

Creating Templates in Outlook

- Enable the Developer Tab
 - File -> Options -> Customize Ribbon
 - Check “Developer”
- Open an email you want to convert to a template
- Save as template
 - File -> Save As
 - Choose Type “Outlook Template”
 - Click Save and Close the email
- Edit template and personalize
 - Developer Tab -> Choose Form
 - User Templates in the File System
 - Find your Template for editing
 - Edit and then Save As “Outlook Template”

Sending a Nurture Series (Autoresponder)

- Choose a Contact and Copy the email address of recipient
- Schedule emails
 - New Items -> More Items -> Choose Form
 - Select User Templates in File System
 - Find the template for the first email to send
 - Paste the name in the “To”
 - Add a salutation and Add a comment or some custom text
 - Refine boilerplate if needed
 - Schedule for delivery
 - Options -> Delay Delivery -> Choose date and time
 - Click Send
 - Do this for all emails in the series and different target dates

Broadcast to Contact Groups

- Create your contact group / add to contact group
 - People -> Contacts -> New Contact Group -> name it
 - Add members -> From Outlook Contacts or Local Address Book
 - Save and Close
 - Alternatively, Add new contacts to your Contact Group as they are added into Outlook
- Decide when you will send Broadcasts and put it in your calendar recurring
- Send the Broadcast email
 - Choose a blog post or Insperity email
 - Forward
 - Clean it up and add you comments and signature
 - BCC -> Contacts -> Enter your group name. Put your name in the “To”
 - Schedule to send it out at the optimal time
 - Options -> Delay Deliver -> Close -> Send