The Complete Checklist For Your

Drip Campaign Tool Search

NO

NO

REPLY?

REPLY?

YES

YES

When you're planning to launch a sales drip campaign, you want to make sure you have all the right features at your disposal. Keep this checklist handy when looking for a tool to choose:

	YES	NO	YESWARE
Can I send a mass email from my company's email server (without added step)?			✓
Can I send to over 150 people at a time?			✓
Can I include multiple stages to a mass email?			✓
Can I build a drip campaign (multi-stage mass email) directly within my email client?			✓
Can I set conditional filters based on engagement for each stage of my drip campaign (i.e. "send next stage in 3 days if no reply")?			✓
In a multi-stage campaign, can I set up each email to send as a reply, so that recipients see the initial email and entire message history?			✓
Can I import a recipient list from my CRM right into my drip campaign set-up?			✓

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	YES	NO	YESWARE
Alternatively, can I upload contacts via a .csv file?	☐	☐	✅
Can I add a CC or BCC?	☐	☐	✅
Are there rich formatting options for my email content?	☐	☐	✅
Can I preview each stage of my drip campaign? And edit the recipient list and/or message preview?	☐	☐	✅
Can I track clicks on URLs within my emails?	☐	☐	✅
Can I access real-time analytics showing me opens, clicks, replies, and bounces?	☐	☐	✅
Can I sync my email campaign to report engagement back to CRM automatically?	☐	☐	✅
Can I manually remove people from my campaign after a stage sends, but before the next stage?	☐	☐	✅
Can I save my campaign as a template for future use?	☐	☐	✅
For templates, can I edit individual messages within each stage?	☐	☐	✅
Can I limit inexperienced team members from using this functionality?	☐	☐	✅

Yesware *Sell Smarter.*

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"My team sends a high volume of outbound emails each day. The engagement insights we get from Yesware are invaluable. We're making qualified decisions based on analytics and data, rather than hypothesis and guesswork...

It's shortened our sales cycle by at least 20%.*"*

Tim Bertrand
VP, Worldwide Sales
ACQUIA

Nate Castro
Director, Enterprise Sales
GA GENERAL ASSEMBLY

Dominic Garabedian
VP, Sales
mimeo.com

Contact sales@yesware.com to get started today so you can:

See who opens your emails (in real-time), clicks on links, and forwards your email

Schedule emails to be sent later, when they're more effective

Place calls from your inbox with one click, and auto-log call and notes to Salesforce

Set up email drip campaigns to keep prospects engaged and never miss a follow-up

Get started today at yesware.com.