

O365 Best Practices Guide:

Tactical Workflows to Drive Better Performance for Sales Professionals

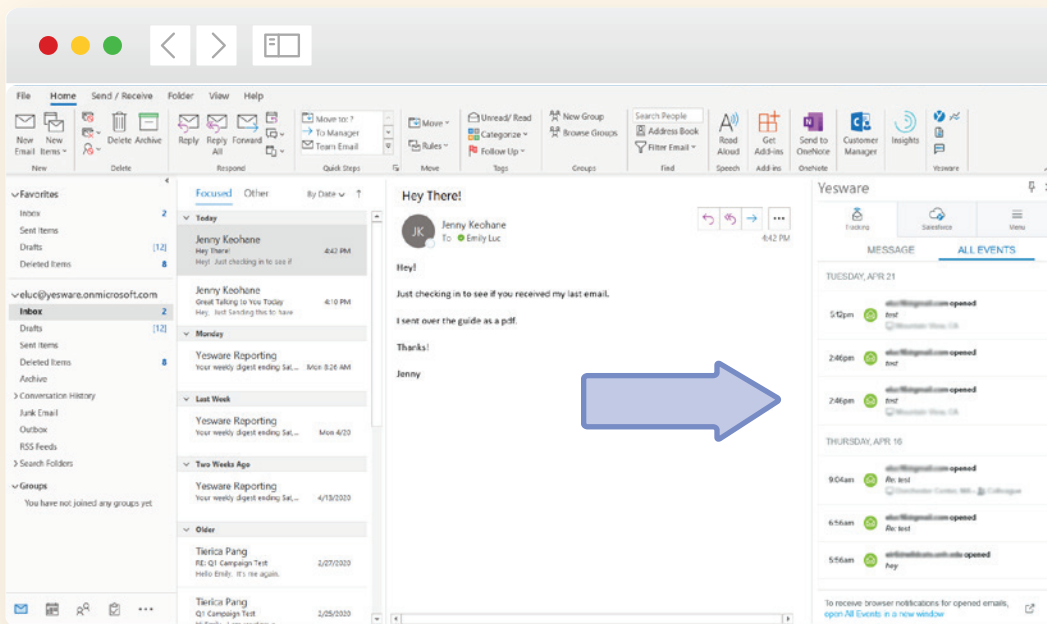


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Introduction

“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 O365

1. Installation

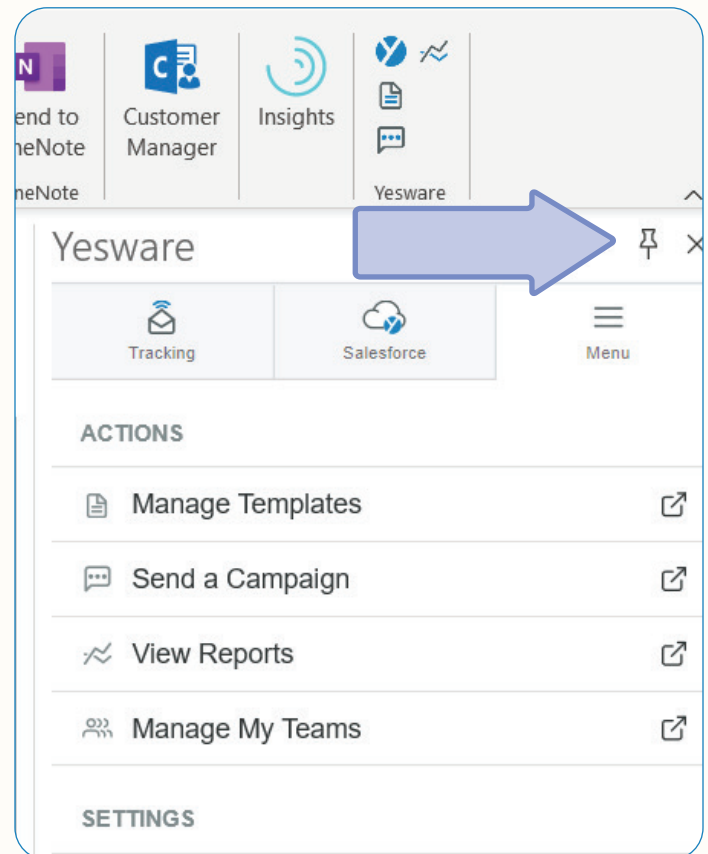
Installing Yesware is extremely simple and takes no more than about a minute.

You can install Yesware 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 and then you'll need to sign into 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 [Outlook](#). It won't overwrite your existing account - it will just ensure you go through the entire installation flow.

Like any Microsoft add-in, you'll need to be clicked on an email message for the add-in to appear in your inbox. If you've clicked on an email, you should see the Yesware icon, a blue Y, that appears on the right-hand side of your Outlook ribbon. Clicking on that will open the Yesware Sidebar, which gives you access to Yesware's features.

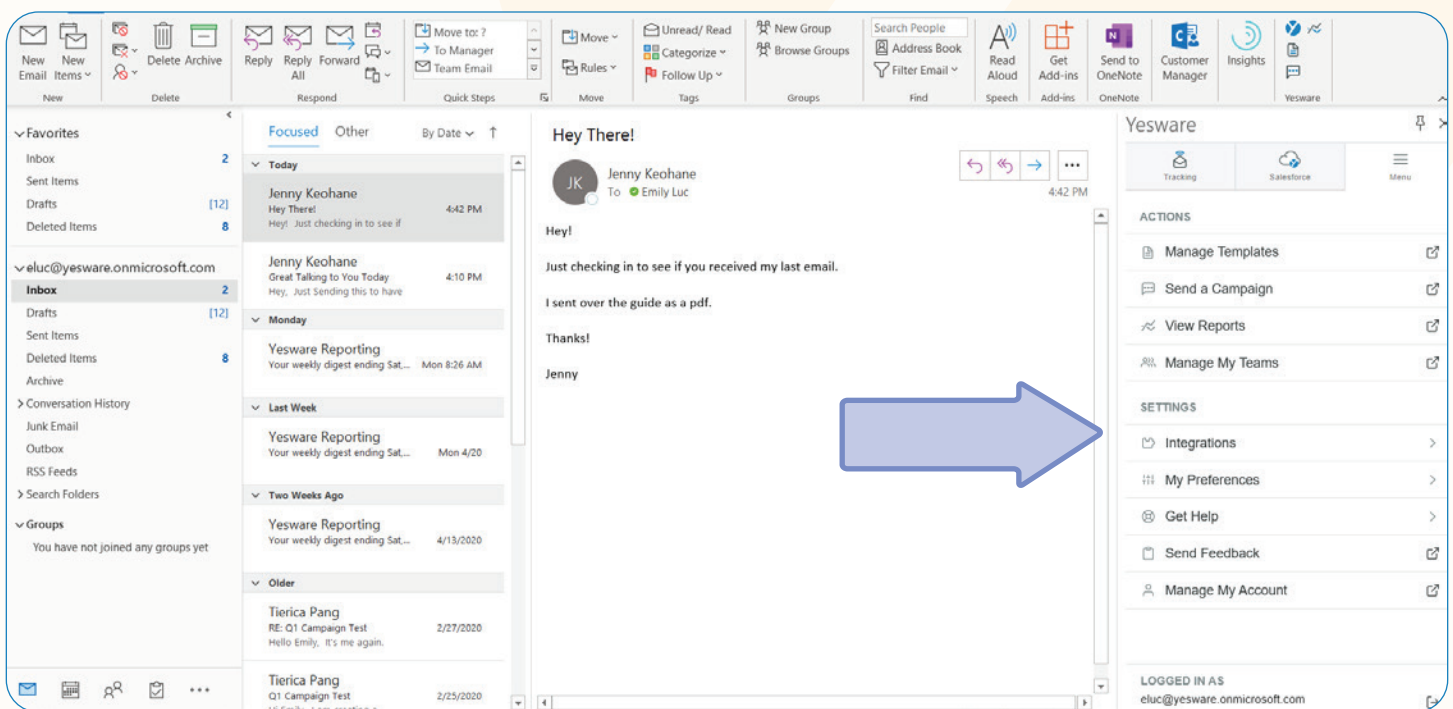


Tip:

Pin the Yesware sidebar with the pushpin icon, that way each time you are looking for the sidebar it will automatically be there and available for you.

2. Preferences

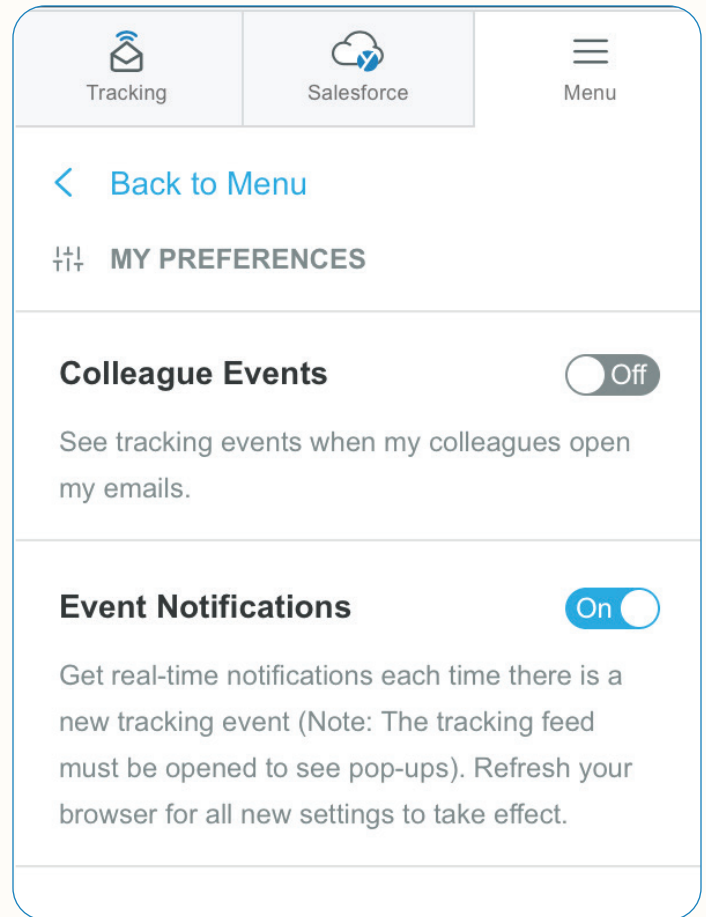
In your Yesware sidebar, in the Menu tab, click “My Preferences” to change your preference settings.



In Preferences, make sure to turn on event notifications.

This will allow you to get real-time notifications of new tracking events. This helps give you an indication of their interest level and how recipients are interacting with your emails. Getting notifications will allow you to act on these engagements quickly and efficiently.

Turn “Colleague Events” on if you want to also be notified about colleague interaction.

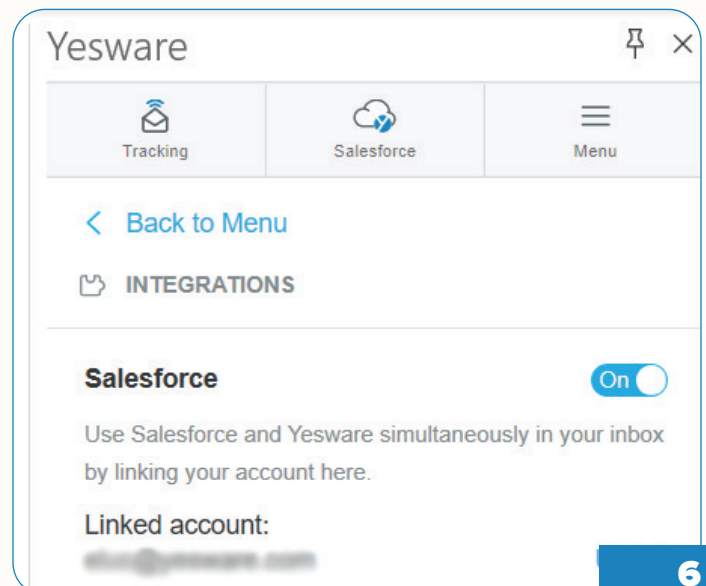


Tip:

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

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.



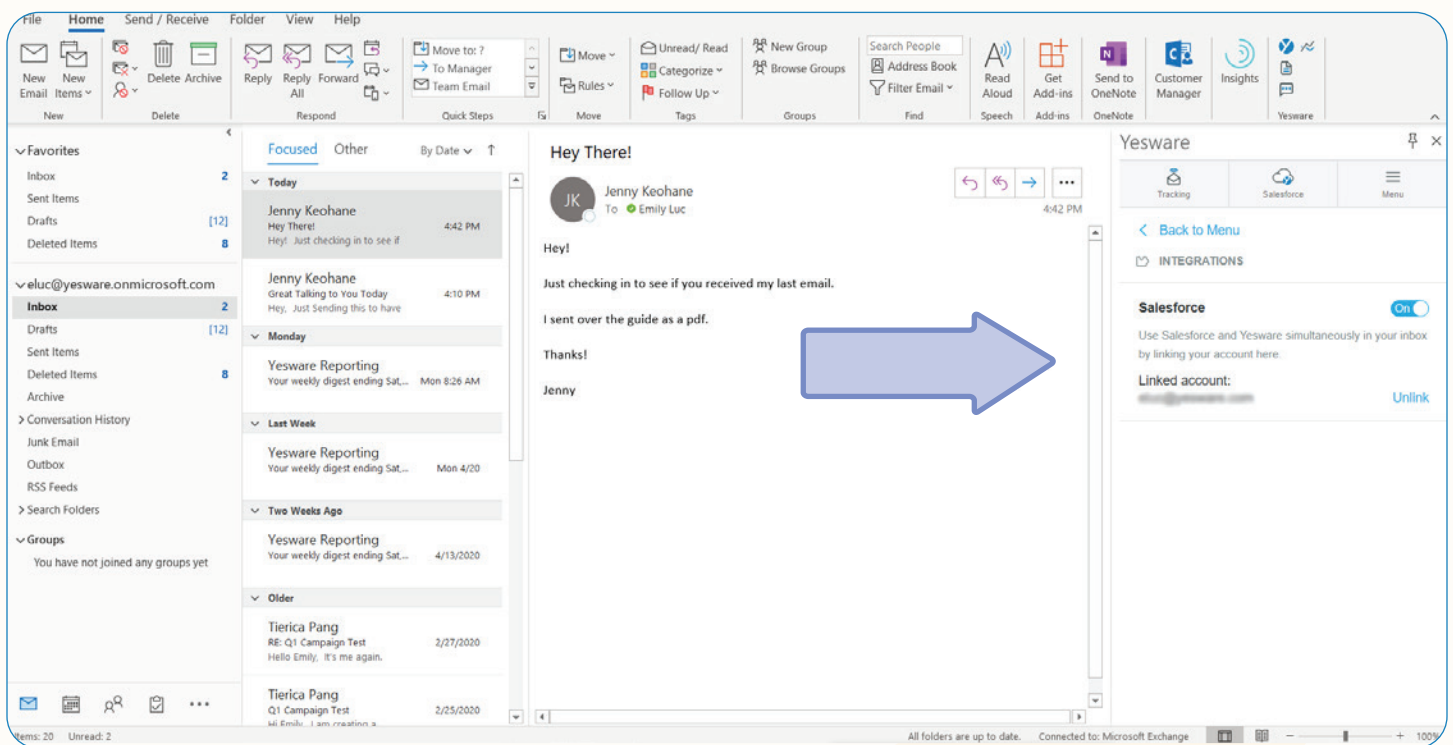
3. Salesforce Integration

If you're on our Enterprise plan and already use Salesforce, it's easy to incorporate Yesware to automatically store emails from O365.

The Send with Yesware functionality will store not only sent emails in Salesforce, but will also capture replies, open events, viewed attachments/presentations and link-click events into Salesforce automatically.

After a one-time setup, Yesware will add these tracking events to Salesforce for the contact or lead you're communicating with.

Under Integrations, make sure Salesforce is toggled on.



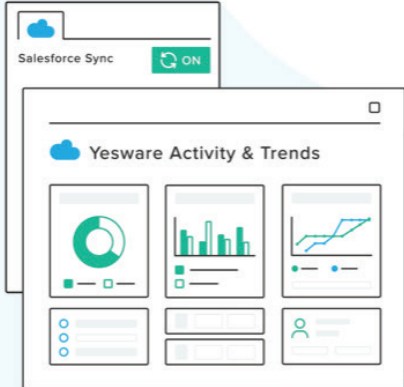
Then, under the Salesforce tab, make sure to authenticate with Salesforce.



Tracking Salesforce Menu

Yesware CRM Connect

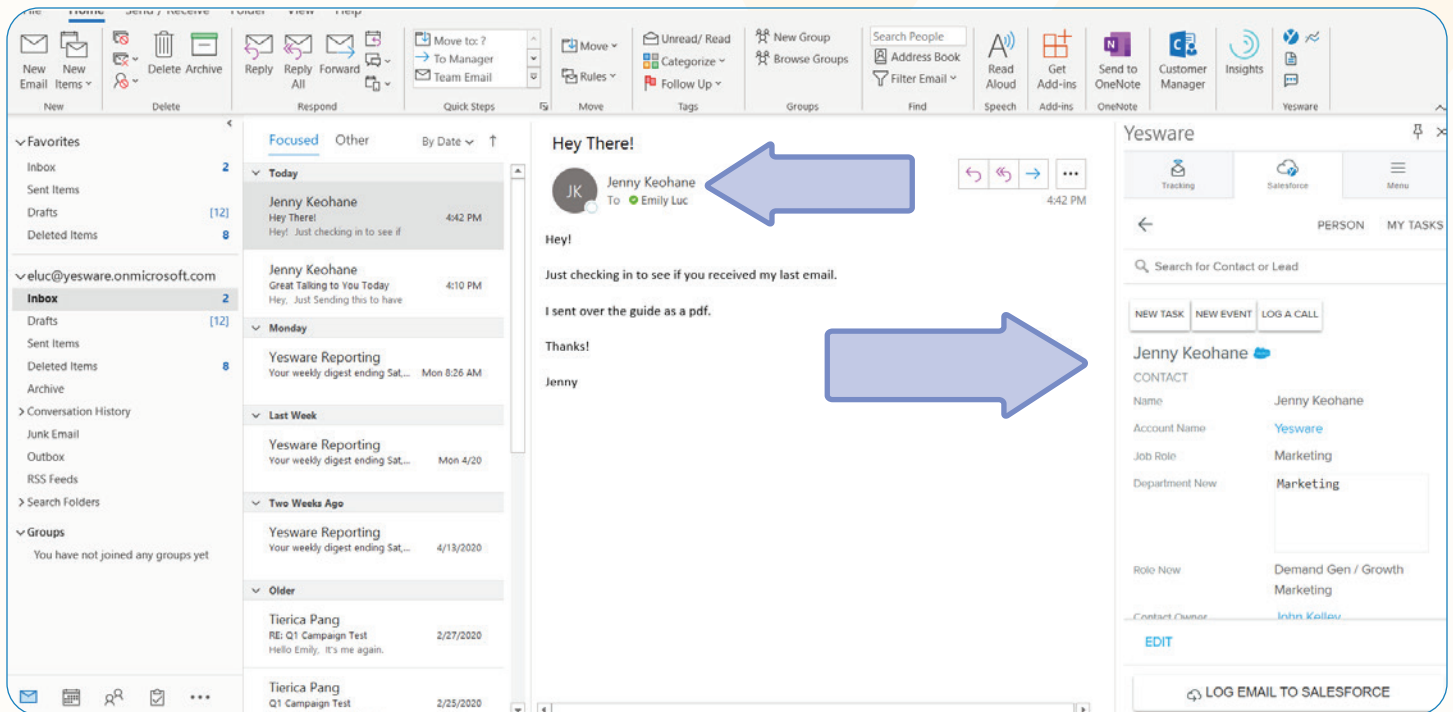
In order to update your CRM, we need access to your Salesforce account.



AUTHENTICATE WITH SALESFORCE

The image shows a mobile application interface for Yesware CRM. At the top, there are three navigation tabs: 'Tracking' with a location pin icon, 'Salesforce' with a cloud icon, and 'Menu' with a hamburger menu icon. The main content area features the title 'Yesware CRM Connect' and a message: 'In order to update your CRM, we need access to your Salesforce account.' Below this is a screenshot of the application's dashboard. The dashboard includes a 'Salesforce Sync' toggle switch set to 'ON' and a 'Yesware Activity & Trends' section with several data visualization widgets, including a donut chart, a bar chart, and a line graph. At the bottom of the interface is a prominent blue button with the text 'AUTHENTICATE WITH SALESFORCE' in white capital letters.

Once you've set up, you will see the Salesforce Sidebar in Outlook, to the right of your inbox.



Now that you're synced up, all of your Yesware activities will automatically push to the associated contact or lead in Salesforce.

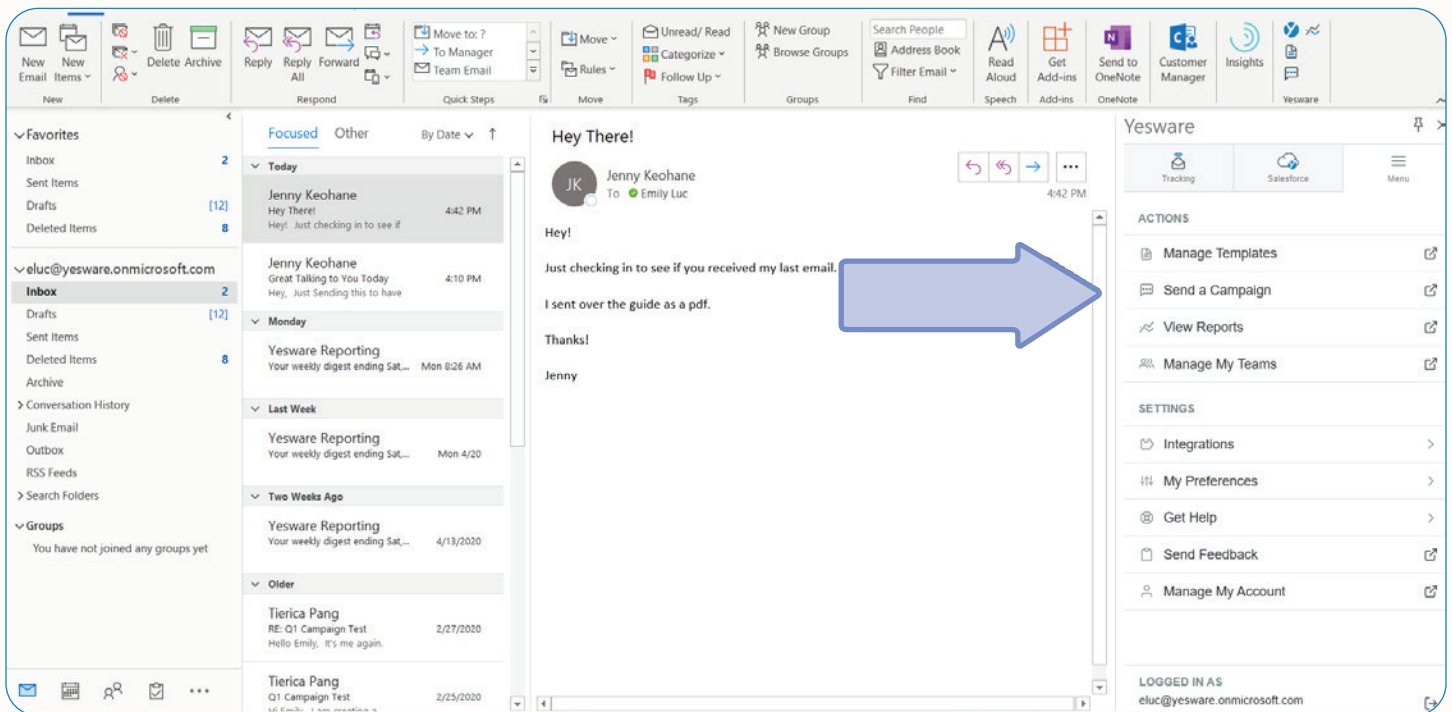
We will cover more on Salesforce Integration in the "Syncing Activity" section of this guide.

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.

To access and create your campaigns, go to the menu section of the Yesware sidebar and select Send a Campaign.



This will open up your Campaigns Dashboard where all of your campaigns will live - whether they're active or inactive.

To create a new campaign - at the top right of your Campaign Dashboard, click the blue "New Campaign" button.

The screenshot displays the Yesware Campaigns Dashboard. At the top right, a blue button labeled "NEW CAMPAIGN" is highlighted with a blue arrow. The dashboard includes a search bar, filter options (ALL, CREATED BY ME, ALL SHARED, STARRED, My Stats), and a "SORT BY: My Most Recent" dropdown. A "Welcome to Campaigns!" message is followed by a "Sample Campaign" entry in a table. The table has the following data:

Campaign Details	Recipients/Touch	In Progress/ Total Recipients	Open %	Click %	Connect %
Sample Campaign ☆ Sample Campaign by me	2d 5d	0 / 0	—%	—%	—%

The first thing you'll want to do is name your campaign. Remember, you can use these campaigns over and over again so try to be specific in your naming convention, that way you can easily find it later.

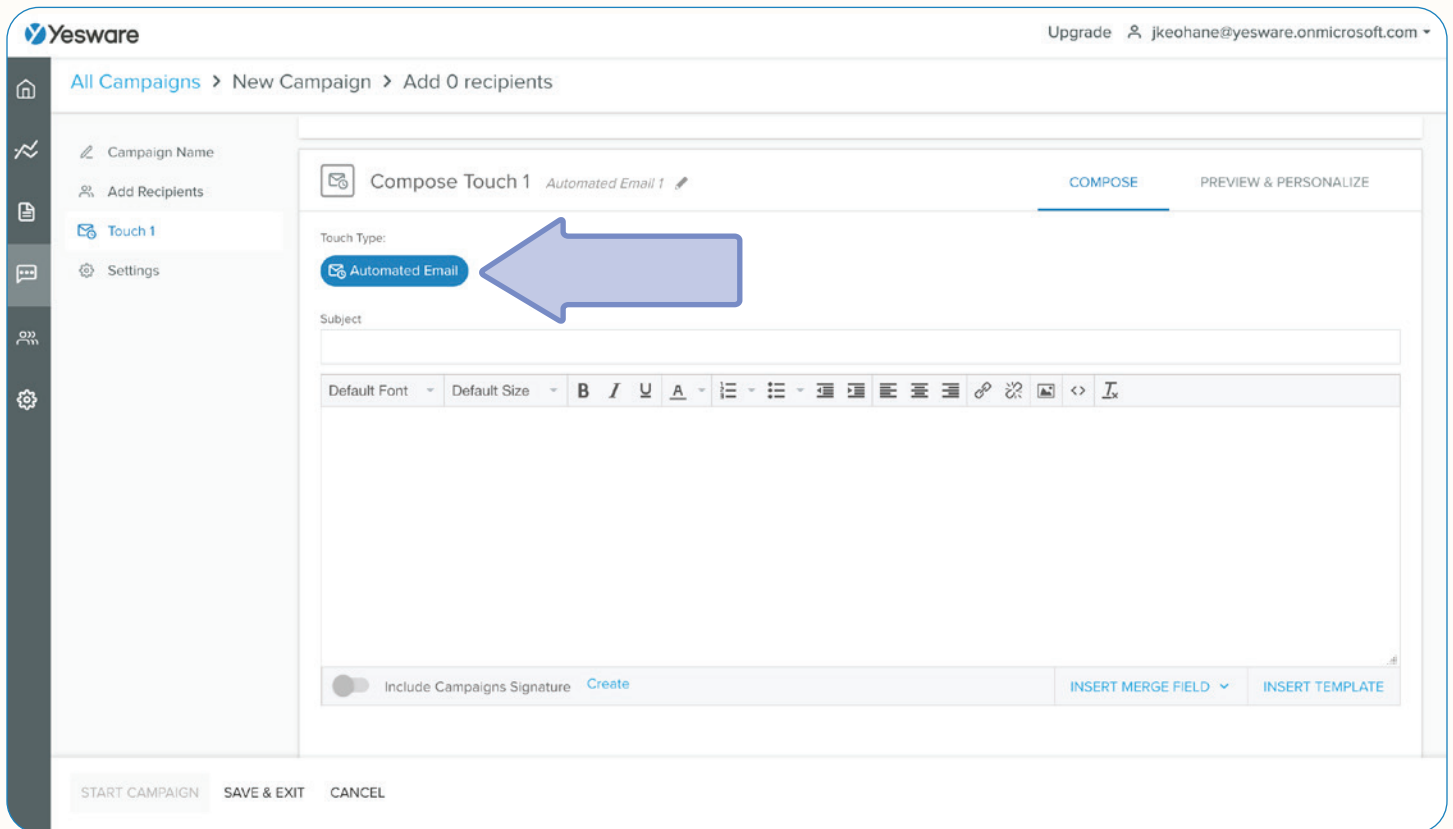
To add recipients: you can add them from Salesforce, a CSV file, or by manually adding recipients. We recommend uploading a CSV file - it's an easy way to upload all recipient email addresses along with their information with the click of a button.

The screenshot shows the Yesware interface for adding recipients to a campaign. The campaign name is 'Cold Outreach Campaign'. Under the 'Add Recipients' section, there are two options: 'A. UPLOAD .CSV FILE' and 'B. Have a Salesforce account? Link your account to search contacts and leads in Salesforce or import a Salesforce list.' Below this is a table for manually inputting recipients, with columns for 'Email', 'Name', and 'Company'. The table has 4 rows, each with a checkbox in the first column. At the bottom of the table are 'ADD ROW' and 'ADD COLUMN' links. The page also includes a sidebar with navigation options like 'Campaign Name', 'Add Recipients', 'Touch 1', and 'Settings'. A blue arrow points to the 'UPLOAD .CSV FILE' button.

	Email	Name	Company
1 <input type="checkbox"/>			
2 <input type="checkbox"/>			
3 <input type="checkbox"/>			
4 <input type="checkbox"/>			

Note: Once you've saved a campaign, you'll still be able to add more recipients. You'll also be able to add recipients to a campaign directly from Salesforce, using a Contact or Lead list view or from an individual Contact or Lead record.

Here, you can set up an unlimited number of touches.
These touches will all be sent as automated emails:



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.

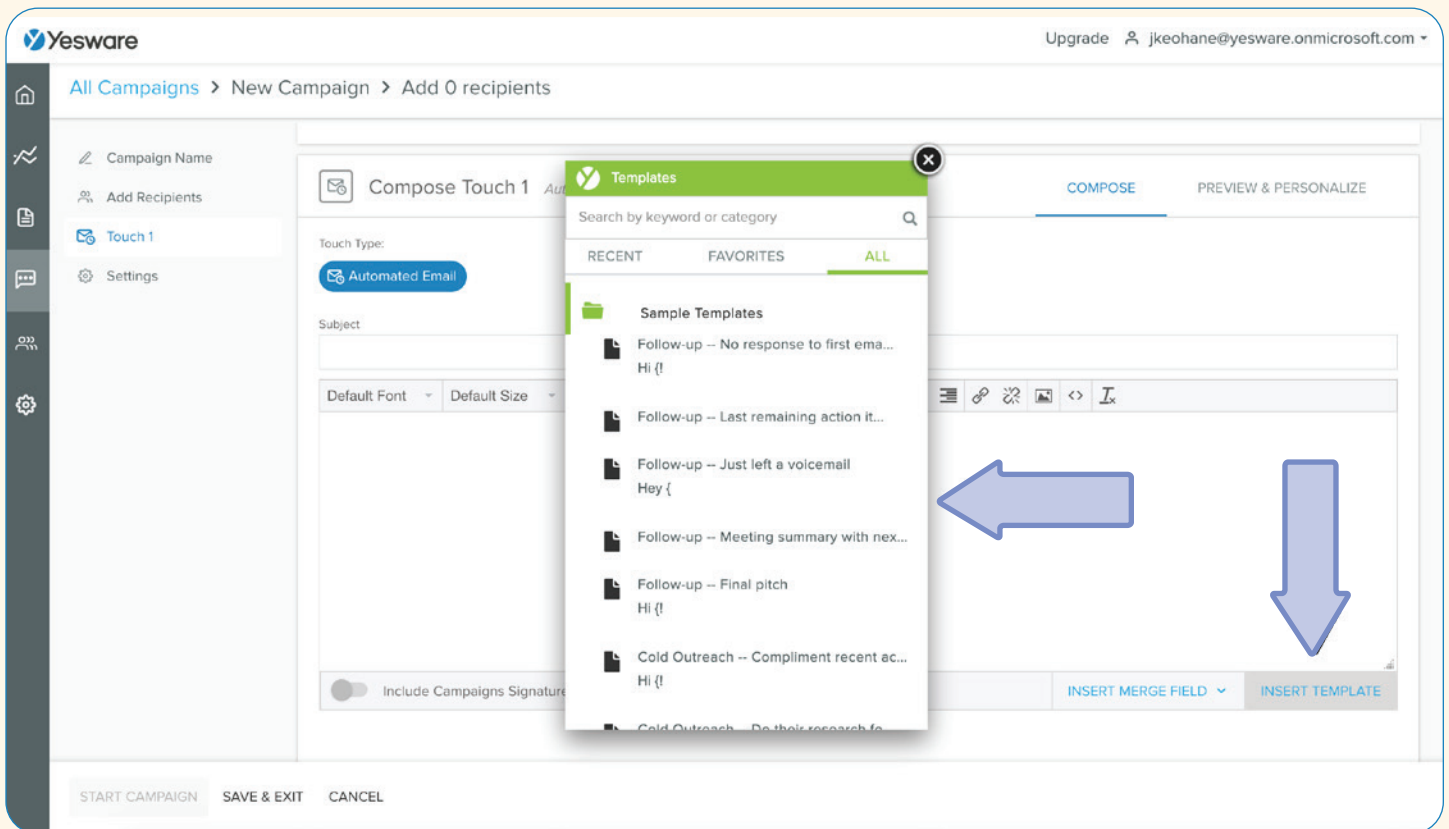
When it comes to composing the content of your campaign, it will save you tons of time inserting templates and merge fields. You can insert a template by clicking “Insert Template” at the bottom right of your message.

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.



The screenshot displays the Yesware CRM interface for creating a new campaign. The main window is titled 'Compose Touch 1' and includes fields for 'Touch Type' (set to 'Automated Email'), 'Subject', 'Default Font', and 'Default Size'. A 'Templates' modal is open, showing a search bar and a list of templates under the 'ALL' tab. The templates listed are:

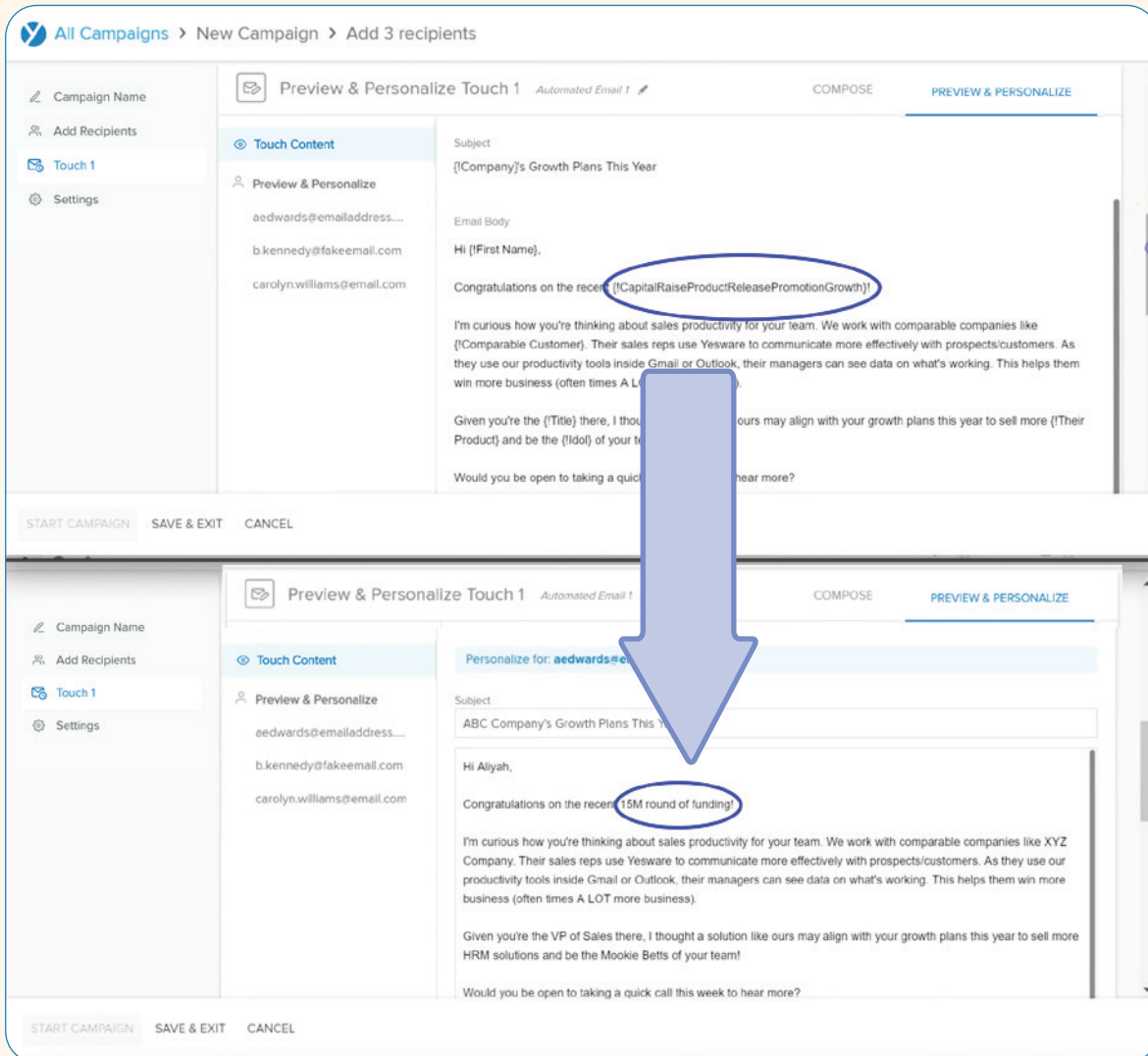
- Follow-up – No response to first ema...
Hi {
- Follow-up – Last remaining action it...
- Follow-up – Just left a voicemail
Hey {
- Follow-up – Meeting summary with nex...
- Follow-up – Final pitch
Hi {
- Cold Outreach – Compliment recent ac...
Hi {
- Cold Outreach – Do their research fo...

At the bottom of the modal, there are buttons for 'INSERT MERGE FIELD' and 'INSERT TEMPLATE'. A blue arrow points from the 'INSERT TEMPLATE' button to the modal, and another blue arrow points from the modal to the 'Compose Touch' form.



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.



The screenshot illustrates the 'Preview & Personalize' workflow in two stages. In the top stage, the email content is shown with merge fields like `{!Company}'s Growth Plans This Year` and `{!CapitalRaiseProductReleasePromotionGrowth}!`. A blue oval highlights the latter, and a large blue arrow points down to the bottom stage. In the bottom stage, the email is personalized for the recipient 'aedwards@emiladdress...', with the subject line 'ABC Company's Growth Plans This Year' and the body text updated to include 'Hi Aliyah,' and 'Congratulations on the recent 15M round of funding!'.

Choose the number of touches, timing between each touch, and whether you want the recipient to receive the touches after connections.

Before sending, make sure to view your campaign in “Preview & Personalize” to make sure everything looks good to you before clicking Start Campaign.

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.

TOUCHES	RECIPIENTS
<input type="checkbox"/>	temples (temples.evans@tattudot.com.au) PAUSED: OUT OF OFFICE 1 - 01/14/2020 2 - Paused 01/14/2020
<input type="checkbox"/>	David Angotti (davidangotti@gmail.com) COMPLETED 2 - 01/16/2020 - 01/14/2020
<input type="checkbox"/>	Chris Goh (chris_goh@dg.co.uk) REMOVED: OPTED OUT - - 01/14/2020
<input type="checkbox"/>	Jesse Stone (jess@pageuppeople.com) COMPLETED 2 - 01/16/2020 - 01/14/2020
<input type="checkbox"/>	Shawn Adams (shawn@buffcheck.com) COMPLETED 2 - 01/16/2020 - 01/14/2020
<input type="checkbox"/>	Karen Yee (karen@parkhealth.com) CONNECTED 1 - 01/14/2020 - 01/14/2020
<input type="checkbox"/>	VC Inc. Marketing (vcincmarketing@gmail.com) COMPLETED 2 - 01/16/2020 - 01/14/2020
<input type="checkbox"/>	Della Robinson (della.robinson@workiva.com) COMPLETED 2 - 01/16/2020 - 01/14/2020

[ADD RECIPIENTS](#) [EDIT CAMPAIGN](#) [RESCHEDULE NEXT TOUCH](#) [SKIP NEXT TOUCH](#) [REMOVE](#) [MOVE TO](#) [EXPORT](#)



Let's say that someone gives you a call in response to one of your automated emails, and you decide that they don't need to receive any of the remaining touches in that campaign. How would you go about removing them?

You can either use the search bar to search for the recipient or the specific campaign if you know which campaign they're on. Find the campaign and when you hover over it, some buttons will appear, click the "Manage Recipients" button.

The screenshot shows the Yesware 'Campaigns' dashboard. At the top, there's a search bar and a 'NEW CAMPAIGN' button. Below that, there are filters for 'ALL', 'CREATED BY ME', 'ALL SHARED', 'STARRED', and 'My Stats'. A table lists campaigns with columns for 'Campaign Details', 'Recipients/Touch', 'In Progress/Total Recipients', 'Open %', 'Click %', and 'Connect %'. The first row shows 'Sample Campaign' with 0/0 recipients, 0% open, and 0% click. A 'Manage Recipients' button is visible in the bottom right corner of the row, highlighted by a blue arrow.

Campaign Details	Recipients/Touch	In Progress/ Total Recipients	Open %	Click %	Connect %
Sample Campaign ☆ Sample Campaign by me	2d 5d	0 / 0	—%		Manage Recipients

From here, you can find the recipient, select them and click "Remove" in the bottom right corner.

From the Manage Recipients page, you can also reschedule touches, skip touches, or move a recipient to a different campaign.

The screenshot displays a web interface for managing a campaign. At the top, it shows 'All Campaigns > 04/29/2020 Campaign'. Below this, there are tabs for 'TOUCHES' and 'RECIPIENTS'. A notification indicates '1 Active Recipient'. A search bar is present with the text 'Search by name, email address, or domain'. A filter section is visible with 'Personal Details' selected. A table lists recipients, with one entry for 'jkeohane@yesware.com' marked as 'ACTIVE'. A confirmation dialog box is overlaid on the interface, containing the text: 'You are about to remove 1 recipient. Are you sure you want to remove jkeohane@yesware.com from this campaign?'. The dialog has two buttons: 'REMOVE THIS RECIPIENT' and 'CANCEL'. A blue arrow points from the 'REMOVE THIS RECIPIENT' button in the dialog to the 'REMOVE' button in the bottom navigation bar. Another blue arrow points from the 'REMOVE' button in the bottom navigation bar to the right side of the interface. The bottom navigation bar includes buttons for 'ADD RECIPIENTS', 'EDIT CAMPAIGN', 'RESCHEDULE NEXT TOUCH', 'SKIP NEXT TOUCH', 'REMOVE', 'MOVE TO', and 'EXPORT'.



In this area, you can also preview what your recipients are going to get and further personalize.

Let's say you learn some new information about a prospect and want to go in and add that to your future touches, in this Manage Recipients page, click on the recipient, and you can view all of the touches that are scheduled to be sent to this recipient.

Here, you can click into each individual touch to see what the recipient is going to get. If you want to change any messaging, click the "Personalize Touch" button on the touch you want to edit.

The screenshot displays the Yesware user interface. At the top left is the Yesware logo, and at the top right is the user profile 'jkeohane@yesware.onmicrosoft.com' with an 'Upgrade' link. The breadcrumb navigation shows 'All Campaigns > 04/29/2020 Campaign > All Recipients >'. Below this, a recipient card for 'jkeohane@yesware.com' is shown with an 'ACTIVE' status and 'Date Added: Today at 6:18 PM'. Underneath is a section for the '04/29/2020 CAMPAIGN' containing a 'Touch 1' with the subject 'Meeting Summary + Next Steps' and a scheduled time of '5/05/20 at 3:00 PM'. The email body text is visible, starting with 'Hi there,'. A 'PERSONALIZE TOUCH' button is located on the right side of the touch preview, with a blue arrow pointing to it. At the bottom left of the interface is a 'BACK TO ALL RECIPIENTS' link.

You can then edit your message accordingly.

In your Campaign Dashboard, you can make any necessary changes to your campaigns as needed, Yesware makes it easy.

The Campaigns Dashboard will also give you a sense of how your campaigns are performing - open %, click %, and connect %.

You can see this for both overall success rates of each campaign or even for individual touches.

The screenshot displays the Yesware Campaigns Dashboard. At the top, there is a search bar and a 'NEW CAMPAIGN' button. Below the search bar, there are filters for 'ALL', 'CREATED BY ME', 'ALL SHARED', 'STARRED', and 'My Stats'. The main content area shows a table with the following data:

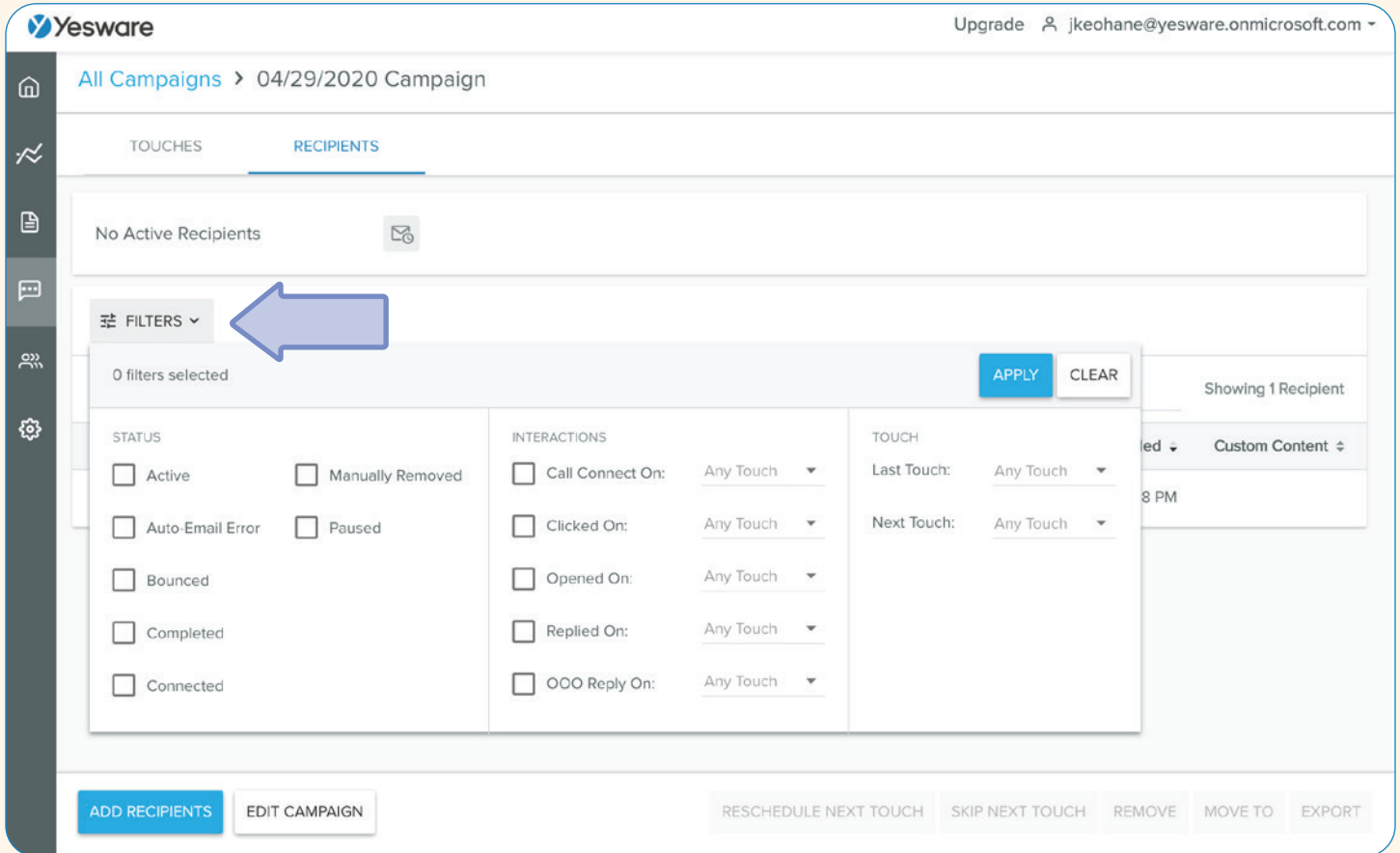
Campaign Details	Recipients/Touch	In Progress/ Total Recipients	Open %	Click %	Connect %
Demo Idol Campaign ☆ by me	5d 3d	2 / 3	0%	0%	0%
Sample Campaign ☆ Sample Campaign by me	2d 5d	0 / 0	—%	—%	—%

At the bottom of the dashboard, there is a footer that reads: 'Campaigns is a new feature. Help us improve, [share your feedback](#).'



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.



The screenshot displays the Yesware interface for a campaign titled "04/29/2020 Campaign". The "RECIPIENTS" tab is active, showing "No Active Recipients". A blue arrow points to the "FILTERS" dropdown menu, which is open. The filters panel includes:

- STATUS:** Active, Auto-Email Error, Bounced, Completed, Connected, Manually Removed, Paused.
- INTERACTIONS:** Call Connect On, Clicked On, Opened On, Replied On, OOO Reply On. Each interaction has a dropdown menu set to "Any Touch".
- TOUCH:** Last Touch, Next Touch. Each touch has a dropdown menu set to "Any Touch".

Buttons for "APPLY" and "CLEAR" are visible. Below the filters, there are buttons for "ADD RECIPIENTS", "EDIT CAMPAIGN", "RESCHEDULE NEXT TOUCH", "SKIP NEXT TOUCH", "REMOVE", "MOVE TO", and "EXPORT".

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](#).

Click “Generate my calendar link.” Here you can create customized display name, welcome message, and your own calendar link URL.

You can create custom meeting types depending on meeting length or agenda.

Yesware Upgrade jkeohane@yesware.onmicrosoft.com

Meeting Scheduler Settings

My Calendar Link [GENERATE LINK](#) [CANCEL](#)

This calendar link makes it easy for your recipient to view your availability in real-time and book their own meetings with you.

Your Display Name* [?](#)

Display Name

Welcome Message [?](#)

My Calendar Link URL* [?](#)

<https://meet.yesware.com/me/> url

Working Hours

Set your availability so people know what days and times you're available for meetings. Your timezone will be set as **America/New_York**.

<input type="checkbox"/> Sunday	9:00 am	to	5:00 pm
<input checked="" type="checkbox"/> Monday	9:00 am	to	5:00 pm
<input checked="" type="checkbox"/> Tuesday	9:00 am	to	5:00 pm
<input checked="" type="checkbox"/> Wednesday	9:00 am	to	5:00 pm

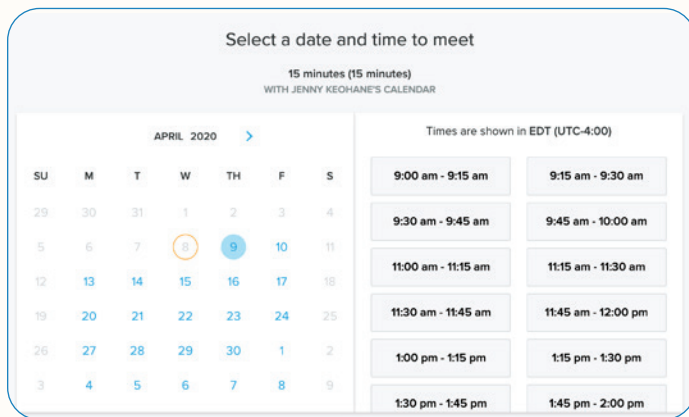
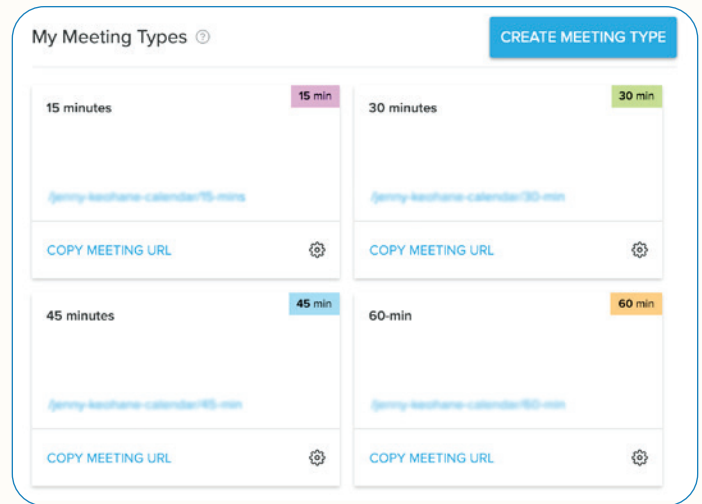
Tip:

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.

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

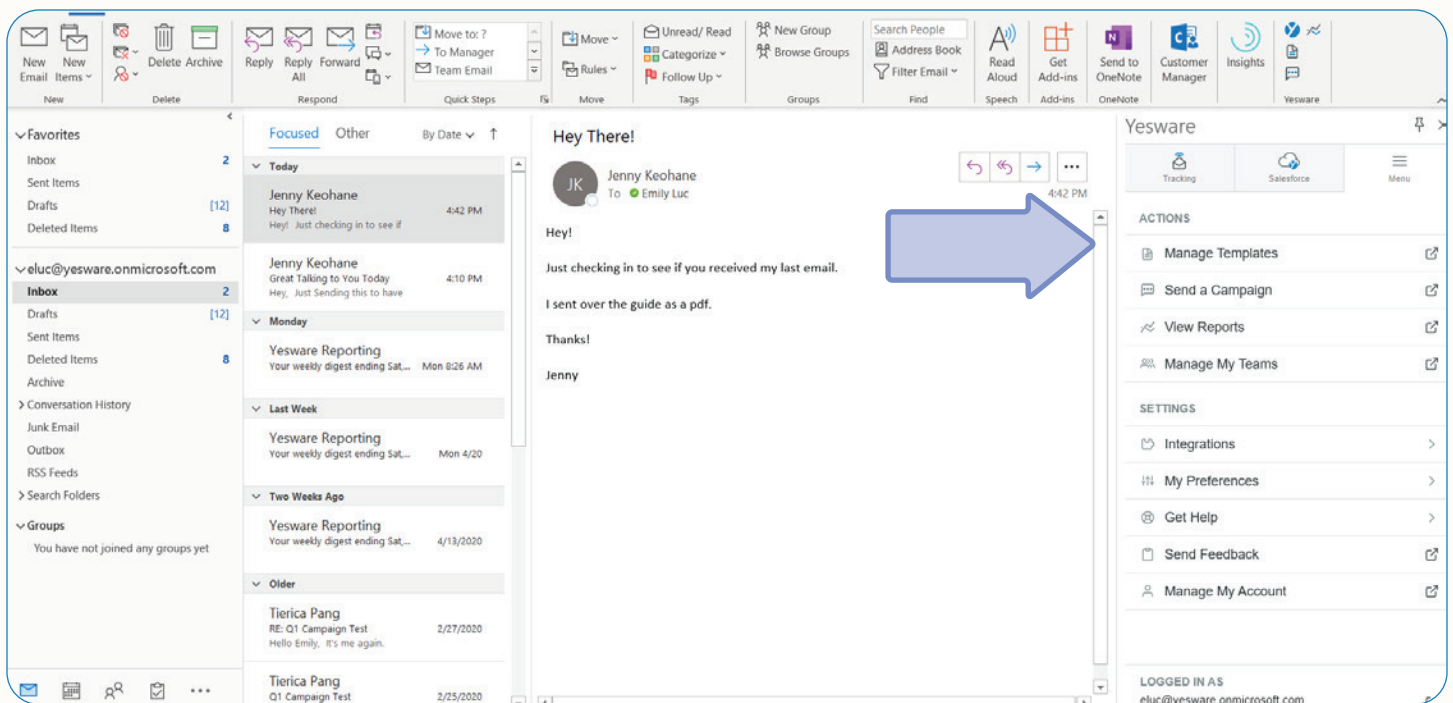
Templates

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 - in the menu section of the Yesware sidebar and then within a compose window, there's an "Add Template" button at the top right of your screen.

But first, we need to create these templates. To do that - in the Yesware sidebar, click "Manage Templates."



Let's head over to the Templates library.

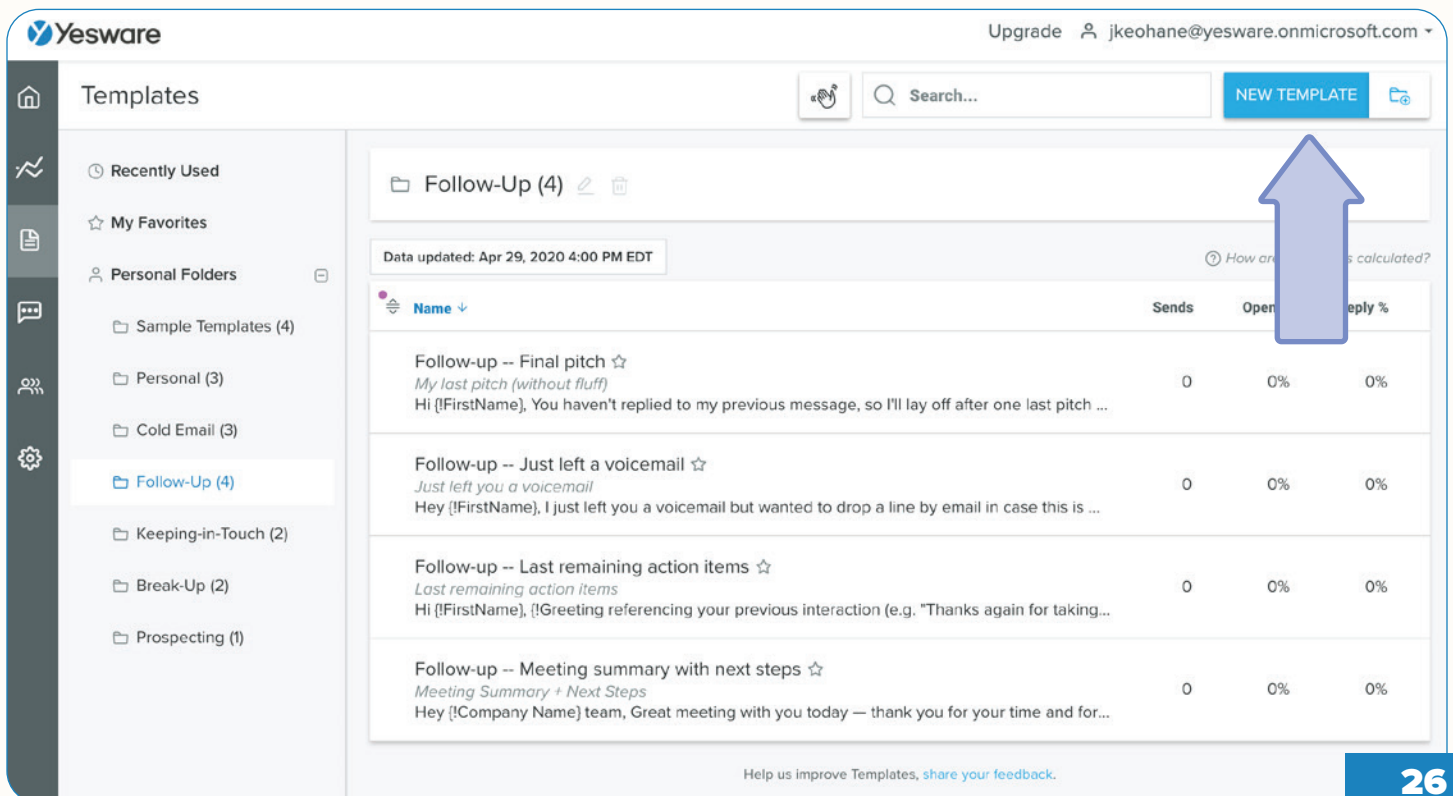
In your Templates library, the left side will have all of your personal and team templates as well as recently

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.



The screenshot shows the Yesware Templates library interface. At the top right, there is a 'NEW TEMPLATE' button. A blue arrow points to this button. The main content area displays a list of templates under the 'Follow-Up (4)' folder. The table below shows the details of these templates.

Name	Sends	Open	Reply %
Follow-up -- Final pitch ☆ <i>My last pitch (without fluff)</i> Hi {!FirstName}, You haven't replied to my previous message, so I'll lay off after one last pitch ...	0	0%	0%
Follow-up -- Just left a voicemail ☆ <i>Just left you a voicemail</i> Hey {!FirstName}, I just left you a voicemail but wanted to drop a line by email in case this is ...	0	0%	0%
Follow-up -- Last remaining action items ☆ <i>Last remaining action items</i> Hi {!FirstName}, {!Greeting} referencing your previous interaction (e.g. "Thanks again for taking...	0	0%	0%
Follow-up -- Meeting summary with next steps ☆ <i>Meeting Summary + Next Steps</i> Hey {!CompanyName} team, Great meeting with you today — thank you for your time and for...	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.

The screenshot displays the Yesware email template editor. On the left, a sidebar lists navigation options: 'Recently Used', 'My Favorites', 'Personal Folders' (with sub-folders like 'Sample Templates (4)', 'Personal (3)', 'Cold Email (3)', 'Follow-Up (4)', 'Keeping-in-Touch (2)', 'Break-Up (2)', and 'Prospecting (1)'), and a settings gear icon. The main workspace is titled 'Templates' and contains a form for creating a new template. The form includes fields for 'Template Name*' (Follow-up -- Just left a voicemail), 'Save in Folder*' (Follow-Up), and 'Subject' (Just left you a voicemail). The 'Body*' section contains a rich text editor with a toolbar and a preview of the email body text, which includes several merge fields like {!FirstName}, {!point of alignment between their company and yours}, and {!achieve desired re:}. A blue arrow points to the 'INSERT MERGE FIELD' button, which has a dropdown menu showing options: 'Text Field', 'Salesforce Field', and 'Dropdown Field'. At the bottom, there are buttons for 'SAVE TEMPLATE', 'CANCEL', and 'Response Insights'.

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.



Tip:

Insert attachments into your templates - this is super helpful for gauging the interest level of your recipients by whether they clicked on the attachment you sent them or quickly skimmed through your message.

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.

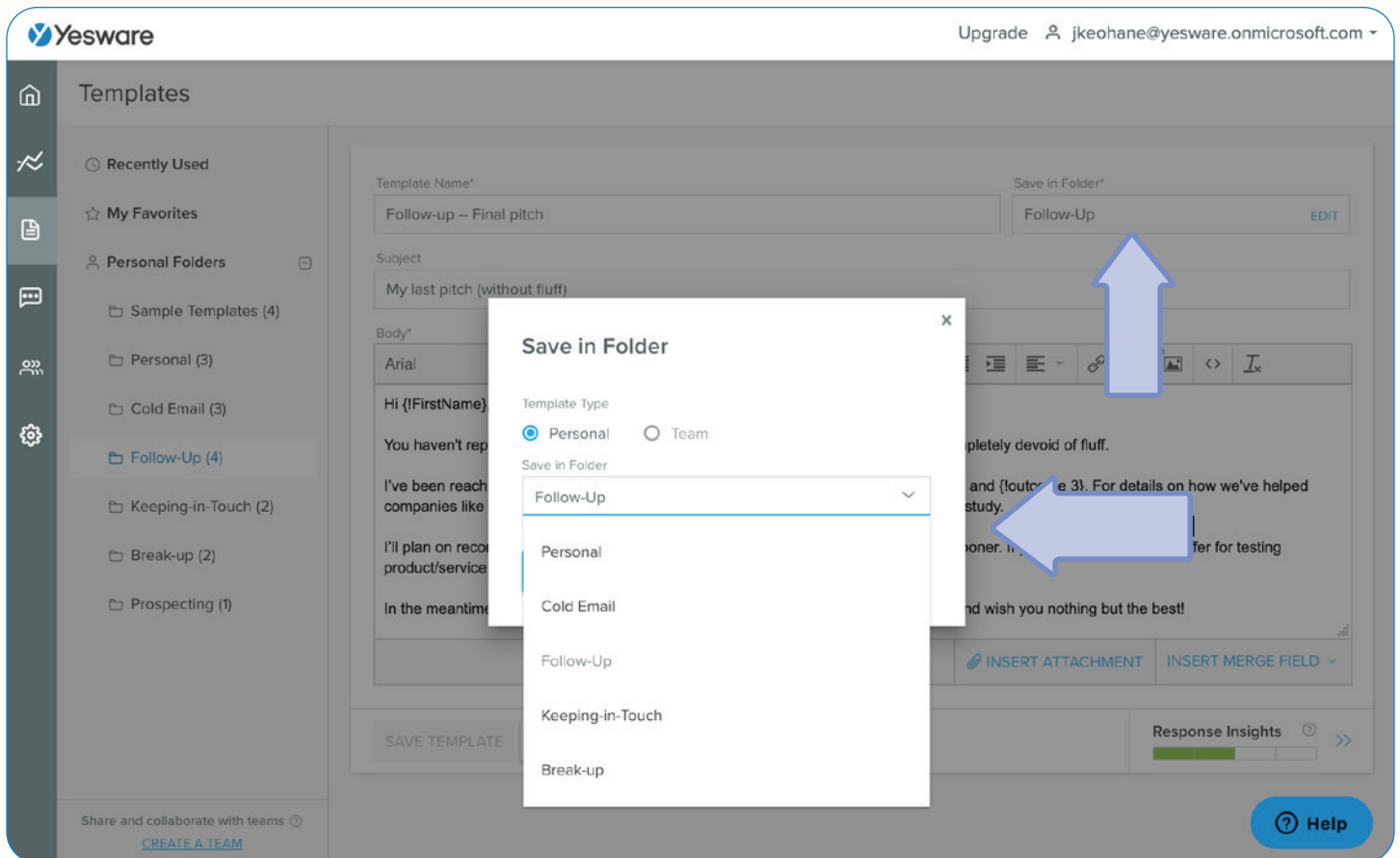
The Yesware's Response Insights feature at the bottom right of your window will also help you craft your message.

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).



The screenshot displays the Yesware email template editor. On the left, a sidebar lists various folders like 'Sample Templates', 'Personal', 'Cold Email', and 'Follow-Up'. The main editing area includes fields for 'Template Name' (Follow-up -- Just left a voicemail), 'Save in Folder' (Follow-Up), 'Subject' (Just left you a voicemail), and a rich text editor for the 'Body'. The body text is a draft email. On the right, the 'Response Insights - 4/4' panel shows metrics: Subject Length (5 words), Question Count (1), Grade Level (5.8), and Word Count (110). A 'Reading Time' of 0 mins, 32 secs is also shown. A 'SUBJECT LENGTH' tip states: 'An ideal subject line typically falls somewhere between 2-7 words. It should describe the contents of the message concisely and be short enough for the recipient to read it on their phone.' Two blue arrows point to the 'Response Insights' panel and the 'Body' text area.

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.

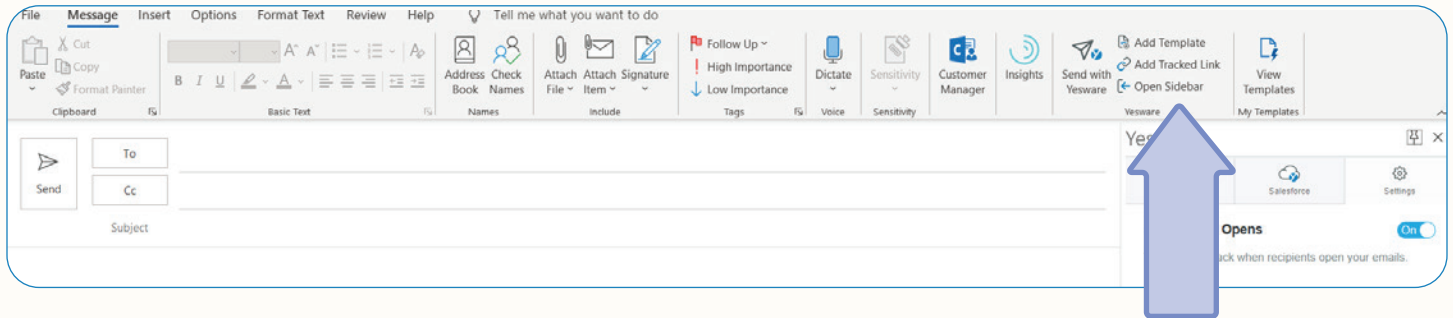
The screenshot shows the Yesware Templates dashboard. The left sidebar contains navigation options: Home, Recently Used, My Favorites, Personal Folders (Sample Templates (4), Personal (3), Cold Email (3), Follow-Up (4), Keeping-in-Touch (2), Break-Up (2), Prospecting (1)), and a 'Share and collaborate with teams' section with a 'CREATE A TEAM' link. The main content area displays a table of templates under the 'Personal (3)' folder. The table has columns for Name, Sends, Open %, and Reply %. Two blue arrows point to the Open % and Reply % columns. A 'NEW TEMPLATE' button is in the top right, and a 'Help' button is in the bottom right.

Name	Sends	Open %	Reply %
Compliment recent accomplishment ☆ <i>Congrats on [Recent accomplishment]</i> Hi [FirstName], Congratulations on [describe recent personal or company accomplishment]. I ho...	14	93%	79%
Do their research for them ☆ <i>Articles for your commute home</i> Hi [FirstName], The last few calls I've had with companies like yours who [specific stats about the...	5	80%	40%
Final pitch ☆ <i>My last pitch (without fluff)</i> Hi [FirstName], You haven't replied to my previous message, so I'll lay off after one last pitch that'...	9	33%	33%

Tip:

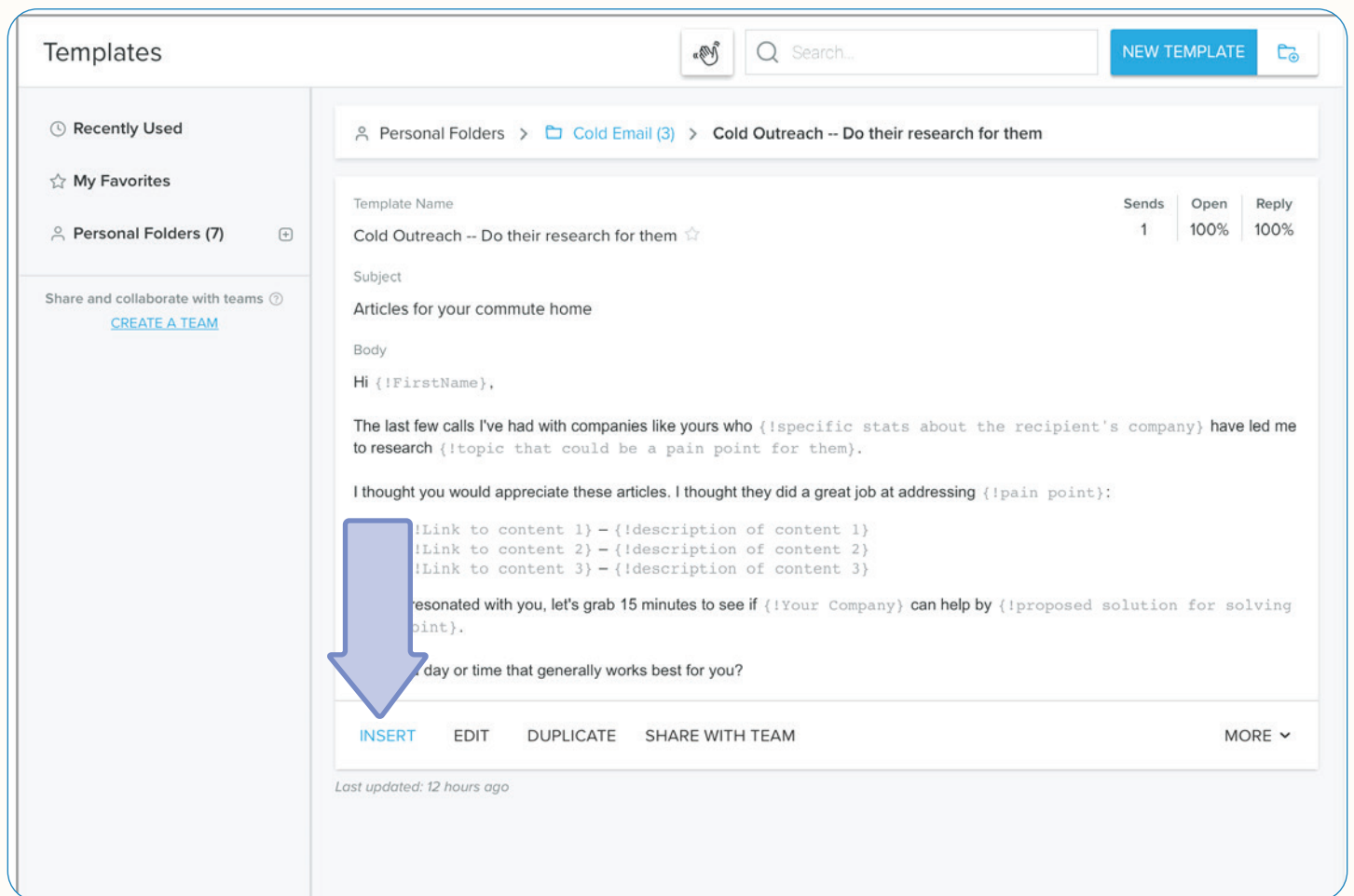
click on each % you want to see the top results for and the inbox will order the templates from the greatest % to least %. You can also custom sort your templates and folders - drag and drop your templates and folders in the order you want. Lastly, if you have templates you use more frequently than others, star those templates so they go into your favorites. The Templates dashboard helps you stay organized and move quickly through your inbox.

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



And now you can choose which template you'd like to use - all of your personal and team folders will be here.

When you find the template you want to use, click on the template, and either fill in the merge fields there and then click "Insert," or insert first and fill in the merge fields in your inbox.





Remember - you can still change any text you'd like. You can make any additions or adjustments to your message, or even insert another template into your email. Templates work with your workflow.

The screenshot shows an email client interface with a ribbon at the top containing various tools like Cut, Copy, Paste, Bold, Italic, Underline, and more. The message body contains the following text:

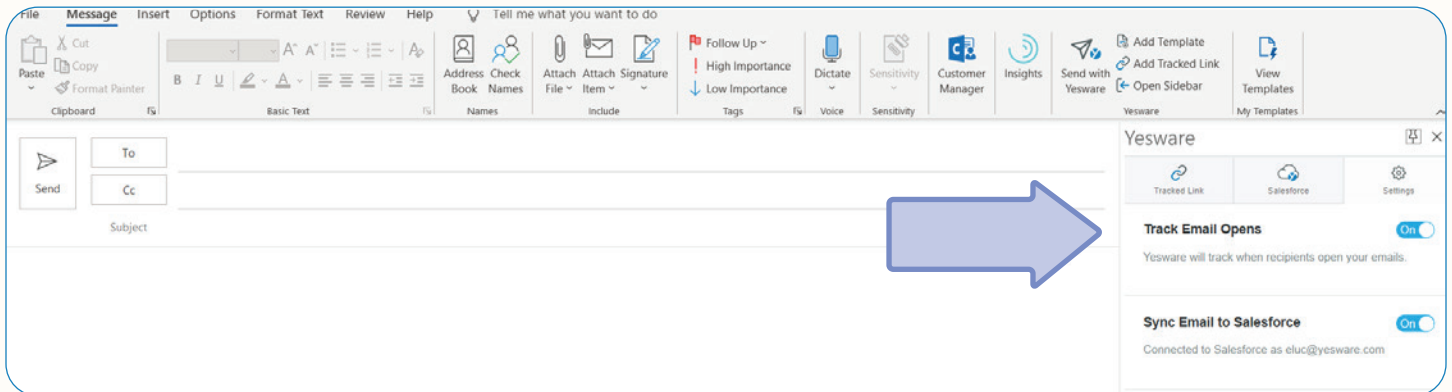
Hi **{FirstName}**,
Congratulations on **{Describe recent personal or company accomplishment}**. I hope you and your team are taking some time to celebrate the accomplishment.
I'm sure you're very busy, but I'd love to get your take on how **{My Company}** could **{solve a specific problem they're facing or provide a specific benefit they need}**.
Do you have 10 minutes sometime over the next couple weeks to chat? More than happy to work around your schedule or to try again at a more convenient time, just let me know.
All the best and congrats again!

If you want to see a full tutorial on setting up and using Templates - [visit Yesware U](#) - to watch free in-depth demo videos.

Email Tracking

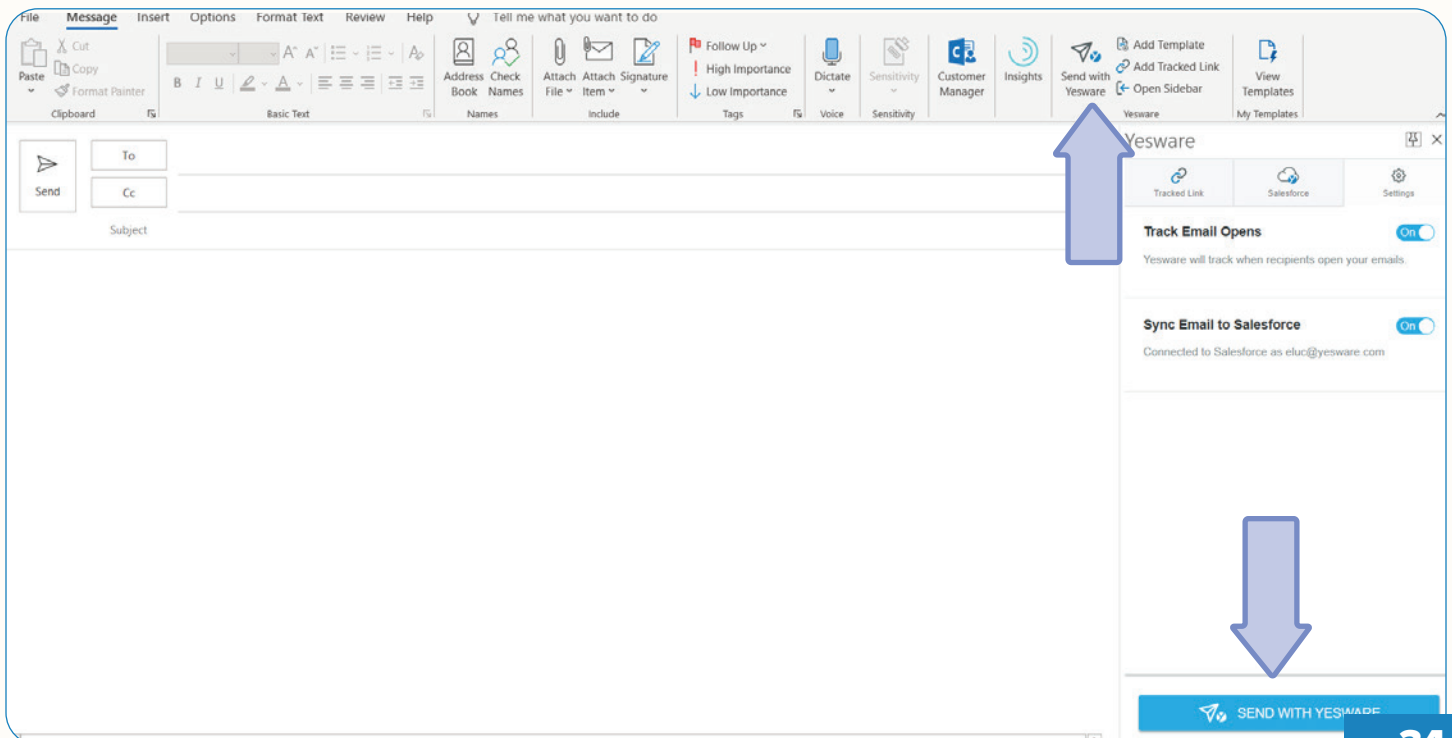
Email Tracking allows you to get real-time notifications for every email open, link click, and attachment view, view progress in your personal and team tracking report, and plan your next move based on your recipient's engagement.

To ensure your emails are getting tracked - when you open up a compose window, make sure in your email settings that "Track Email Opens" is toggled on.



And as long as you're hitting the "Send with Yesware" button (as opposed to using the Outlook "Send" button), this email will be tracked. You can click the "Send with Yesware" button at the top right of the Outlook ribbon, or at the bottom of your Yesware sidebar.

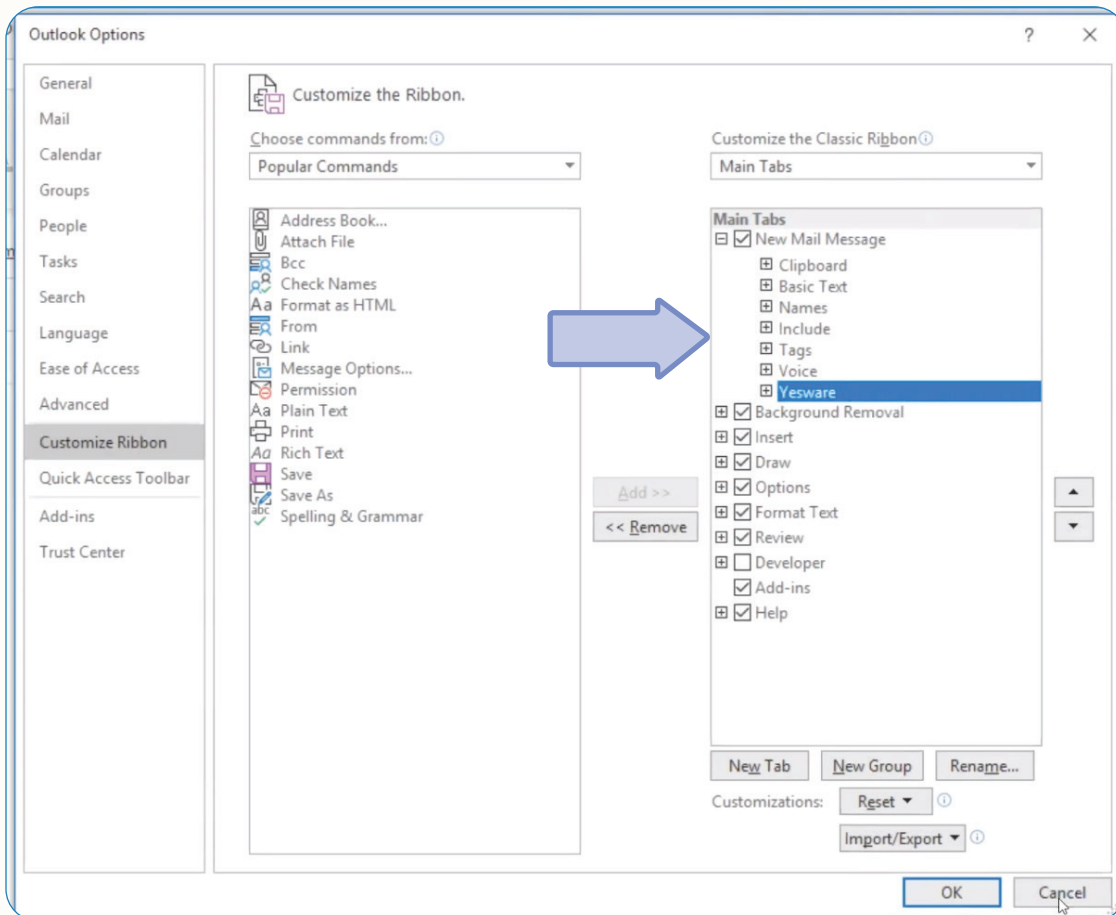
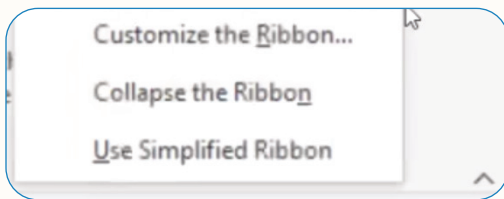
When you press Send With Yesware, the only difference is that we embed the invisible tracking pixel - your email won't look any different!



Tip:

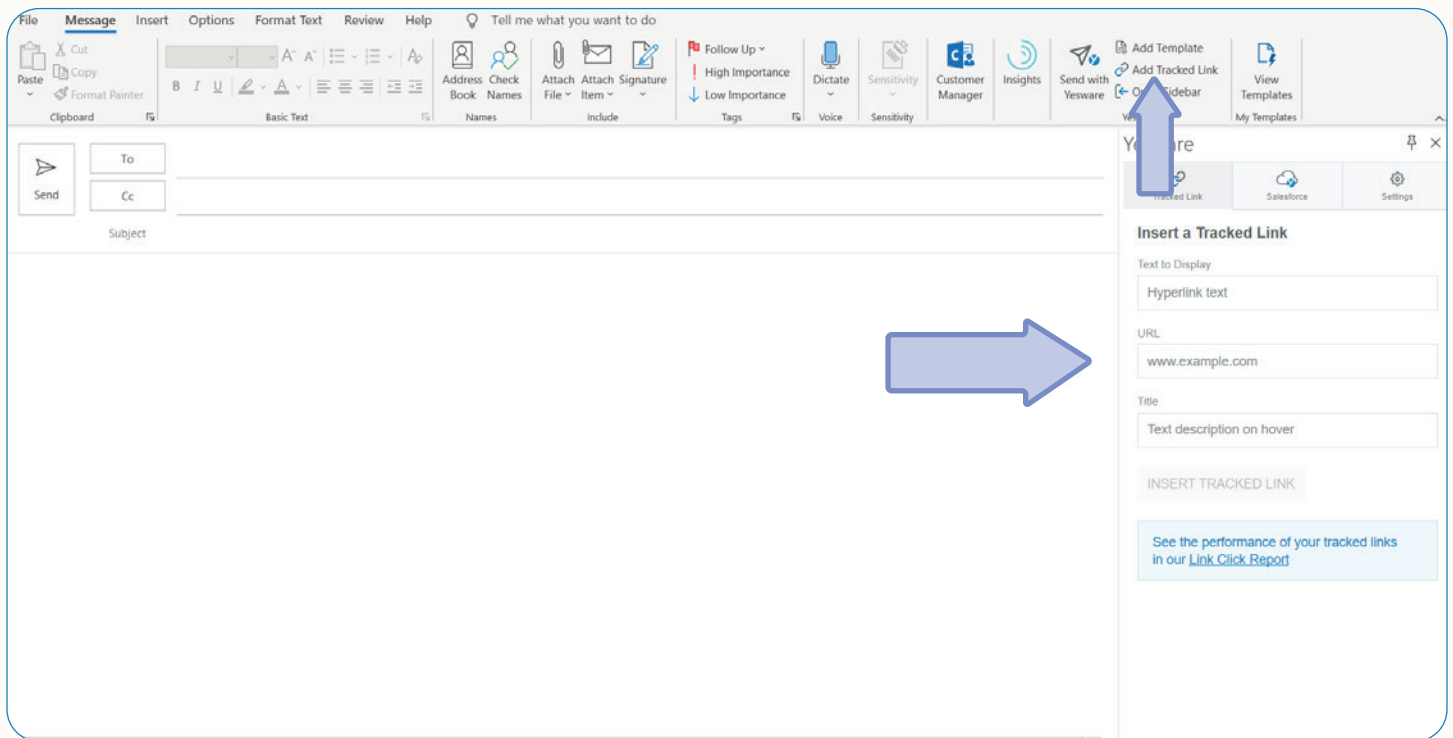
Days are busy and you're moving fast throughout your inbox so it can be helpful to have your Yesware sidebar pinned at all times. That way when you're sending a message, the "Send with Yesware" button is more in your face so you don't forget to send your emails with Yesware. Especially when you're just starting out and not in the habit yet.

Here's another recommendation: for PC users - you can actually rearrange the order of the buttons in the Outlook ribbon. If you right-click on the ribbon and click "Customize the Ribbon" - you can move Yesware in front of your clipboard so that all the Yesware related buttons are closer to the native send button.



Once you click Send with Yesware, your email will be tracked

To send a tracked link, click the “Add Tracked Link” button at the top right of your Outlook ribbon.



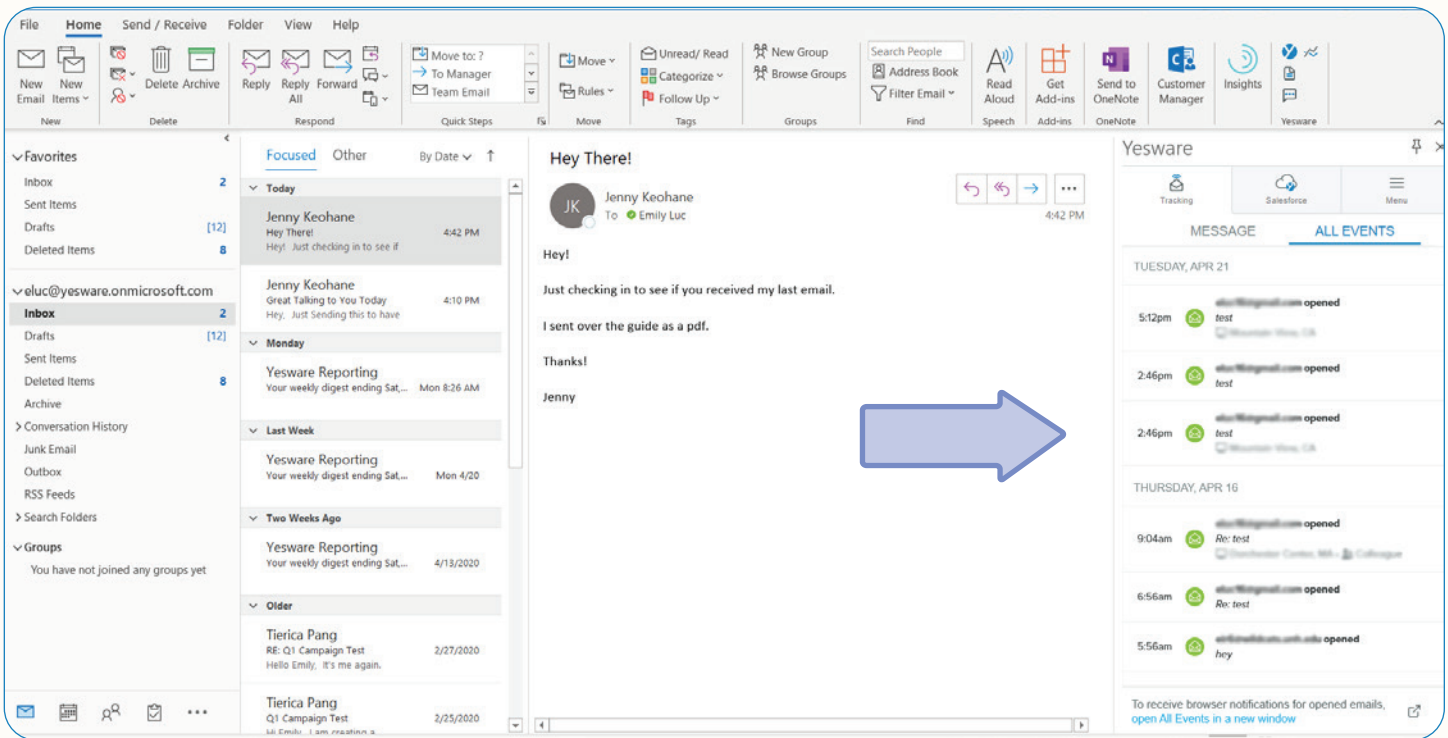
Tip:

In the text display, we highly recommend using a descriptive hyperlink - what we mean by that is writing out a word vs. writing out the full URL - this will reduce the chances of your email being flagged as spam by your recipient's email filters.



To view all tracked activity, in your Yesware sidebar under “All Events” - this sidebar will show you when your emails are opened, by who, what device was used to open the email, etc.

You can access these notifications in the Tracking tab in the Yesware sidebar (if it's not pinned, click on “Open Yesware” at the top right of your inbox). All tracking events appear under All Events and when you click on the Message tab, you'll be able to see the entire tracking history for a specific email on which you are clicked.



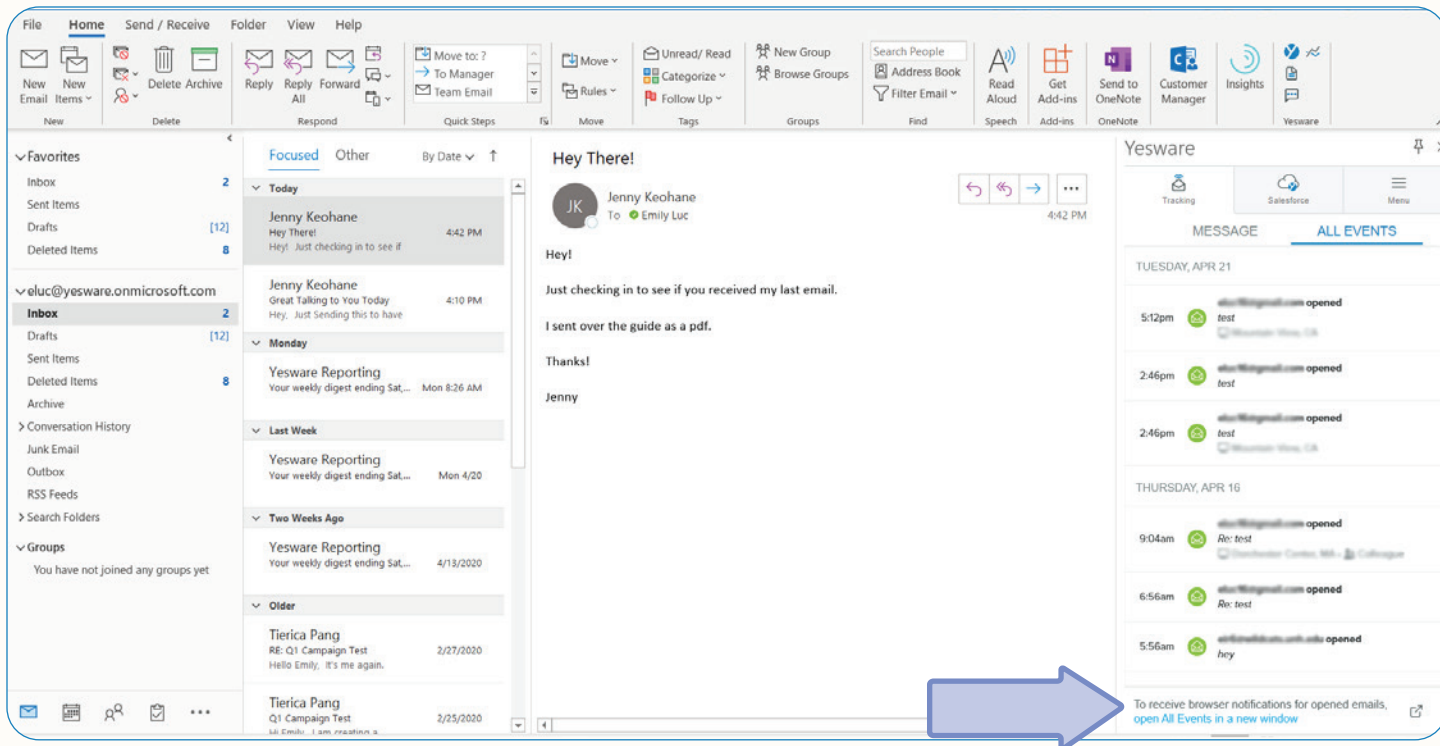
This will give you a sense of recipient's interest levels and allow you to act upon these engagements accordingly. This will help you plan your follow-ups and make decisions about what comes next.

Tip:

Use this information for deciding which recipients to prioritize over others. Recipients clicking your links are most likely more invested in your offering, rather than skimming your email and clicking out. We've heard great success from salespeople who use this as a call list - in the morning checking this list and calling recipients who have clicked on a link.

You can also get real-time notifications about these engagements so you can act on them fast. To enable pop up notifications, make sure you have “Event Notifications” turned on in your preferences.

Then, at the bottom of the Tracking feed, click the “To receive browser notifications for opened emails, open All Events in a new window.”



This will open up a browser window where you can allow for browser notifications, leave this window open in the background, and you'll get real-time notifications for email interactions to give you the information you need to follow-up effectively.

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.

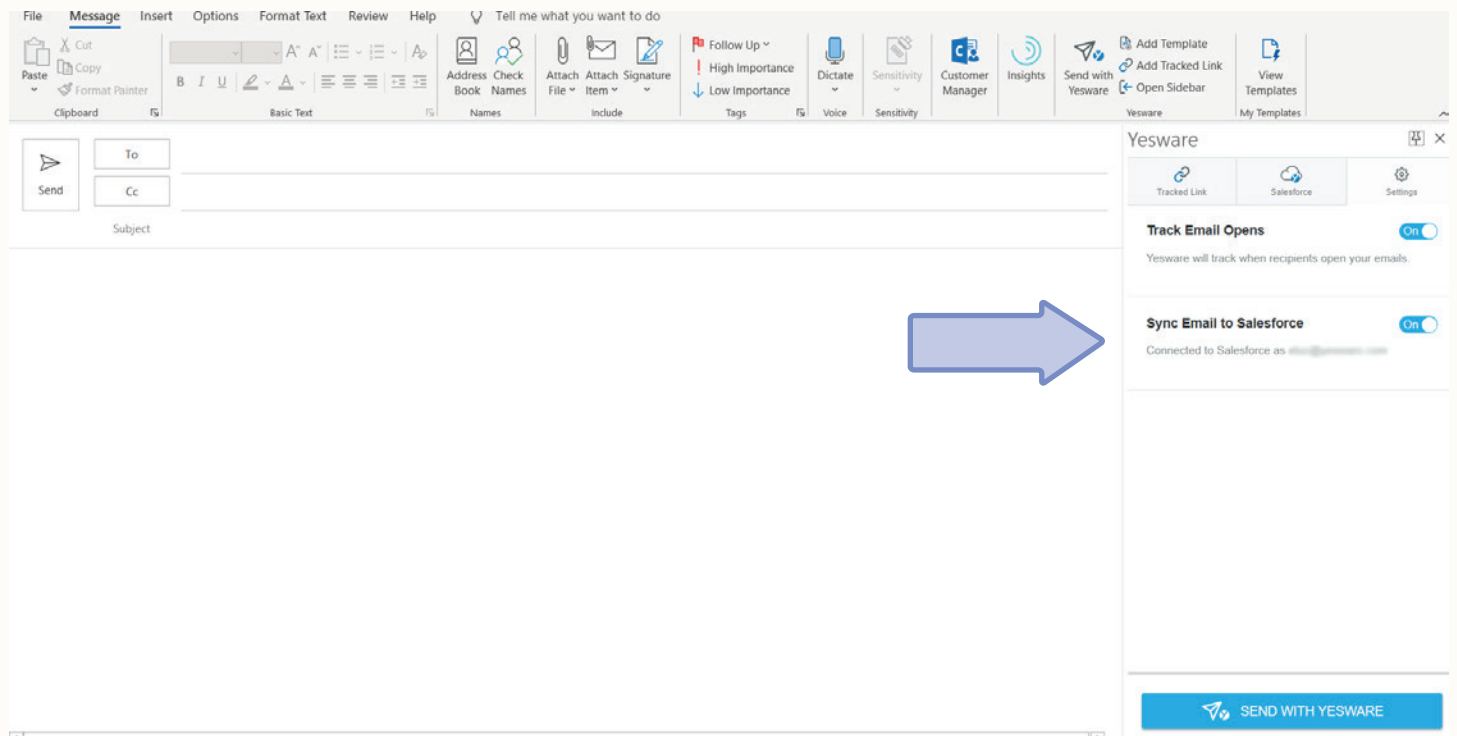
Syncing Activity to Salesforce

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.

To log an email to Salesforce using Yesware, when you open up a compose window and enter in your recipient's email address, in the email settings section on the top right of Outlook, make sure that "Sync Email to Salesforce" is toggled on, once that's toggled on, it's as easy as hitting the "Send with Yesware" button (either at the bottom of the email settings or at the top of the outlook ribbon).



And as long as the recipient that you put into the To field has a contact or lead record within your Salesforce environment, this email is going to automatically sync to Salesforce (body, subject line, engagement, etc).

In Salesforce, this will show up on the contact or lead page under Activity History.

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

Salesforce Sidebar

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 not 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.

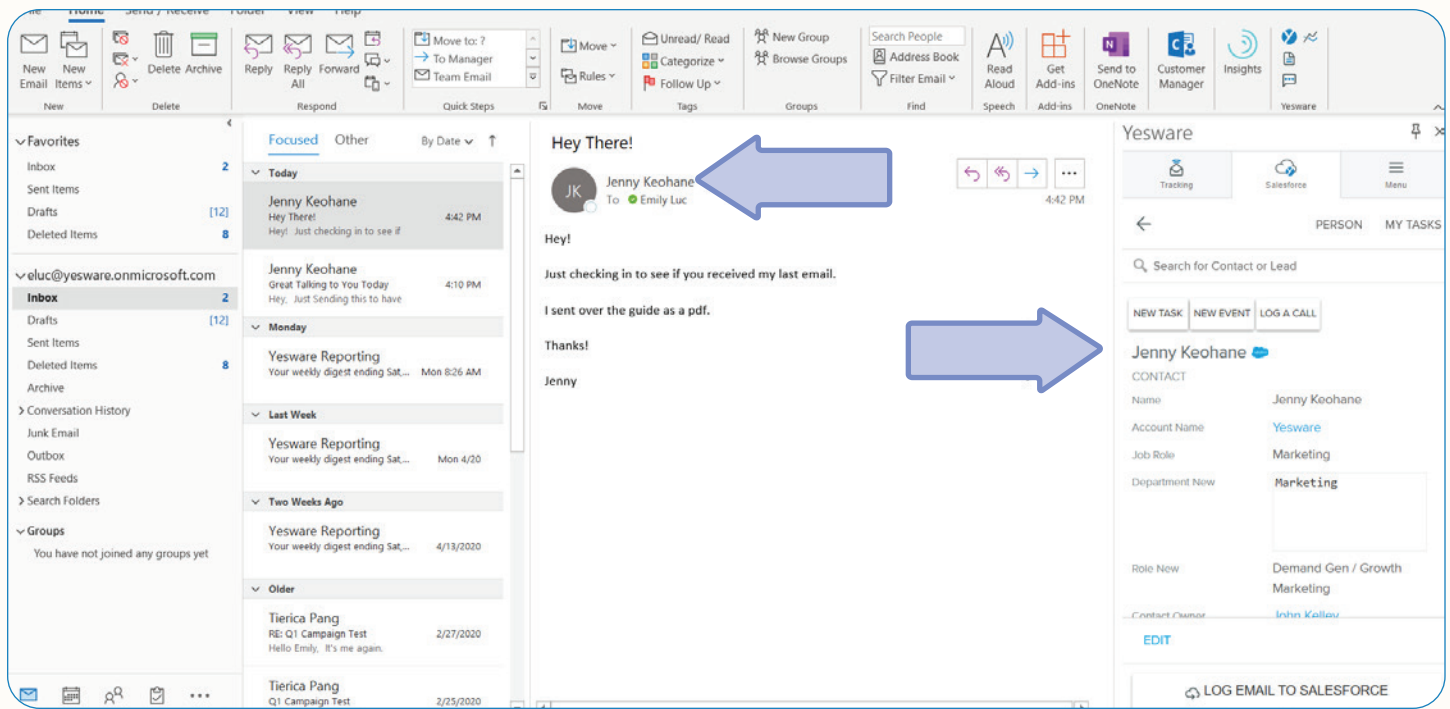
The screenshot shows an email client interface with a Salesforce sidebar. The sidebar is titled "Yesware" and displays contact information for "Beth Baymore-Demo". The contact details include:

- Name: Beth Baymore-Demo
- Account Name: [Baymore Enterprises](#)
- Title: Implementation & Training Manager
- Email: bbaymore@live.com
- Pardot Country in EU?: No
- Account: Possible EU C...: No

The email content is titled "Request for Training" and is from Bethany Baymore to Bethany Baymore. The email body says: "Hi Bethany, Do you have any time this week for a training? Best, Bethany".

The Salesforce sidebar displays your history with your contact while you're viewing an email. You can click into each one of the tasks to view your activity history.

Not only can you see the past, but you can also create future tasks directly from the sidebar.



Tip:

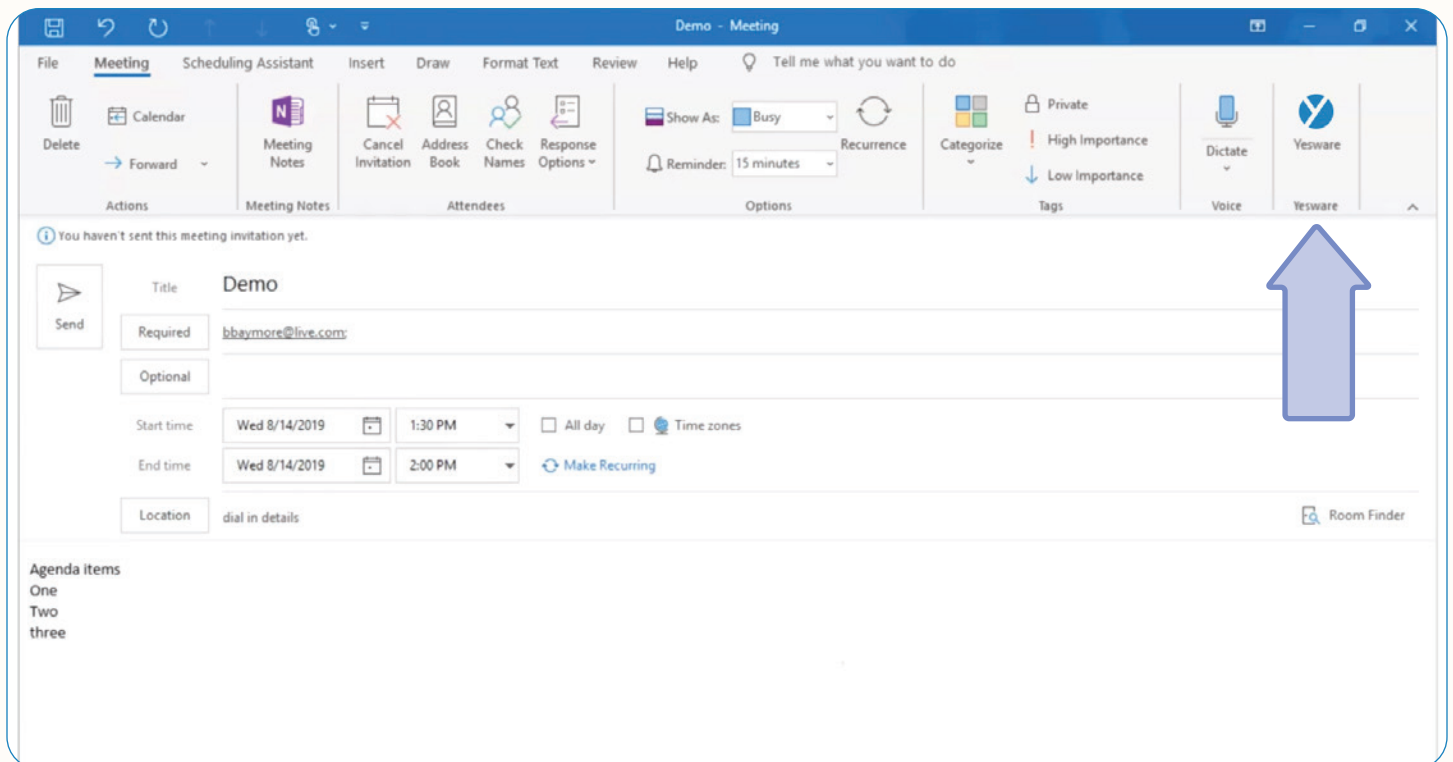
Let's say you get an email from an existing contact or lead informing you that their number has changed - the sidebar is right there to make the changes. Always make sure your information is up to date and use the sidebar to make all changes without leaving your inbox.



Calendar Sync

Tired of manually updating your Salesforce calendar every time you schedule a meeting? Yesware syncs your newly-created Outlook events and event updates to Salesforce within a matter of minutes.

To use Yesware's Calendar Sync in O365, open up a new meeting and invite others by click "Invite Attendees." Then, select the Yesware logo in the Outlook ribbon. This will open up Yesware's sidebar within the meeting invite. As long as the "Salesforce Sync" is toggled on, it will include a unique Salesforce sync address in your list of attendees.



When you send the invitation, this meeting will sync as an open activity to the first recipient on the invitation with a Contact or Lead record.

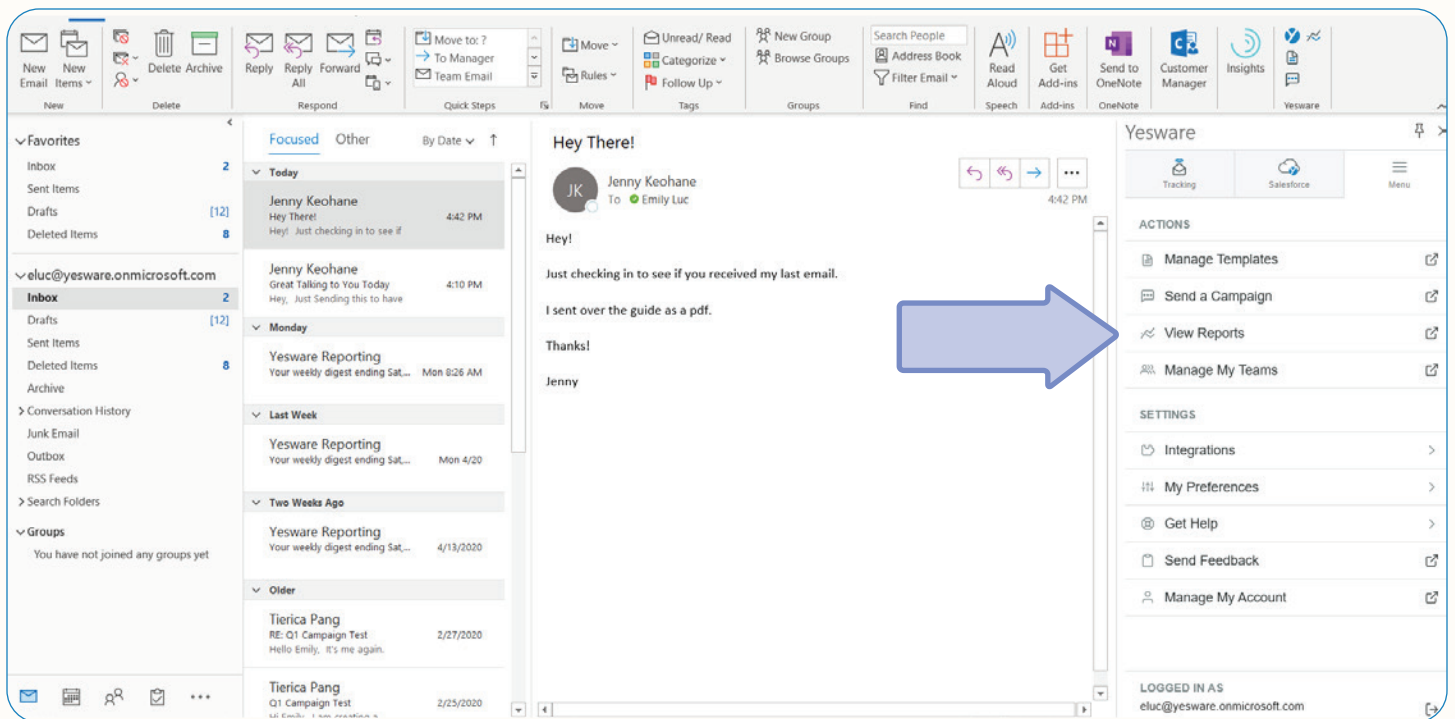
This will sync to Salesforce as an Event in the Open Events until the date and time has come and gone, and it will then appear in the Activity History.

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 "View Reports" in the Yesware sidebar.



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, and more.

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).



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

The screenshot shows the Yesware Email Activity Report interface. The top navigation bar includes the Yesware logo, an 'Upgrade' button, and the user's email address 'jkeohane@yesware.onmicrosoft.com'. The sidebar on the left lists various report categories, with 'Email Activity' highlighted. The main content area is titled 'Email Activity' and includes a search bar, a 'DOWNLOAD REPORT' button, and several filter options: 'Reporting period' (Last 7 days), 'Filter users by' (No Teams Available), 'Advanced filters' (None Selected), and 'Sort by' (User). Below these filters is a summary table showing performance metrics for 'You vs Team Average' and 'All Teams (avg)'. A 'Data updated' timestamp and user count are also present. The bottom section is a detailed table of individual user performance.

You vs Team Average	Emails Sent	Emails Tracked	Open %	Reply %
Jenny Keohane	10	10	90%	50%
All Teams (avg)	30	29	77%	39%

User	Emails Sent	Emails Tracked	Open %	Reply %
Doug Ellinger New Sample Templates	0	0	--	--
Ian Adams Account Executives, New Sample Templates	23	23	83%	52%
Inessa Lurye New Sample Templates	6	3	67%	0%
Jennifer Sullivan Account Executives	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).

The screenshot shows the Yesware 'Templates by User' report interface. The top navigation bar includes the Yesware logo, an 'Upgrade' button, and the user's email address 'jkeohane@yesware.onmicrosoft.com'. The sidebar on the left lists various report categories, with 'Templates by User' selected. The main content area features a search bar, a 'DOWNLOAD REPORT' button, and filter options for 'Reporting period' (Last 7 days), 'Filter users and data by' (No Teams Available), 'Advanced filters' (None Selected), and 'Sort by' (User). A summary table compares 'You vs Team Average' for Jenny Keohane (0 templates used, 0 tracked, 0% open, 0% reply) against 'All Teams (avg)' (3 templates used, 11 tracked, 60% open, 24% reply). Below this, a table lists individual users with their respective template usage and performance metrics.

User	Templates Used	Templates Tracked	Open %	Reply %
Jenny Keohane	0	0	--	--
All Teams (avg)	3	11	60%	24%

User	Templates Used	Templates Tracked	Open %	Reply %
John Kelley <small>Account Executives</small>	11	35	74%	31%
Sarah Freshman <small>Account Executives</small>	11	59	53%	20%
Inessa Lurye <small>New Sample Templates</small>	1	2	50%	0%
Ian Adams <small>Account Executives, New Sample Templates</small>	0	0	--	--

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.

The screenshot shows the Yesware interface for the 'Templates by Template' report. At the top, there's a search bar and a 'DOWNLOAD REPORT' button. Below that, filters for 'Reporting period' (Last 7 days), 'Filter users and data by' (No Teams Available), 'Advanced filters' (None Selected), and 'Sort by' (Template) are visible. A summary table shows:

Template Performance	Total Unique Templates	Total Templates Tracked	Open %	Reply %
All Templates	17	65	74%	32%

Data updated: Apr 29, 2020 6:00 PM EDT. 11 - 17 of 17 templates.

Template	Users	Templates Tracked	Open %	Reply %
Pilot User Request for Feedback (short pilot) <small>Account Executives > Pilots</small>	1	8	63%	13%
Proposed Time for Call <small>Account Executives > Inbounds</small>	2	11	73%	64%
Quick Quote with Order Form Details <small>Account Executives > Quotes</small>	2	12	75%	42%
Request for Order Form Information <small>Account Executives > Order Forms</small>	2	3	100%	33%
ROI Calculator with Quote <small>Account Executives > Quotes</small>	1	1	100%	0%

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

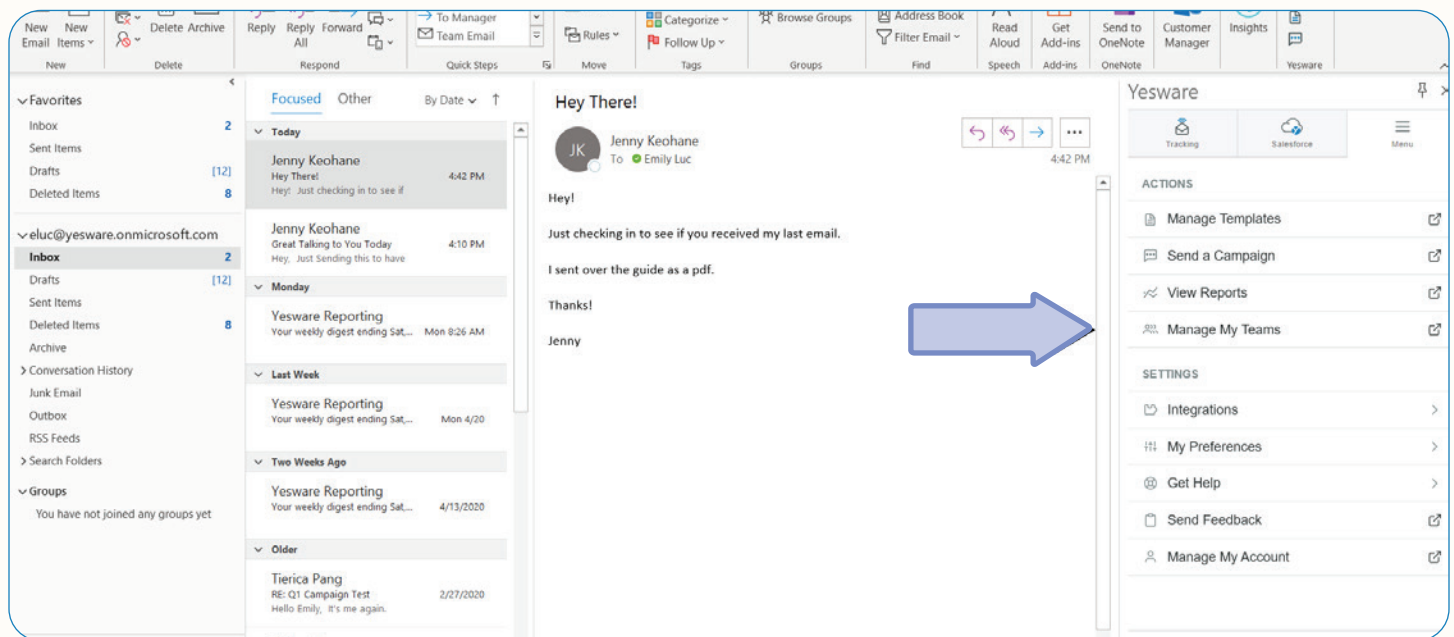
Teams

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.

In the Yesware sidebar, click “Manage My Teams” to access and edit teams.



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.

The screenshot shows the Yesware interface for a campaign named "Sample Campaign". The "TOUCHES" tab is active. The campaign name is "Sample Campaign". There are three touchpoints:

- Touch 1:** "Follow up after me...". Metrics: 0% REPLY RATE, 0% OPEN RATE, 0% CLICK RATE, 0 REPLIED, 0 SCHEDULED, 0 DELIVERED, 0 SKIPPED.
- Touch 2:** "Validate your soluti...". Metrics: 0% REPLY RATE, 0% OPEN RATE, 0% CLICK RATE, 0 REPLIED, 0 SCHEDULED, 0 DELIVERED, 0 SKIPPED.
- Touch 3:** "The breakup (leave...". Metrics: 0% REPLY RATE, 0% OPEN RATE, 0% CLICK RATE, 0 REPLIED, 0 SCHEDULED, 0 DELIVERED, 0 SKIPPED.

Transitions: "After 2 business days, if there is no connection, start Touch 2." and "After 5 business days, if there is no connection, start Touch 3." A blue arrow points to the "SHARE" button in the bottom right corner of the interface. Other buttons include "ADD RECIPIENTS", "EDIT CAMPAIGN", "Campaign Not Shared", "DUPLICATE", and "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.”

The screenshot shows the Yesware Templates interface. On the left is a sidebar with navigation options: Home, Recently Used, My Favorites, Personal Folders (Sample Templates (4), Personal (3), Cold Email (3), Follow-Up (4), Keeping-in-Touch (2), Break-Up (2), Prospecting (1)), and a footer with 'Share and collaborate with teams' and 'CREATE A TEAM'. The main area displays a template titled 'Do their research for them' with a breadcrumb path 'Personal Folders > Personal (3) > Do their research for them'. The template content includes a subject 'Articles for your commute home' and a body with personalized text and a bulleted list of links. At the bottom of the template editor, there are buttons for 'EDIT', 'DUPLICATE', 'SHARE WITH TEAM', and 'MORE'. A blue arrow points to the 'SHARE WITH TEAM' button. The interface also includes a search bar, a 'NEW TEMPLATE' button, and a 'Help' button in the bottom right corner.

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](#).

