Turbo-charge customer communications with Email templates

Abstract
Make your sales reps more productive, enforce your corporate look-and-feel, and ensure your messaging is always consistent and on point.

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Following up with an Email after meeting a prospect or customer is a basic courtesy—and a welcome chance to reinforce important points and keep the communication channel open. Of course, some reps are better at writing than others, and some would rather not write at all.

With Email templates, you can make sure *all* your reps have high-quality, consistent responses to various situations at their fingertips. When reps use Email templates with the Salesforce CRM Mass Email capabilities, they can easily communicate with their entire customer base. In addition, product managers can use Email templates to communicate about new products and features, and marketing users can promote regional customer events and invite prospects to events such as Webinars. There's also a built-in dynamic tracking feature that lets you track which Emails were opened, how many times, and when each recipient last opened the Email. And finally, Email templates reinforce your corporate look-and-feel and ensure that the messaging in all your communications is accurate and up to date.

You can create professional, high-impact HTML templates even without knowing HTML. *With* HTML expertise, you can create exactly the kind of Email you want. And with the pages functionality of Force.com, you can even merge fields from multiple records or objects in the Email.

Make the most of Email templates

To help get the most from Email templates:

- Know the pros and cons of different types of templates
- Ensure a consistent look-and-feel
- Leverage mass Email for targeted communications
- Take advantage of tracking
- Protect templates from being changed by users
- Consider partner products for Email marketing campaigns
- Keep templates organized

For detailed instructions on how to create Email templates, go to Help & Training.

Choose your templates

Salesforce.com provides four types of Email templates: text, HTML with letterhead, custom HTML, and pages (Visualforce).

The table below summarizes the advantages and disadvantages of each template type.

Type of template	Pros	Cons
Text	Does not require Edit HTML permission Requires no HTML knowledge Few/no issues with Email filters	No tracking for mass Emails No customization or corporate branding No visual elements
HTML with letterhead	Tracking Consistent branding across organization Quick add targeted messaging	Requires Edit HTML permission Requires letterhead setup Limited customization May get caught in Email filters
Custom HTML	Tracking Consistent branding across organization Fully customizable; you get exactly what you want	Requires Edit HTML permission Requires HTML knowledge May get caught in Email filters
Pages (Visualforce)	Makes it possible to merge fields from multiple records or objects	Requires Visualforce/Force.com code experience Not available for mass Emailing

Best practice

Ensure a consistent look and feel

You can ensure a consistent look and feel by creating a single letterhead to serve as the basis of all your HTML Email templates. Your letterhead can define the following attributes of the header and footer of your HTML Emails: Background color, header properties (including logo), a top line, body colors, a middle line, footer properties, and a bottom line. The template itself determines the format of the Email's main body. If your corporate identity changes frequently, simply changing your letterhead automatically changes all HTML templates based on the letterhead.

Tip: Keep the number of letterheads to a minimum. Multiple letterheads are useful for companies with multiple divisions that use different corporate brands or companies with logos in different languages. Most companies just need a single letterhead, however.

Leverage mass Email for targeted communications

Depending on your Salesforce CRM edition, users can send between 250 and 1,000 Emails at a time, with just a few clicks of the mouse. Sales reps can leverage personal or corporate templates to efficiently communicate with leads and contacts about new products, promotions, and upcoming events.

Take advantage of tracking

Salesforce CRM lets you track Emails, both at the level of an individual contact and for all accounts, including an overview of the exact date, time, and number of times your Email was opened. If multiple Emails are never opened, Salesforce CRM flags the contact so you can check whether he or she is still with the company.

Protect your Email templates

One of the benefits of using Email templates is that you get a consistent look and feel and control over messaging, while still letting individual users personalize their Emails. However, you may want to prevent users from changing sections of the template, such as pricing information, dates and locations, specific corporate disclaimers, policies and procedures, and of course logos and corporate branding.

Consider partner products for marketing campaigns

The Salesforce CRM Mass Email capabilities make it possible to deliver 1,000 Emails per organization per day. Although that's fine for individual reps, check out the partner products in the AppExchange to create sophisticated Email campaigns and other demanding projects. Here you'll find more full-featured apps for creating mailing lists of any size, tracking campaigns in progress, and getting post-campaign statistics to evaluate the effort.

Keep templates organized

Keep your templates up to date and easily accessible. Make sure to keep public and personal templates separate.

- Ask users to place all self-created templates in a personal folder. Use the Clone button to copy public templates into a personal folder.
- Deactivate old templates by unchecking the Available for Use checkbox. Note that deleted Email templates are not stored in the recycle bin, but are permanently deleted. If you think you may need these templates again, deactivate rather than delete them.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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