

Guidelines for Outlook

It is recommended that Outlook, if possible, is only used for sending and receiving emails, along with using the Calendar for timed appointments and activities. Many CRMs sync with Microsoft Outlook making it easy to use both and ensuring each is a carbon copy of the other.



Establish a Simple Set of Email Rules

When you put someone in the “To” field and send an email, the expectation is this information is important to them, and it may be an important Call to Action. They of course should reply that the email has been received and are working on it. In that way you know they received it.

When you put someone in the “Cc” field it is an FYI notification only and not a Call to Action. Therefore, nobody receiving a cc should ever reply unless they have something significant that directly impacts the correspondence at hand. It can be distracting to receive a series of ‘reply all’ emails that are simply ‘thank you’ and ‘sounds great’ to add to your already overflowing Inbox.

Email Signatures

It’s important there is a standard, compliance approved email signature and all team members are using it consistently.

Emails & Your CRM

We highly recommend **all client-specific emails coming in or going out** are also saved directly to your CRM. This of course assumes your CRM can provide full email integration.

A few things about Email Integration with your CRM:

- You will have to install an add on to allow the Outlook Integration with your CRM. These are typically easy to come by, and tutorials are always available
- Set up your system so it automatically saves anything ‘to and from’ that email address OR selectively add and save by clicking on the Outlook Plug
- Client email address must be in your CRM to be recognized and linked through both these options
- Emails can be automatically saved as the Subject of the Email (though this can be changed if desired)
- Have it default to save any attachments
- Emails are housed in the “Documents” or “Files” Tab depending on the CRM you are using