Gmail Best Practices Guide:

Tactical Workflows to Drive Better Performance for Sales Professionals

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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.

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		☆ 🍃 Jackie Williams	Inbox Product development March 16, 2020 - BCC: Customer Success, Sales, Marketing Hi team, I've	. Mar 16	6
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No recent chats	10.4	1 GB (34%) of 30 GB used	Program Policies Last account activ	vity: 1 minute ago	,
Start a new one	Man	age	Powered by Google	Details	j l

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.

Q Notifications	Notifications
ු Tracking	
Inbox	Event Notifications On On
Integrations	desktop to notify you immediately when a Yesware event (open or link-click) occurs.
	Quick chat about Preliminary Ventures marissa@acme.com opened - 4:36pm

🏽 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.

O Notifications	Tracking	
ට් Tracking		
	Track Opens	On
🖂 Inbox	Track when a recipient opens an email you sent them	
🖒 Integrations		
	Track Links	On
	Track when a recipient clicks a link in an email you sent them	
	Colleague Events	Off
	Display events when a colleague opens an email or clicks a link	

🌒 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.

D Notifications	Inbox
S Tracking	
Inbox	Compose Toolbar The Compose Toolbar allows you to enable or disable
♪ Integrations	tracking and CRM updates for an email you're composing. It also allows you to use and manage email templates.
	V Irack 🛆 Salesforce 🥔 📅 🕒 Templates
	Response Insights – Composer Widget

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.

O Notifications	Integrations	
S Tracking		
Inbox	Salesforce Use Salesforce and Yesware simultaneously in your Inbox. Automatically record all activity for an email	On
う Integrations	into Salesforce when the toggle in the Compose Toolbar is selected.	
	Linked account: jkeohane@yesware.com	Unlink
	*	
	BCC to CRM	Off
	Capture every customer interaction by automatically	

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.

New Message _ Z ×
Recipients
Subject
JENNY KEOHANE Content Marketing Specialist e: jkeohane@yesware.com p: (617)606-7582 Cesware
$ \square $
V Track Salesforce 🖉 Attach 🛱 Book a Time 🖹 Templates
Send 🗸 🔊 Later 💭 Remind 🛕 🗓 🖘 🐑 🍐 🗖 🗄 📋

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.

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Drafts	62		🟠 🗅 Yesware	Inb	box [Request received	d] Fwd: You've	been accepted to.		Mar 23		Email		jkeohane@ microsoft.c		.on
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✓ More			🛧 🗅 Zoom	Inb	box Your meeting atte	en				-		Possible E	No Yes		
Jenny -	+		🛧 🗅 Shipra Chadh	na Inb	box Updated invitatio	on: Luke / Jenn	ny / Shipra - Blog C.	. 🖸	ar 20		Prevent A	utomated	No		
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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.

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	± • •										>	Out of	Office: Cor	mpleted		

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.

	Yesware Campaigns	
All Campaigns > Nev	Campaign > Add 0 recipients	
∠ Campaign Name 兴 Add Recipients	Compose Touch 1 Automated Email 1 COMPOSE PREVIEW & PERSONALI Touch Type: Touch Type:	IZE
Touch 1	🔀 Automated Email (🐼 Manual Email) 😢 Phone Call) (😰 Custom Task) (🔚 Connect on Sales Navigator)	
Settings	InMail on Sales Navigator Subject Default Font → Default Size → B I U	
	Include Gmail Signature INSERT MERGE FIELD V INSERT TEMP	LATE
START CAMPAIGN SAVE &	EXIT CANCEL	

🏽 Tip:

We recommend 7-9 touches for cold outbound campaigns. On average, it takes at least 5 followups 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.







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.



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.

Campaign Name	🖾 Preview & Persona	lize Touch 1 Manual Email 1 / COMPOSE PREVIEW & PERSONALIZE
Add Recipients Touch 1 Settings	 Touch Content Preview & Personalize aedwards@emailaddress b.kennedy@fakeemail.com carolyn.williams@email.com 	Subject (ICompany)'s Growth Plans This Year Email Body Hi (IFirst Name). Congratulations on the recent (ICapitalRaiseProductReleasePromotionGrowth)! I'm curious how you're thinking about sales productivity for your team. We work with comparable companies like (IComparable Customer). Their sales reps use Yesware to communicate more effectively with prospects/customers. As they use our productivity tools inside Gmail or Outlook, their managers can see data on what's working. This helps them win more business (often times A LO). Given you're the (ITitle) there, I thou
ART CAMPAIGN SAVE & Campaign Name Add Recipients Touch 1		alize Touch 1 Manual Email 1 COMPOSE PREVIEW & PERSONALIZE Personalize for: aedwards@en

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.

	Yesv	vare Campaigns				1
All Campaigns > 01/14/2020 Campaign						
TOUCHES RECIPIENTS						
templates (alson evens@latitudeit.com.au)	PAUSED: OUT OF OFF	ICE 🔂 🕘	1 - 01/14/2020	2 – Paused	01/14/2020	
David Angotti (davidangottidigmail.com)	COMPLETED	00	2 – 01/16/202 0		01/14/2020	
Chris Galt (chris, galt dhdg.co.uk)	REMOVED: OPTED OU	т	-	-	01/14/2020	
Jesus Ibara (essel/Ipage.gpenpie.com)	COMPLETED	0	2 – 01/16/202 0	-	01/14/2020	
Shawn Adams (shawndtsuffalscheck.com)	COMPLETED	٥	2 – 01/16/202 0	-	01/14/2020	
Karon Yee (sarend?ripark/health.com)	CONNECTED	0 0	1 - 01/14/2020	-	01/14/2020	
VC Inc. Marketing (scincmarketing/ligmal.com)	COMPLETED	00	2 – 01/16/202 0	-	01/14/2020	
Della Roberson (della roberson/fecelitiva.com)	COMPLETED	0	2 - 01/16/202 0		01/14/2020	
ADD RECIPIENTS EDIT CAMPAIGN		RESCHEDULE NEXT	TOUCH SKIP NEX	ттоисн ।	REMOVE MOVE TO EXP	PORT



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.

Cai	mpaigns > Demo Idol Campaign > All Recipients	>	
2	f.ohara@demoemail.com	Date Added: Today at 4:15 PM	
мо	IDOL CAMPAIGN		
8	Touch 1 Hi Farryn,Congratulations on t	Touch Scheduled: 4/07/20 at 2:00 PM	~
	Subject	PERSONALIZ	E TOUCH
	Be The Sarah Blakely of Your Team! Email Body		\wedge
	Hi Farryn,		
	Congratulations on the recent participation in the Boston Marathon!	1	ך
		e work with comparable companies like Cash Registers of the Future. Their sales reps use Yesware to communicate mon or Outlook, their managers can see data on what's working. This helps them win more business.	
	Given you're the Sales Ops Manager there, Farryn, I thought a solution lik am a big fan.	ce ours may align with your growth plans this year to sell more POS systmes and help you become the Sarah Blakely of y	to

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.

	Yesware Campa	aigns			
Campaigns	₽ Search for pro	spects or campaigns		0	NEW CAMPAIGN
E ALL CREATED BY ME	ALL SHARED V * STARRED My	Stats		SORT BY: My M	ost Recent 🔹
	৩				
In It for The Long Haul ☆ Sample Campaign by me	™ 1d № 2d ♥ 2d ₽ 2d +1	0 / 0	—%	—%	—%
Short and Sweet 😒 Sample Campaign by me	D od C 3d	0/0	—%	At Anage Recip	
All About the Benefits 🛧 Sample Campaign by me	Co 2d C 3d Co 2d C	0/0	—%	7	-%
Hail Mary - Break Up 🛠	N 4d	0/0	—%	_	—%

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.



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





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 > PQL - Co	Decision Ma	Kel					
TOUCHES RECIPIE	NTS						
lo Active Recipients	1d 😪 2d	Co td 😵 2d 🚺 2d 🖸	2				
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0 filters selected						APPLY CLEAR	wing 0 Recipient
STATUS		INTERACTIONS			TOUCH		ustom Content
Active Ma	nually Removed	Call Connect On:	Any Touch	•	Last Touch:	Any Touch 👻	-
Auto-Email Error Pai	used	Clicked On:	Any Touch	*	Next Touch:	Any Touch 🔻	
Bounced		Opened On:	Any Touch	*			
Completed		Replied On:	Any Touch	*			
Connected		OOO Reply On:	Any Touch	*			

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.

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C 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.

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vare.com	Meeting Scheduler 6
	Select Custom Availability
	C My Calendar Link /jenny-keohane-calendar
	2 15 minutes /jenny-keohane-calendar/15-mins
	30 minutes /jenny-keohane-calendar/30-min
	C 45 minutes /jenny-keohane-calendar/45-min
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U	м	т	w	тн	F	s	9:00 am - 9:15 am	9:15 am - 9:30 am
						4	9:30 am - 9:45 am	9:45 am - 10:00 am
				9	10		11:00 am - 11:15 am	11:15 am - 11:30 am
	13	14	15	16	17			
	20	21	22	23	24		11:30 am - 11:45 am	11:45 am - 12:00 pm
	27	28	29	30	1		1:00 pm - 1:15 pm	1:15 pm - 1:30 pm
	4	5	6	7	8		1:30 pm - 1:45 pm	1:45 pm - 2:00 pm

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.

Yesware - & ACTIVITY				
		K MY REPORTS		
- Compose	D- 9		1-11 of 11 < > 🏚	31
		x jsullivan added you to	the card Social: Daily Social Post - Facebook, Linkedin, Twitter, Instagram 1:01 PM	Ø
	🗆 🛧 🔰 y Baymore 🛛 Inbox	x Thank You for Attend	New Message 🐣 ×	-
Starred	a Santos (via. 🛛 Inbos	x SGO Yesware Take-ov	Recipients	0
Snoozed	Inbox	x Virtual Ask Me Anyth	Subject	v
		x [Request received] Fv		
demo				
More		 Accepted: Ian / Jenny 	e: jkeohane@yesware.com	+
Jenny - +	🗋 🛧 🖸 Zoom 🛛 Inbox	 Your meeting attende 	p: (617)606-7582	
	🗌 🏠 🗁 Shipra Chadha 🛛 Inbox	x Updated invitation: Lu		
1	🗌 🚖 🍃 Jackie Williams 🛛 Inbox	x Product development		
1	🔲 🕁 Ď Jen Sullivan 🛛 Inbox	x Accepted: social stra		
	🗌 🏫 🐌 Lydia Marzot 🛛 Inbox	x 😽 Email Signature &		
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± • •			Send 🔹 🗐 Later 💭 Remind 🛕 🗓 C-3 😳 🔥 🖪 🗄 🗎	>

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.

	Yeswa	are Templates			X
Templates		دی Search		Ν	EW TEMPLATE
() Recently Used	S Recently Used				
ా My Favorites					
🖇 Personal Folders 🛛 🖂	Data updated: Apr 3, 2020 2:00 PM EDT			⑦ Ho	w are these stats calculated?
	Name		Sends	Open %	Reply %
🗅 Cold Email (3)	1				
🗅 Follow-Up (5)		//competition/field) and thoug hought it did a good job of ca	0	0%	0%
🗅 Keeping-in-Touch (4)					
🛅 Break-Up (3)					
🗅 Personal (1)	Praise ☆ Really impressed with your work. Hi (!FirstName), We haven't met in person, bu	ut I've been impressed with your (!speci	0	0%	0%
Account Executives (13) 🕀	Cold Email				
🐃 New Sample Templa (1) 🕀	Congratulations 🏠				
	Congrats on (!Special)! Dear (!FirstName), You and your team have r	eally accomplished something. The [!fe	0	0%	0%
	Post Call Wrap-Up 🏠 (!Company) Call Summary Great speaking with you today, (!FirstName)!	I'm glad we agree (!my company) woul	0	0%	0%
		ara o			

🏽 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.

	Yesware Templates			
Templates	-& Q. Search			VEW TEMPLATE
S Recently Used	③ Recently Used			
☆ My Favorites				T
A Personal Folders	Data updated: Apr 6, 2020 11:00 AM EDT		© H	iw are the state of the colourate
Cold Email (3)	Name	Sends	Open %	Reply
 Follow-Up (5) Keeping-in-Touch (4) 	Adding Value & Subject He (WithNore) / I found on article on (Industry/competition/Reld). This article appared in (publication/vebsite/bills). I thought it did a good Calif Uner		0%	,
D Break-Up (3)	Praise () Anony improved with your work. It [FirstName] We haven't met in person, but I've been impressed with your () Continued	our (hsp., 0	0%	0%
Account Executives (13) 🕀	B cod brat			
- New Sample Templa (1) 💿	Congratulations & Congrets on (Tipe-Colf) Dere (Finithema, You and your team have really accomplished somethin () Cold Dere	g. The [0	0%	0%
	Post Call Wrap-Up & (Company) Coll Summory Great speaking with you today, (FirstName) Fin glad we agree (Imy comp () Follow 00)	any)w 0	0%	0%

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.

	Yesware Templates		
emplates			
© Recently Used	Template Name*	Save in Folder*	
A My Favorites	Demo	Save in Folder	EDIT
Rersonal Folders	Subject		
	Congrats on {!Special}!		
🗅 Cold Email (3)	Body*		
🖰 Follow-Up (5)	Default Font - Default Size - B I U A - E	· III E · 8 %	<u></u> ×
🗈 Keeping-in-Touch (4)	Hi {!First Name}		
🗈 Break-Up (3)	You and your team have really accomplished something. The $\{!\mbox{featbox}\$ big impression	ature/product/press} yester	y a
🛅 Personal (1)		Text Field	
Account Executives (13) +		Salesforce Field	
🖁 New Sample Templa (1) 🕀			
		Dropdown Field	
		INSERT ATTACHMENT INSERT MERGE FIE	
	¥		LD ^

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.

			Ye	sware Ten	nplates											
lemplates																
© Recently Used		Template Name*								Save	in Fold	er*				
A My Favorites		Ask About Accomp	plishments							Ke	eping-	n-Touch				EDIT
് Personal Folders	Θ	Subject														
🗁 Cold Email (3)		Your great news g	ot me thinking													
		Body*	The second se													
🗀 Follow-Up (5)		Default Font -	Default Size 👻	Β.	Γ⊻	<u>A</u>	•	ΞΞ	:=	- 1		E -	P	\$??	$\langle \rangle$	<u></u> ×
🗀 Break-Up (3)				om fle	[aurcal	on s	Icub	inct]	hoca	ico it e	aama	d to cr	oak to		 atio	
🗅 Personal (1)	Æ	This morning I from materials you por 1. {!ask about	t you an article fr ound out {!exciti osted, I had two ut how it works}	ng new	s}! Cor										 ntio	n.
	•	This morning I fr materials you po 1. {!ask abou 2. {!tie in to I ask because m	ound out {!exciti osted, I had two	ng new question	s}! Cor ns: X} and	ngrat	ulati	ions t	o you	and y	our te	am. In	lookin		 to	1.
Personal (1) Account Executives (13)		This morning I fr materials you po 1. {!ask abou 2. {!tie in to I ask because m	ound out {!exciti osted, I had two ut how it works} your product} ny company make	ng new question	s}! Cor ns: X} and	ngrat	ulati	ions t	o you Ilways	and y	to fir	am. In	lookin		 to	n.

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).

	Yesware Templates	
Templates		
() Recently Used	Template Name* Save in Folder*	Response Insights - 4/4
☆ My Favorites	Ask About Accomplishments Keeping-in-Touch	EDIT Subject Length ✓ 6
Personal Folders	Subject	
🗀 Cold Email (3)	Your great news got me thinking	Question Count 🗸 1
🗂 Follow-Up (5)	Bedy* Default Font ▼ Default Size ▼ B I U A ▼ 1 = ▼ I = ▼	
🗅 Keeping-in-Touch (4)		Grade Level ✓ 6
Break-Up (3) Personal (1) Account Executives (13)	<pre>{!FirstName}, Last week I sent you an article from {!source} on {!subject} because seemed to speak to your situation. This morning I found out {!exciting news}! Congratulations to you and your team. In looking over the materials you posted, I had two questions: 1. {!ask about how it works}</pre>	
	2. {!tie in to your product} I ask because my company makes {!XXX} and {!YYY}. I'm always tryit to find new applications and to learn new approaches for our work berrie INSERT ATTACHMENT INSERT MERGE FIEL SAVE TEMPLATE CANCEL Response Insights	An ideal subject line typically falls

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

	Yesware Templates	×
Templates		
Personal Folders	ccomplishments eves not me thinking Save in Folder Template Type Personal O Team Save in Folder Keeping-in-Touch Keeping-in-Touch Break-Up	Save in 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.

) Recently Used	③ Recently Used			
7 My Favorites	Data updated: Aug 7, 2019, 1:29 PM			w are trats calculated
Personal Folders	Template Name	Sends	Open %	Reply % 4
🗅 Cold Email (3)	Onboarding Review/CSM Transfer ☆			
🗅 Follow-Up (5)	Yesware Onboarding Review & CSM Introduction Hi (!FirstName), (!Greeting!) Thanks so much for attending (!today/yester	14	93%	79%
🗅 Keeping-in-Touch (4)	E Scheduling Calls			
🗅 Break-Up (3)	Change DocuSign Signers 🏠			
🗅 Miscellaneous (2)	No subject If you need to change signers, you may do so by clicking "Review Docu Former CSM Templates	5	80%	40%
🗅 Former CSM Templates (24)				
🗅 Install & Adoption Ema (15)	Jackie Weekly Attendee Count Email & Weekly One to Many Attendee Count	9	33%	33%
Scheduling Calls (8)	Hi Jackie, Here are the One to Many attendee counts for the week of {!	5	5576	5570
🗅 Demo Templates (7)	NPS Response - Positive w/out comments &			

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

New Message		Draft saved $- \epsilon^* \times$
Recipients	Yesware Templates \mathcal{C} \times	Recipients
Subject	Search by content or #category	Subject: Hi {!FirstName}! I found an article on {!industry/competition/field} and thought of yc
	Recent 🔶 Favorites All	This article appeared in (!publication/website/blog). I thought it did a good job of ca GET INSIGHTS dynamics of (!the situation): (!link).
- JENNY KEOHANE Content Marketing Specialist e: jkeohane@yesware.com	Adding Value	I've been thinking about this because my company is struggling with the same issue. Although we just launched {!feature/product} and recently signed {lcustomer/competitor}, we've been
p: (617)606-7582 Yesware	Praise	working on {lissue}, like {the company profiled}. I'd like to follow up <u>about</u> this with a quick phone call. Do you have 20 minutes to speak with me at {time and date}?
	Congratulations Dear (IFirstName), You and your team ha Cold Email	
E	Post Call Wrap-Up 🙀 Great speaking with you today, (IFirstNa_ Follow-Up	e: jkeohane@yesware.com p: (617)606-7582 Vesware
	Cold Outreach Compliment recent ac 🏠	v 0
Sans Serif ▼ T ▼ B <i>I</i> U	SAVE AS TEMPLATE ALL TEMPLATES	いっ Sans Serif ・ T・ B J U A・ E・ 注注 運 運 ・
V Track 🛆 Salesforce 🖉 Atta	ach 📅 Book a Time 🗎 Templates	🏈 🔽 Track 🛆 Salesforce 🖉 Attach 📅 Book a Time 🗎 Templates
Send 🔹 🖪 Later 🗘 Remind 🛕 🕻		Send ◄ ✓ Later Q Remind ▲ 0 G⊃ ② △ ■ : ■

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.

C	2	Search mail			*	 0	Vesware	V	SALESFORCE	CAMPAIGNS	LINKEDIN	×
TY			MAIL MERGE	CAMPAIGNS					in SALE	S NAVIGAT	OR	
		C :: me, Varsha 3 me, Varsha 2 me, Adam 3 me, Melissa 2 me, Varsha, Draft 3	 Congr Congr Congr Blue C Just T 	New Message Joel Stevenson (jstevenson@yesware.c Congrats on the funding! Dear Joel, You and your team have really accomplish big impression with the people I talk to. I w	ed something. The re		making a	•	2127 cc QD 44 shar Current Yesware • 1	Joel Stev CEO Boston Area onnections ed connection mo +1 more sales Navigato	ns	***
0		Yesware Yesware	17 sh		Attach 🗄 Boc	Tem;	plates 🔭	+	9		irman Of The ssachusetts onnections	

🌒 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.

≡	M Gmail		Q label:demo	× -	⑦ III VSvesware			
1 276	esware - 👌	ACTIVITY	Y 🕒 TEMPLATES (CAMPAIGNS AY REPORTS				
+	Compose		□• c :	Really Impres	_ 2 ×			
-			🗌 🕁 Ď Trello	Jen Sullivan				
	Inbox 157 Starred Snoozed		🔲 ☆ 🍃 Bethany Baymo	Bethany Baymc Email me a reminder				
*			🗌 🚖 应 Camilla Santos	 Only if nobody replies 				
>	Sent		🗌 🛧 🕨 zoe	Send reminder at	your work for some time.			
	Drafts 71		🗌 🚖 Ď Yesware	04/09/2020 🗂 8:30am 🔇	nazing work.			
	demo		🔲 ☆ 🗩 Ian Adams	 In 1 hour In 2 hours 	 My company is having its could really help us 			
R.	Jenny 👻	+	□ ☆ ⊃ Zoom	() In 24 hours				
			🔲 ☆ 应 Shipra Chadha	Next weekday morning Next weekday afternoon	Ye can cover important			
			🔲 🚖 🍃 Jackie William:	 In 1 week In 1 month 				
			🔲 🚖 Ď Jen Sullivan	Did they sign the form? If not, follow up				
	No recent chats Start a new one		🔲 ☆ 🍃 Lydia Marzot		🖉 🛱 🗎 Templates			
				🗭 Set for: Thursday, April 9th at 8:30 AM				
	÷ 🗣 📞		10.44 GB (34%) of 30 GB used	Confirm Cancel				

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.

	Gmail											Yesware	
Yesware		Y	🕒 TI	EMPLA	TES	CAMPAIGNS	K MY REPORTS						
Compose			C	3	:	Really Impressed Wit	h Your Work					- 2 ×	
			άΣ	Tre	llo	Jen Sullivan							
Inbox 156			☆ >	Bet	hany Bay	Really Impressed \	Work		_				
Starred Snoozed			ά Σ	Can	nilla San	Hi Jen,							
SnoozedSent		🗌 🕁 ⋗ zoe		We haven't met in p				your work for some time.					
Drafts	71	□ ☆ ∑ Yesware		ware	This isn't a particulai	azing work.							
demo				🗁 😕 lan	Pick a tin	I was wondering if I could ask you a couple of question te to send this email			tions My company is having some eally help us accelerate.				
Jenny -	+		☆ Σ	Zoc	0	April 2020	04/09/2020		an cover i	mportant i	ssues in	20	
						Tu We Th Fr Sa	3 - : 00 - PM	*					
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			☆ Σ ☆ 】		5 6 12 13	7 8 9 10 11 14 15 16 17 18	America / New York	•				- 1	
			☆ 🔰		5 6 12 13 19 20 26 27	7 8 9 10 11 14 15 16 17 18 21 22 23 24 25 28 29 30		• end?) \ • =	• 13	:= ₫		
No rec	ent chats new one		☆ 】 ☆ Σ	Jac	5 6 12 13 19 20 26 27 Email will	7 8 9 10 11 14 15 16 17 18 21 22 23 24 25 28 29 30 be sent Thursday, Apr 9 at		• end?		• 1=		Templates	

C 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.

New Message _ 🖉	×
Recipients	
Subject	
- JENNY KEOHANE Content Marketing Specialist : jkeohane@yesware.com : jk17)606-7582 Seswore	
🎸 🗹 Track Salesforce 🖉 Attach 📅 Book a Time 🖹 Templates	
Send 🗸 🍕 Later 🔔 Remind 🛕 🕅 🖙 🙄 🛕 🖪 🗄	i

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 I	History	Log a Call Mail Merg	e 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	1	4/17/2018	Bethany Baymore	4/17/2018 1:40 PM
Edit Del	Presentation Viewed in Message: Any interest	t in Yesware?	Baymore Enterprises	1	4/17/2018	Bethany Baymore	4/17/2018 1:40 PM
Edit Del	Message Sent: Any interest in Yesware?		Baymore Enterprises	1	4/17/2018	Bethany Baymore	4/17/2018 1:37 PM
Edit Del	Reply: Incoming Request for Training		Baymore Enterprises	1	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.

= M Gmail	Q label:demo	>	· • ⑦	::: Vesware		ŝ	•••	in.	\bigcirc	
	TY 🖹 TEMPLATES 💬 CAN	MPAIGNS 📈 MY REPORTS				÷			ground Sync: MY TAS	
 Compose Inbox 137 ★ Starred Snoozed Sent Drafts 65 demo ✓ More Jenny * + 	Camma tos (via ☆ > zoe ☆ > Yesware ☆ > lan Adams	Itew Message Ifgvhjbnkvtc@gmail.com Subject EINNY KEOHANE Content Marketing Specialist : [kaohane@yesware.com : (617)806-7582 Yesware	1-11 of 11	< > \$		Create Contact I First Name None *Last Nam Trello *Account I Account Title Email do-not-re	e Name	om	٩	
No recent chats Start a new one	10.42 GB (34%) of 30 GB used Manage	ा Sans Serif र तार B I U Salesforce @ At	A ▼ E ▼ Ξ			Zoominfo	Mobile Phon	c		
± • •	-	Send - 🛛 Later 🚨 Remind A) c> 🔾 🛆	🖪 i 🗑	>	SAVE				

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.
= M Gmail	Q label:demo X 🔹 🕜 🏭 🤣 Yesware 🌗		in. 🔘
	🕒 TEMPLATES 🖂 CAMPAIGNS 📈 MY REPORTS	÷	Background Sync: ON PERSON MY TASKS
1	← 🖎 🕢 🗊 🖻 🕲 🖿 🖿 : 💆 💿 👂 20f11 < > 💠 🛐	Q Search for Conta	
Compose Inbox 137 Starred	Thank You for Attending Yesware's Cold Outreach Webinar	NEW TASK NEW EVEN	
Snoozed Sent	👔 Bethany Baymore Fri, Apr 3, 11:04 AM (4 days ago)	CONTACT Name Account Name	Bethany Baymore Yesware
Drafts 67	Hi Jenny, Thank you attending yesterday's webinar: "Navigating Cold Outreach During Uncertain Times: How to	Title	Implementation, Training Manager
 More 	Use Camp: specting and Follow Up." I hope you found the content valuable and were able to get a sense of how you campaigns to help you along the way to strengthening your cold outreach game. Below, I've + linked some ources:	Email Pardot Country in E	bbaymore@yesware.c om No
∭ Jenny - +	Revelopment webinar sented	Account: Possible E Opt-in: Sales Outrea	No
	 Jenny Keohane's blog post: "How to Reignite Your Cold Outreach Strategy During the COVID-19 Crisis" Campaigns Content from Yesware U (videos and how-to articles) Barry Rhein's Selling Through Curiosity Program - this was referenced a couple times during the 	Prevent Automated Contact Owner	No John Kelley
	presentation If you have any questions, Jenny, please feel free to reach out to our awesome Support Team at support@yesware.com or 855-YESWARE and they would be happy to assist.	Phone Email Has EU Top L	t +1 617-379-3214 No
No recent chats Start a new one	I hope you, your loved ones, and colleagues are staying happy and healthy during these times of uncertainty.	Pardot Country Account: Billing Cou	United States United States / USA
	Take care, Bethany	Email Opt Out Additional Informati	No Ion human resources
- • ·	- BETHANY BAYMORE Implementation & Training Manager >>	EDIT	mandii resources

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.

1	Yesware		
<i>i</i> ≈	Admin ACCOUNT	Salesforce	
	Account Summary	Authentications	
<u></u>	Plan and Usage	Salesforce – ON	
¢	Account Preferences		jkeohane@yesware.com – Deauthorize
275	Salesforce Preferences	Frankla / Disable Frankla	
	MEETING SCHEDULER	Enable / Disable Feature	25
	Settings	Feature	Notes
		Calendar Sync 1	♂ This feature is enabled – Disable

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.

	Mar 23, 2018 2:00pm	to 3:0	00pm Mar 23, 2018	TIME ZONE		
(All day Does not rep	eat 👻				
Ø	Sync Calendar Event Primary Contact/Lead	to Salesf	orce 🕜 📭		On	Add Guests From Salesforce
	Varsha Menon	×	Yesware	×	+ ADD	Search by name or email

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.

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Yesware ~		Y 🖹 TEMPLATES 📁 CAMPAI	GNS 📈 MY REPORTS				
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🚺 Jenny 👻	+	🔲 🛧 Ď Shipra Chadha	Inbox Updated invitation: Luke / Jenny /	/ Shipra - Blog CTA's @ Fri Mar 2	20, 2020 2pm - 2:3	Mar 20	
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		🔲 🚖 Ď Jen Sullivan	Inbox Accepted: social strategy @ Thu M	Mar 5, 2020 1pm - 1:45pm (EST)) (jkeohane@yes 📋	Mar 4	
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No recent chat Start a new one		10.44 GB (34%) of 30 GB used Manage	Program Policies Powered by Google		Last account activity: 0 Open in 1 other loca		
: O L							

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.

Reports > Email Acti	ivity o	Q Searc	ch	× •®	DOWNLOAD REPORT
Email Activity	Reporting period	Filter users by	Advanced filte	rs	Sort by
Templates by User	🛱 Last 7 days	All Teams	✓ None Selecter	ed 🗸	User 🗸
Templates by Template	You vs Team Average	Emails Sent	Emails Tracked	Open %	Reply %
Recipient Engagement Link Click Engagement	Jenny Keohane	10	10	90%	50%
	All Teams (avg)	30	29	77%	39%
\land	Data updated: Apr 8, 2020 3:00 AM EDT				1 - 9 of 9 use
	User ↓	Emails Sent	Emails Tracked	Open %	Reply %
	Doug Ellinger 왔 New Sample Templates	0	0		-
	Ian Adams ,&& Account Executives, New Sample Templates	23	23	83%	52%
	Inessa Lurye ,ଝ୍ଲ୍ New Sample Templates	6	3	67%	0%
	Jennifer Sullivan	12	7	100%	29%

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.

		Yesware					_
Reports > Template	s by User 🛛		Q Sea	arch	×	. S	DOWNLOAD REPORT
Email Activity		Reporting period	Filter users a	nd data by	Advanced filters		Sort by
Templates by User		🛱 Last 7 days	All Teams	~	None Selected	~	Templates Used
Templates by Template Recipient Engagement	You vs Team Average		Templates Used	Templates Tra	acked	Open %	Reply %
Link Click Engagement	Jenny Keohane		0		0		
	All Teams (avg)		2		5	83%	52%
	Data updated: Apr 8, 202	0 3:00 AM EDT					1 - 9 of 9 use
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	John Kelley 왔 Account Executives		8		29	93%	55%
	Sarah Freshman 왔 Account Executives		6		18	67%	44%
	lan Adams 왔 Account Executives, N	ew Sample Templates	1		1	100%	100%
		ew Sample Templates	1		1	100%	10

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.

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✓Yesware ~	activity		Г	EMPLATES	CAMPAIGNS		K MY REPORTS						
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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.

			Yesware Campaigns					
Il Campaigns > Short and	Sweet							
TOUCHES RECIPIEI	NTS							
							How do we calculate to	ouch stats? 🚯
Campaign Name Short and Sweet								
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fter 0 business days, if there is no con	nection, start Touch	2.						
Fouch 2 In this email, you've	0% CONNECT RATE	0% DID NOT CONNECT	0 CONNECTED	0 SCHEDULED	0 DELIVERED	0 SKIPPED		>
fter 3 business days, if there is no con	nection, start Touch	3.						
Touch 3 The breakup (leave	0% REPLY RATE	0% 0% OPEN RATE CLICK RATE	0 REPLIED SO	O	0 DELIVERED	0 SKIPPED		>
						\		
ADD RECIPIENTS EDIT CAMPAIG	N				(Campaign Not Shared	SHARE DUPLICATI	E DELETE

🏽 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."

	Yesware Templates
Templates	
() Recently Used	은 Personal Folders > 🗅 Cold Email (3) > Adding Value
ු My Favorites	Template Name Sends Open Reply
	Adding Value 🖄 0% 0%
Account Executives (13) 🛛 🕀	Subject
🚆 New Sample Templa (1) 🕕	Subject: Hi {!FirstName}!! found an article on {!industry/competition/field} and thought of you.
	Body This article appeared in {!publication/v dynamics of {!the situation}: {!link I've been thinking about this because my co- launched {!feature/product} and rece on {!issue}, like {!the company prof I'd like to follow up about this with a quick p and date}?
	INSERT EDIT DUPLICATE SHARE WITH TEAM MORE ~
	Last updated: 9 months ago

🏽 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 - <u>Yesware U</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.

