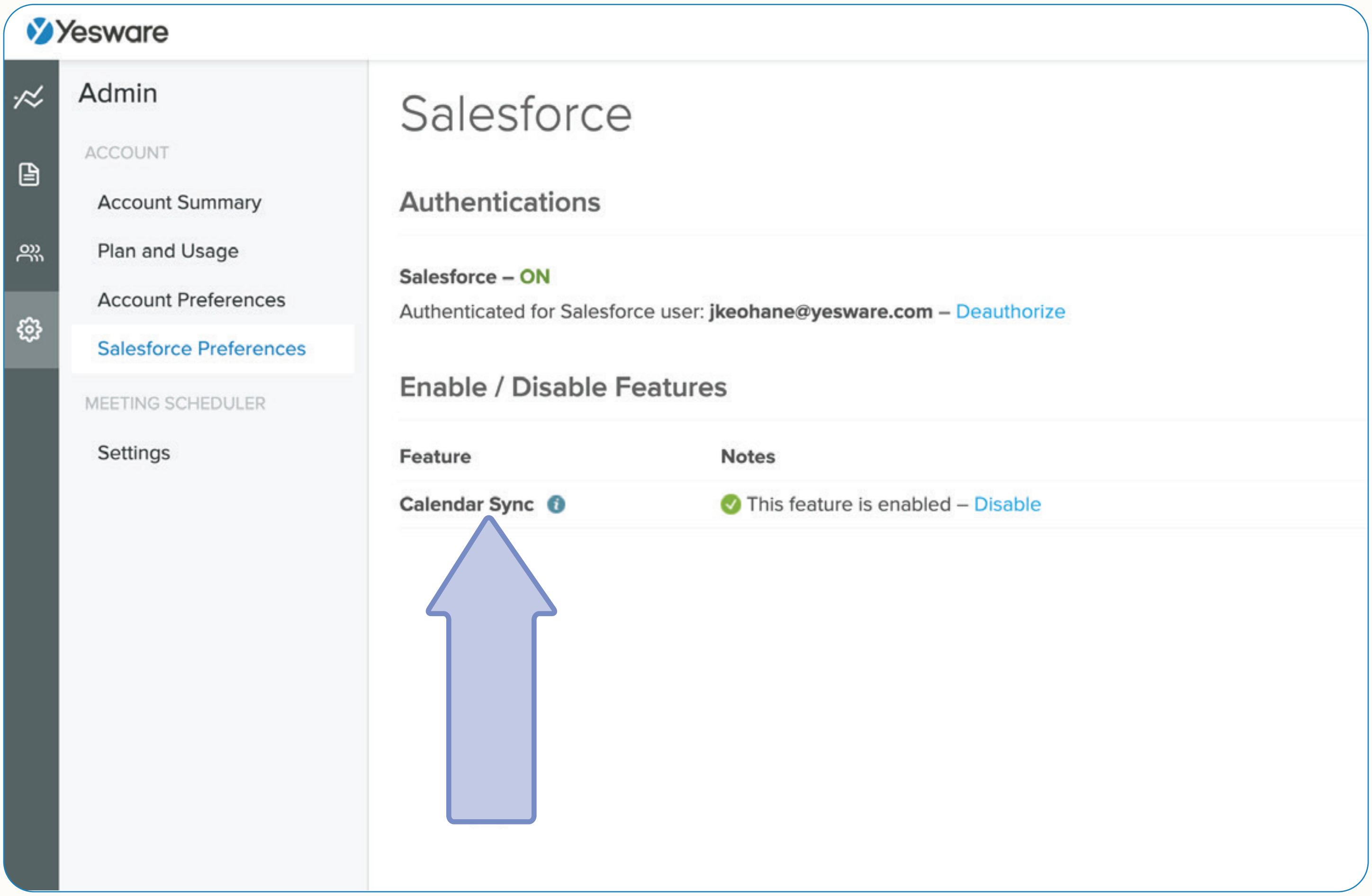
Calendar Sync

When you're booking emails left and right, the last thing you want to do is worry about manually logging them to Salesforce. If you have a Yesware Enterprise Plan - Calendar Sync can take care of this for you.

Yesware's Calendar Sync eliminates the need for manual data entry and increases collaboration for appointment setting by allowing you to sync your Google Calendar events directly to Salesforce and associate them with a contact or lead.

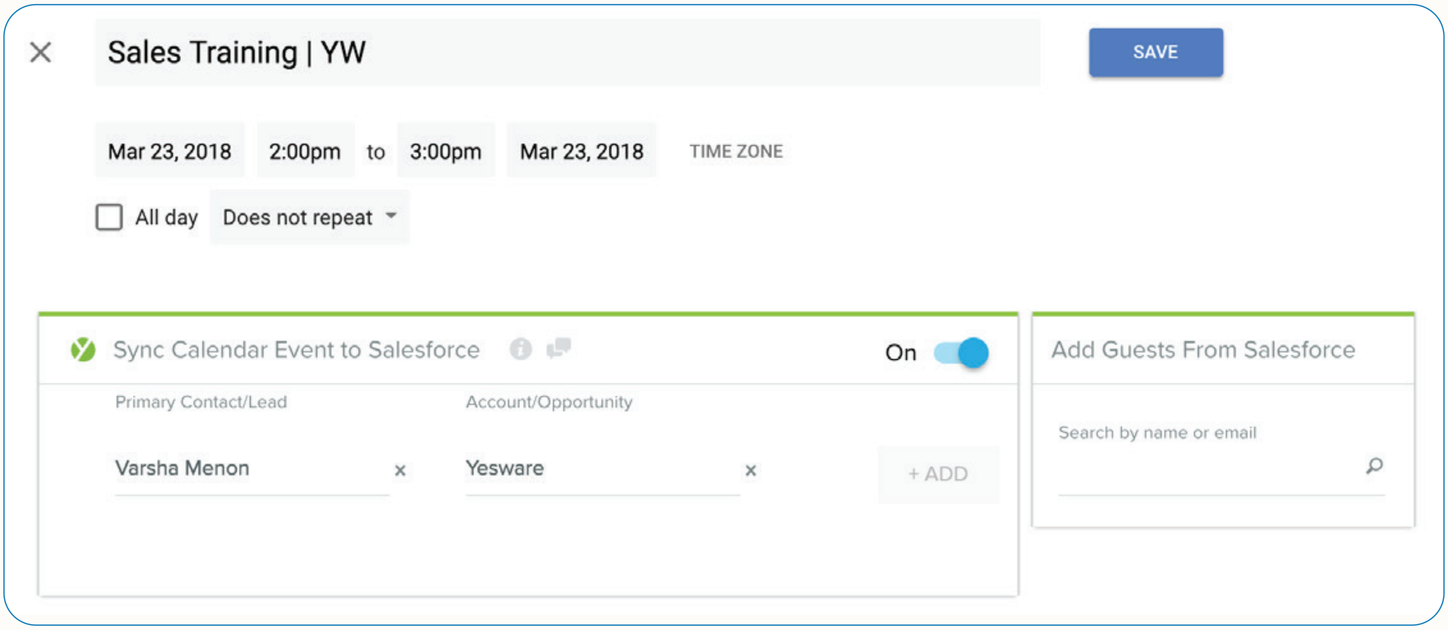
If your goals are based around the number of meetings you're booking, this is a great way to make sure that you're getting them into Salesforce so you don't have to worry about manually entering each meeting in.

You can enable Yesware's calendar sync by visiting your Salesforce configuration page in **your Yesware account**. To set this up, simply enable Yesware Calendar Sync.



Once it's set-up, Yesware will automatically sync the meeting with the contact or lead in Salesforce associated with the first email address added as a guest to the calendar invite. You can also manually select a contact, lead, account, or opportunity.

If a matching record is found, you'll be able to see high-level profile information, and modules for Related Leads, Highlights, Recent Activity, and Get Introduced. Use this information to fill in your merge fields and help you craft authentic emails with confidence.



The meeting can be found in the "Open Events" for the corresponding record in Salesforce until the date/time of the meeting has come and gone, and then it will show up in the "Activity History."

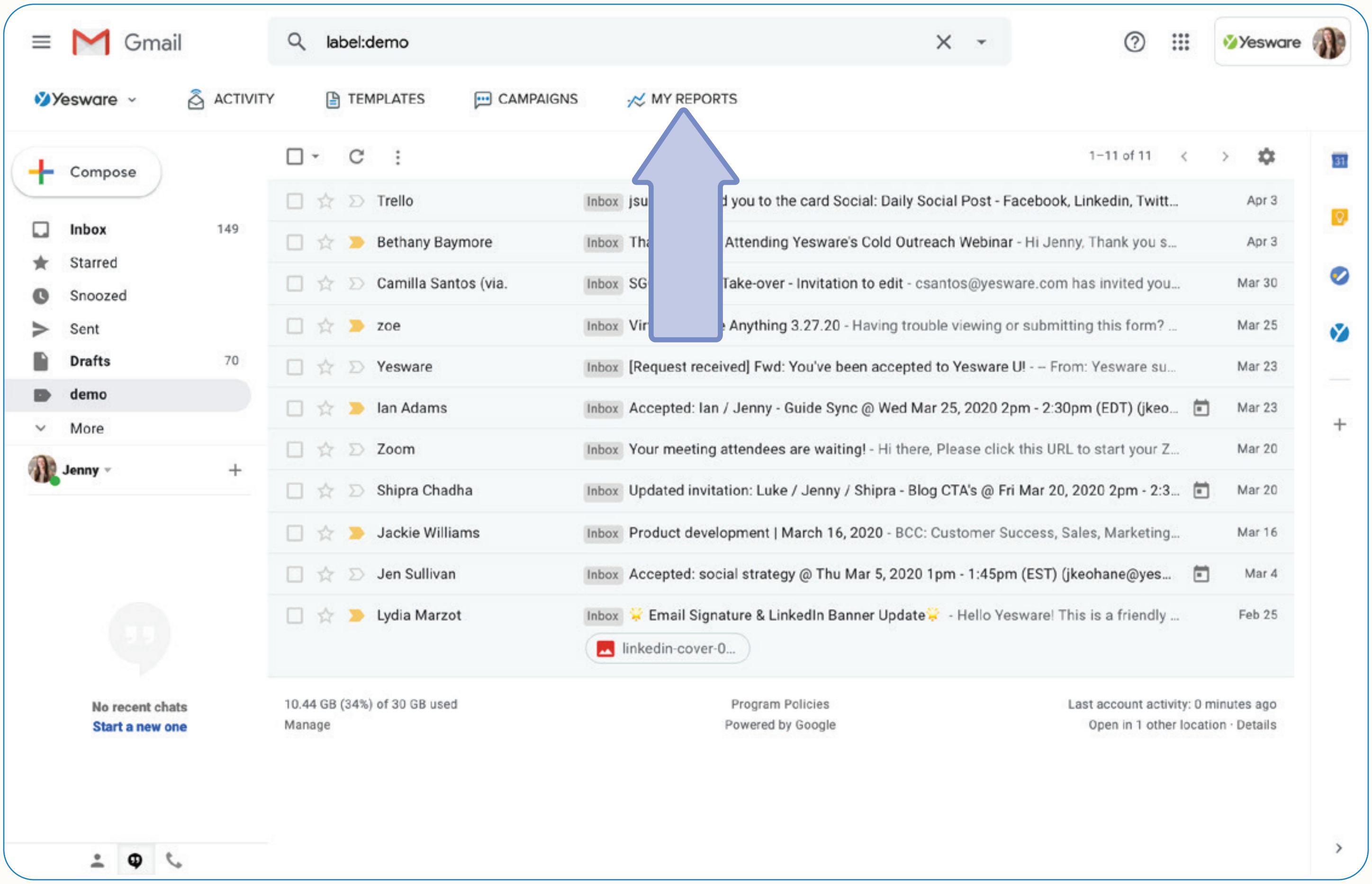
In addition, any events that you create in Salesforce will automatically be added to your Google Calendar. This means less manual data entry, better teamwork for appointment setting, and even mobile support for saving events from the road.

Review What's Working

Reporting

Understanding what's effective isn't always easy. Closed deals and tangible results are good for measuring success, but they don't answer the question of how you got there. Having clear insight into the sales process as well as individual and team performance speeds up and fine-tunes your selling. That's why we've built a suite of reports to give our users the insight you need to thrive.

You can find "My Reports" at the top of your inbox.



Yesware gives you all the reporting you need: Email Activity Report, Templates Report (by User and by Template), Recipient Engagement Report, Link Click Engagement Report, Personal Tracking Report, Reports Downloads, Campaigns Dashboard, Salesforce Reporting and Dashboard.

Here are a few of them:

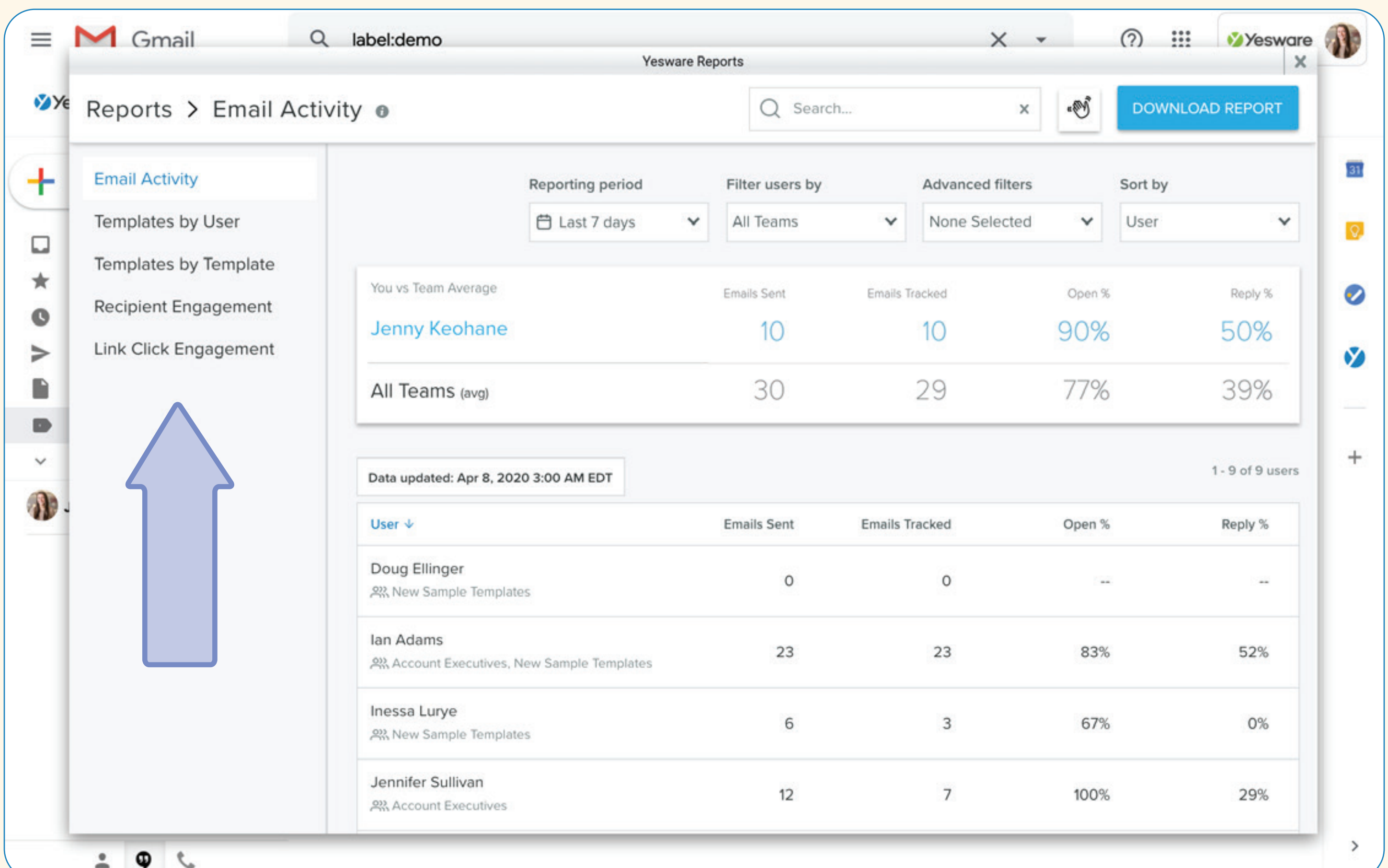
1. Email Activity Report

The report covers all email activity sent by you and your team(s), broken down by user. You can view emails sent, emails tracked, open %, and reply %.

All team members are able to view team performance stats to learn from one another and improve together. Not only does it give team leaders an easy-to-read view of team tracking performance, but it also allows all team members to view the email activity of the other members of their team(s).

Tip:

All information in the report can be sorted by reporting period, team, and performance-metric for a customized experience.



2. Templates by User Report

This report provides a quick overview of the usage and performance for personal and team templates.

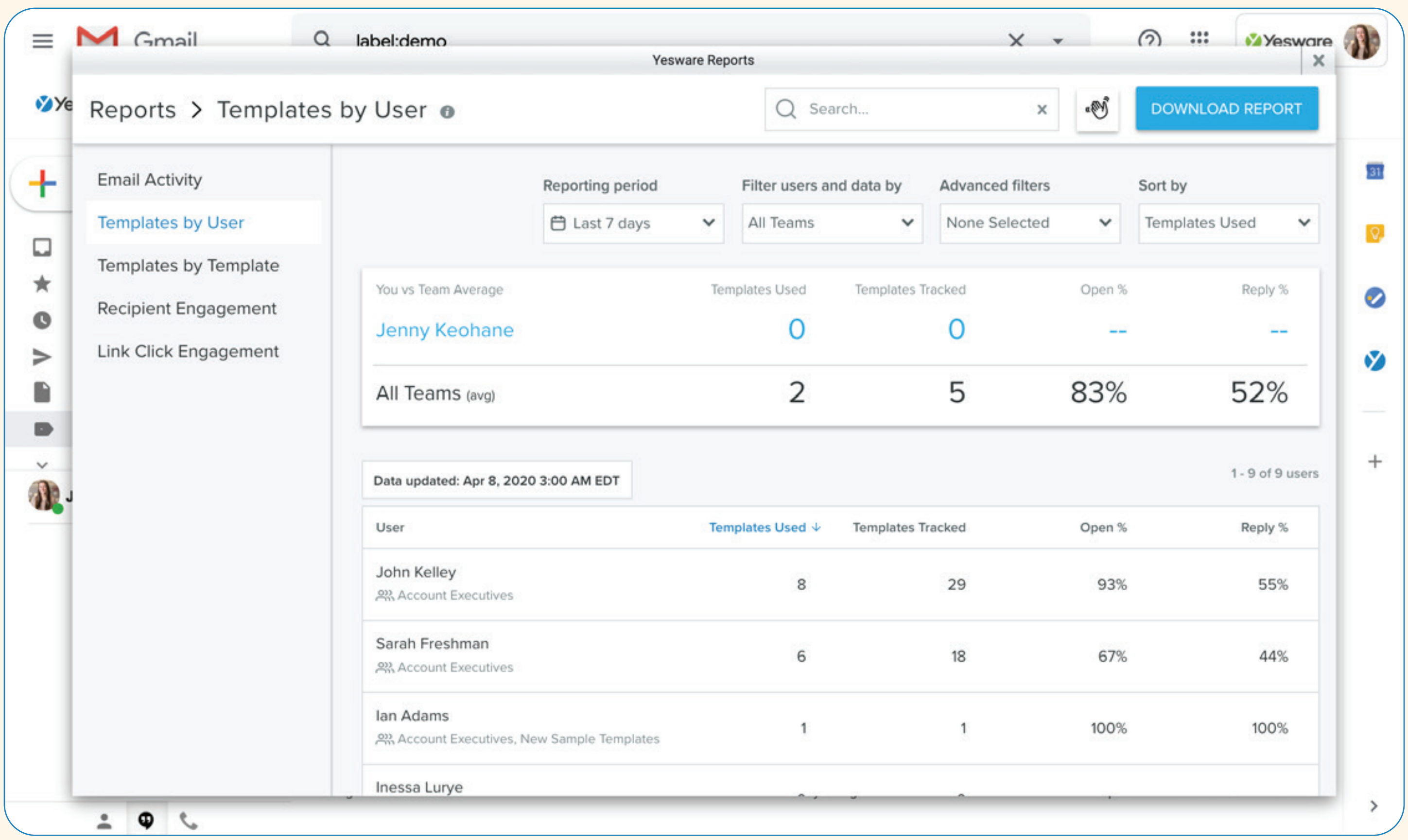
Sales is a team sport, and where one salesperson succeeds - everyone succeeds.

The report breaks down template usage by individual users, so sales leaders can guide their team strategy and individual team members can see how their colleagues work - and how their own performance stacks up.

At the top of the Templates report, you'll have a summary overview of your own Template performance stats, as well as those of your team(s). By seeing these numbers at the top of your report, you'll have immediate visibility into how you're performing compared to your team(s).

Tip:

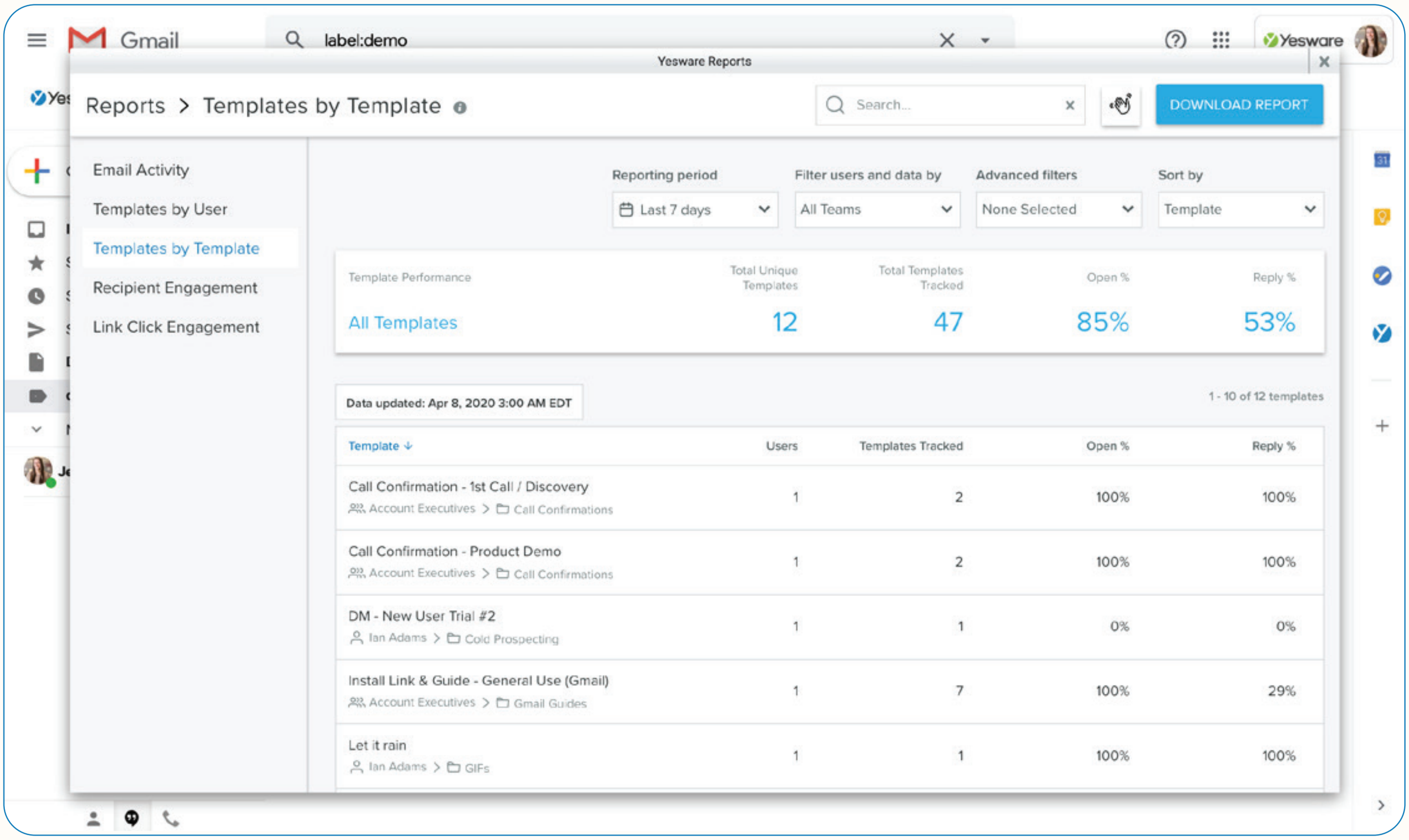
Sales managers - by adjusting the reporting period, team filter, and sort by options, you'll be able to organize the report in a way that makes sense to you and see what's working and what's not within your team. You can also view individual usage of Templates so you can identify users who aren't taking advantage of Templates and get them up to speed.



3. Templates by Template Report

This report provides an overview of the usage and performance of specific, individual personal, and team templates.

The report breaks down template usage by each template, so sales leaders can determine which templates are performing well and which could use a little work, and individual team members can see which templates their colleagues are using successfully and follow suit.



Lastly, The Recipient Engagement Report and Link Click Engagement Report outlines how engaged your recipients are and how much they've interacted with your emails to help you determine where to spend your valuable time. You no longer have to rely on individual email tracking to try and build the bigger picture for each individual recipient.

Tip:

You can download your reports as CSVs by clicking the "Download Report" button in the upper right hand corner of the screen. This helps you manage your reports, organize and save reports to your desktop, share reports in emails or presentations, and document team progress.

Managed Package in Salesforce

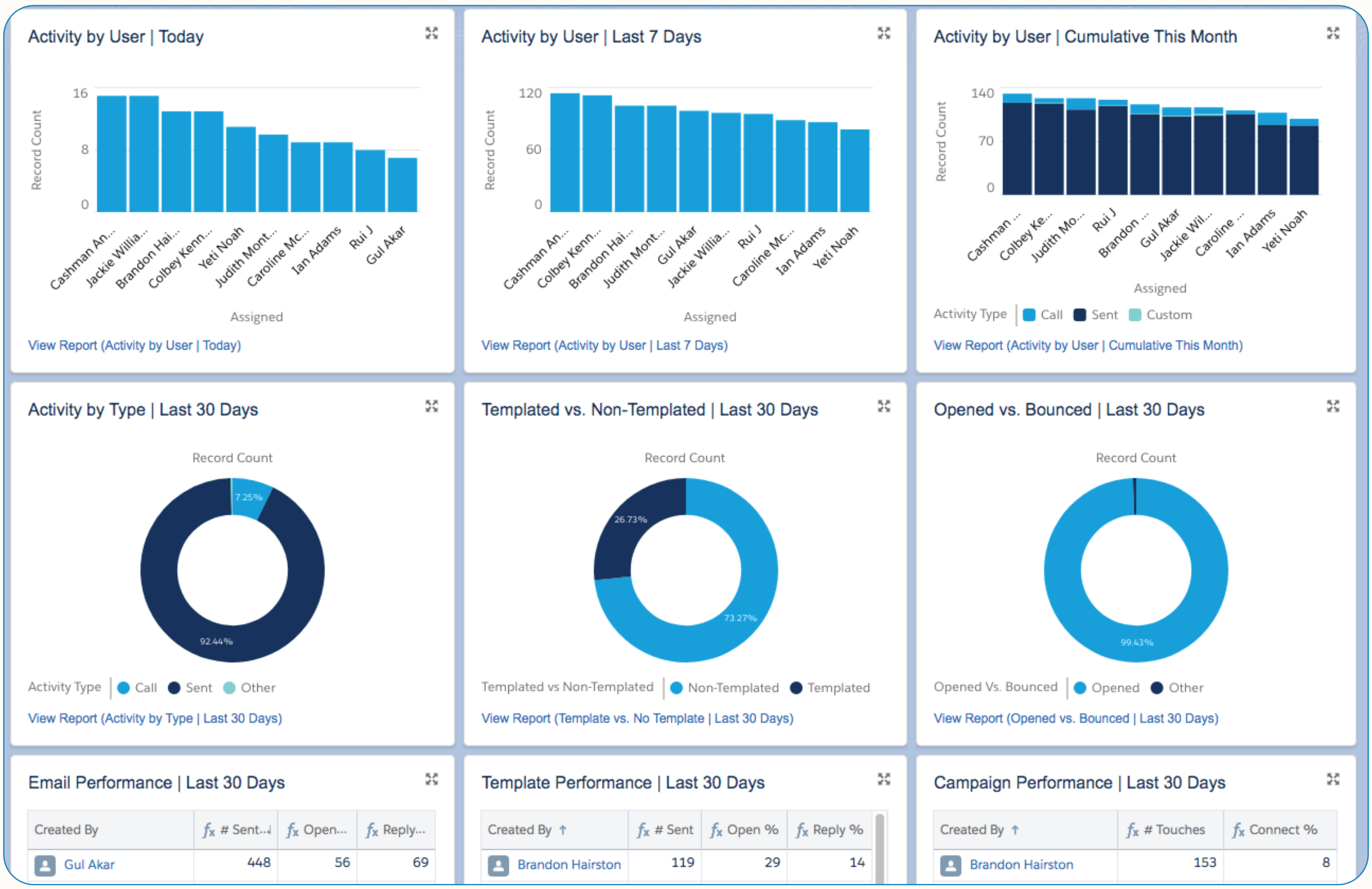
We designed these dashboards to work for you immediately upon installation without any configuration required. You will gain access to 4 dashboards with a total of 40 reports.

The Managed Package includes:

Activity Dashboard includes 12 reports
Templates Dashboard includes 12 reports
Campaigns Dashboard includes 6 reports
Meetings & Opportunities Dashboard includes 6 reports

Our Managed Package visualizes email, call, and calendar activity across your sales team. See how their activity leads to outcomes like meetings booked and closed-won revenue when you install this app.

Here is what the Managed Package in Salesforce looks like:



To download click here!

click “Get It Now” to install **4 free reporting dashboards** by Yesware.

Share Best Practices with Your Team

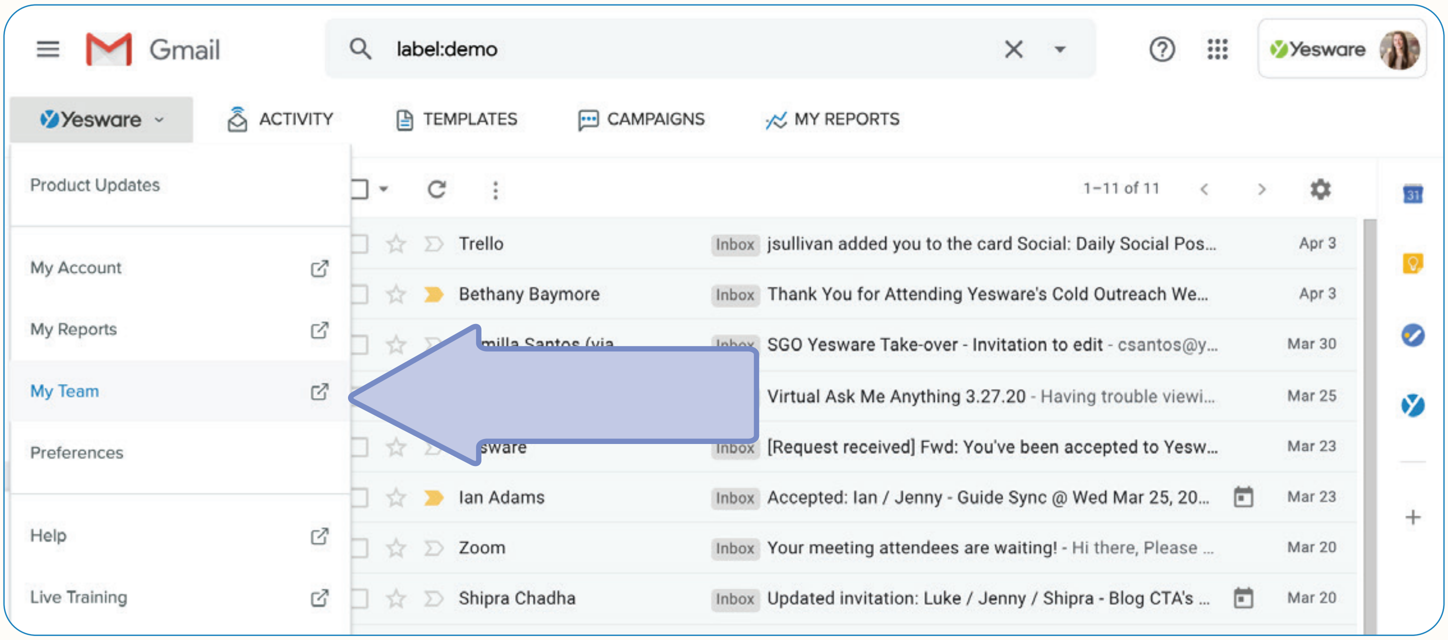
Teams

Selling is a team sport. Yesware allows you the ability to share templates, campaigns, and all important information to your teams.

With every email sent, every open, and every interaction tracked, you'll always know what's working – in real time – across your whole team. Knowing what's working is one thing. Sharing what works is what makes your whole team better.

Yesware users on Premium and Enterprise plans can create teams. You can create and manage your team through your Yesware account.

Using the Yesware drop-down menu in the top left corner of Gmail, select "My Teams," here you can add teams, name your teams, and view your reports.



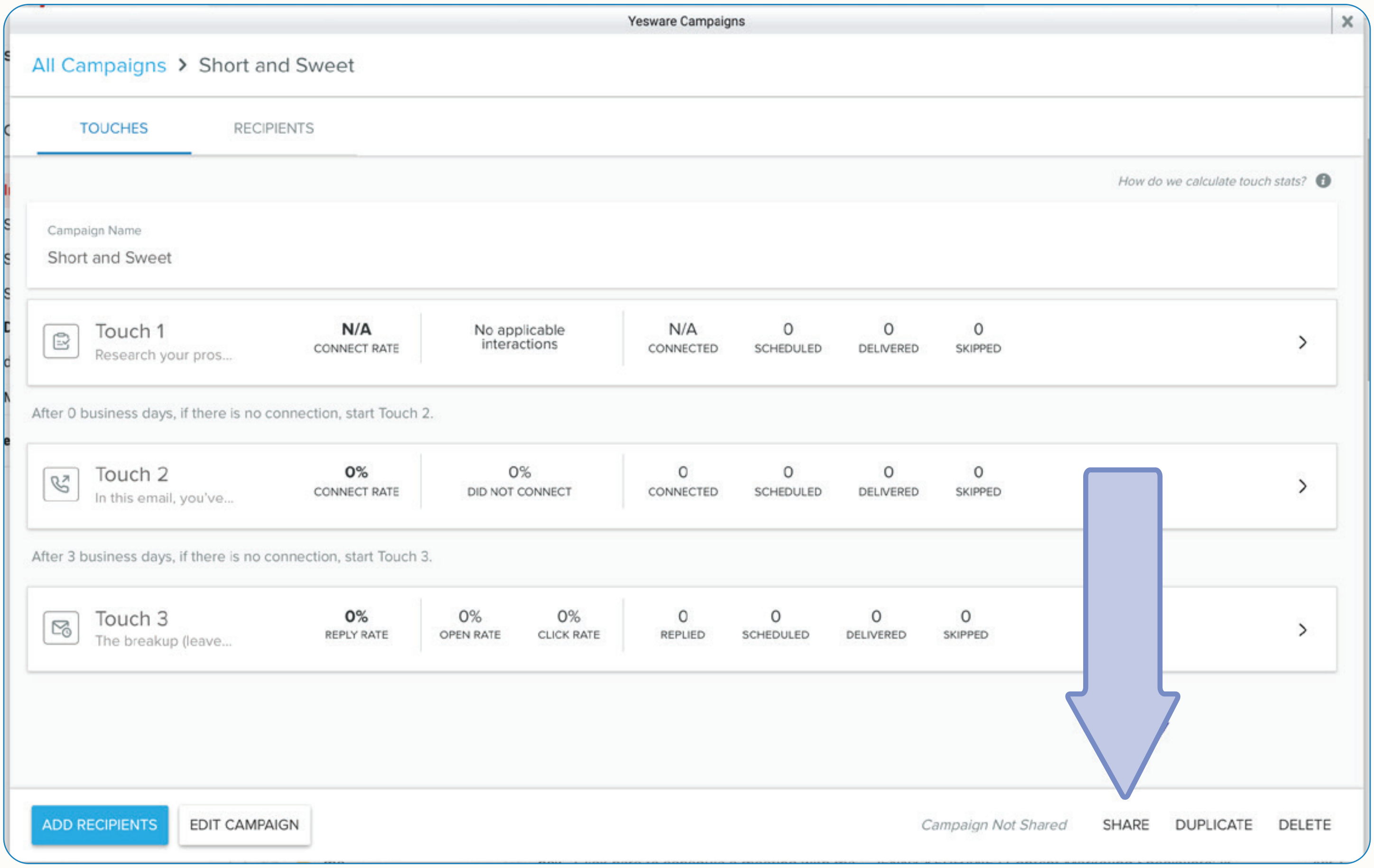
Create teams, add users, and share templates and campaigns.

You can share both templates and campaigns with your teams. See which are performing the best based on open and reply rates and utilize those. Make adjustments, share your findings, and work together to craft the most effective content.

Share Campaigns and Templates

You can share a Campaign by clicking on the Campaign you'd like to share and then select "Share" in the bottom right.

From there, you'll be able to select which team(s) you want to share your campaign with from the team picker.



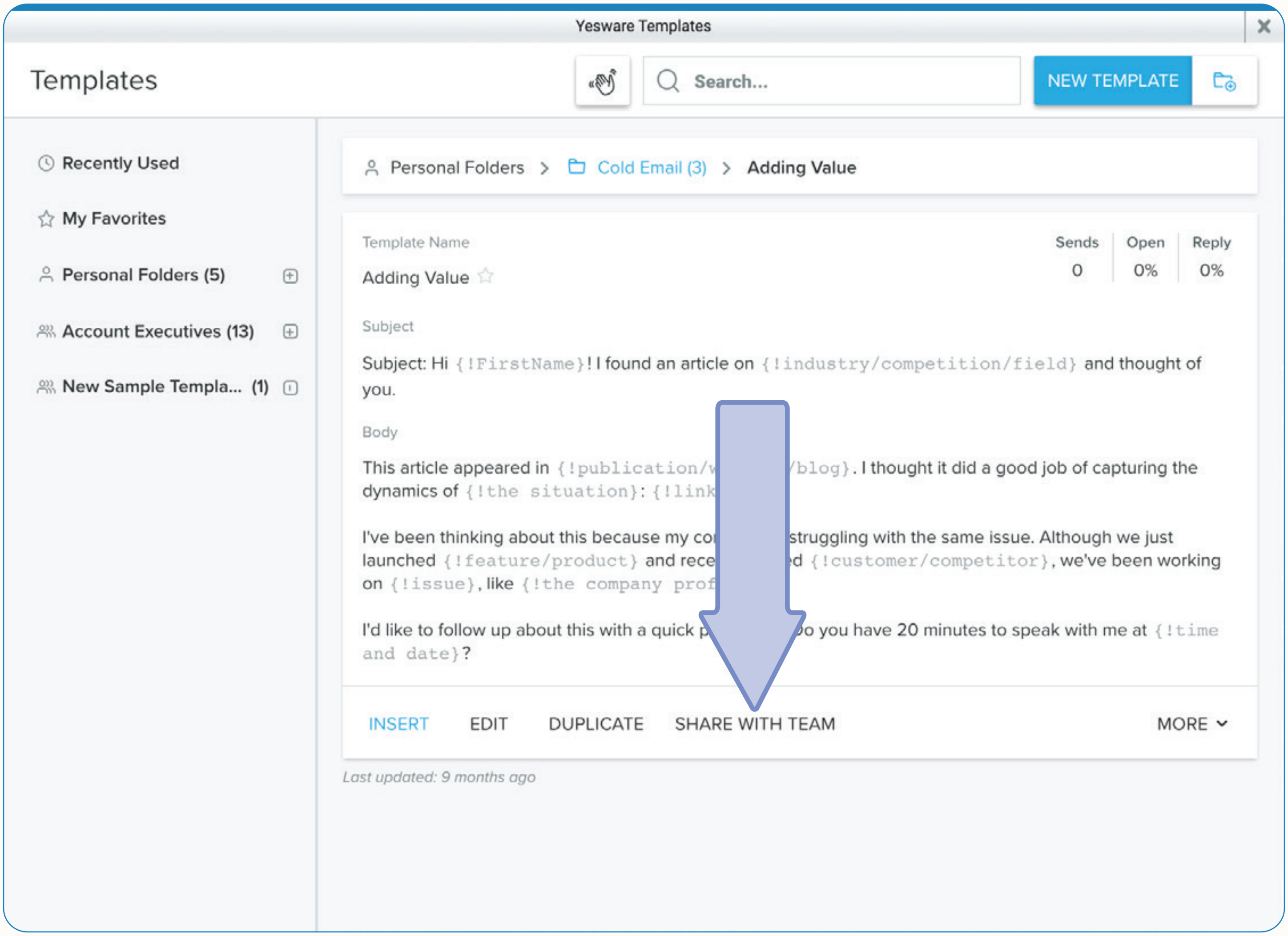
Tip:

Make sure tracking and sync are turned on to guarantee data capture across the team.

Keep in mind that when you share a Campaign, your team members are able to use the content of your Campaign but will not be able to access or manage your recipients.

Also, any Campaigns submitted by team leaders and team members will be added to the Campaigns dashboard for use by all team members immediately.

Next, you can share templates by clicking "Share with team" at the bottom of your templates, you can move templates around folders and into your team folder, or when creating a new template, when you go to save in a folder, click "Team."



Tip:

Keep both personal and team libraries organized by folders and categories. Rearrange templates so they best align with your workflow.

Conclusion

By utilizing Yesware's features and functionalities, you can move through the stages of your sales process faster and ultimately work smarter - not harder.

We hope to empower sales professionals to try new strategies and share best practices with their team.

If you want to learn more about Yesware's ecosystem, visit our learning portal - **Yesware U** - where we've pooled together our most handy tips, how-to guides, and video tutorials.

If you don't have a Yesware account - we offer a **free trial here**.