Front

How to manage a shared inbox

A shared inbox transforms the email inbox you're familiar with to suit how your team works today: collaboratively and transparently. Since it's a new concept for many teams, we created a guide for getting started with and scaling a shared inbox in Front.

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SaaS has transformed the modern workplace. Teams collaborate using chat, Google Docs, and real-time dashboards rather than with hard-copy files and lengthy status meetings. But email — the epicenter of workplace communication — hasn't changed.

With Forwards, CC's, and BCC's, a simple question devolves into an impossible-to-follow conversation chain. Email isn't suited to the collaborative nature of modern work and remains disconnected from the stack of tools that businesses rely on.

Here at Front, we're working to fix that. We've seen how shared inboxes transform how teams communicate, both internally and with customers. A shared inbox like Front makes emails sent to group addresses accessible to your entire team in one collaborative hub. Instead of creating new threads with forwards and CC's, teammates can comment and @mention each other on a single copy of an email to determine next steps quickly while preserving all of the internal context.

Front also brings the other channels you use to communicate — SMS, social media, in-app chat, and more — into your inbox, so you can manage all your messages in one place. Your shared inbox becomes a powerful platform for centralizing customer interaction history and all the information your team needs to be effective. You can even connect Front to the rest of your technology stack to bring data from your CRM, payment systems, or project management tools into your inbox where it's needed.

Front brings all your company communication channels into one place. When messages arrive in a shared inbox, your team can work together on a single copy of that message.

Chapter 1

Get Started

Let's say a prospect sends an email into your sales@ shared email address to schedule a demo with someone on your sales team.

Without Front, two reps start drafting replies and send separate emails to the sales team to claim it.

When the reps see they're overlapping, they start a chat to figure out who should respond. The first rep replies directly to the customer to schedule the demo. The rest of the sales team isn't sure who's working with the customer, but they delete their copies of the email chain and move on. Confusing, right?

With Front, that same message arrives in the Sales channel of your shared inbox. The first rep assigns the message to herself to claim the demo and starts drafting a response. The second rep sees this and moves on to the next message without wasting any time. The rest of the team can follow the conversation in the background to keep tabs on how it's going.

That's how a shared inbox should work: enabling fast, effective internal discussion and decision making, so that your team can follow up with your customers faster.

Your team will benefit from:

MORE TIME
The average worker spends 4.1 hours a day reading, browsing, and sorting through their inbox. Using an automated, shared inbox means getting those hours back to be more productive — maybe even work fewer hours.

MORE TRANSPARENCY
Don't let hard work go unnoticed. Customer-facing roles spend a lot of time in the weeds with customers, carefully cultivating relationships. More transparency will help managers see who's going the extra mile to inform recognition and career progression.

MORE RESOURCES
Context won't be lost in individual inboxes, so everyone can learn from their peers, develop faster as employees, and provide a better experience to their clients.

Step 1: Choose an inbox structure

First, decide the best way for contacts to connect with the right people on your team.

For a small company, you might just need one email address: contact@ or hello@. As you build out sales and support teams, you may want to add sales@ and support@ addresses for faster customer responses.

For large organizations, you may have addresses for specific parts of these teams, such as bugs@ for urgent issues, features@ for feature requests, and support@ for general inquiries. Setting up contact points like these gives your team a hierarchy for access permissions and routing messages efficiently.

If you want one team to handle several email accounts, you can also create multi-channel folders. For example, you could group the hello@, sales@, and enterprisesales@ email channels into a "Sales" folder for your sales team, so they can manage inquiries to those channels from one place. Here are a few ways to organize your shared channels:

BY DEPARTMENT
This is one of the most popular methods for small and mid-sized business where departments are made up of 20 or fewer employees. Creating separate sales@, marketing@, and operations@ email channels should do the trick.

BY EMPLOYEE ROLE
If you have larger departments or more internal hierarchy, break up shared email addresses by level or role. In sales, you could have a hello@ email for general inquiries managed by sales development reps, a sales@ email where they can escalate emails for account executives, and an enterprise@ email for the reps working on the largest enterprise deals.

BY PROJECT
This is a great option for companies that have a project-based business model. Marketing agencies that take on long-term contracts and bill retainers can create separate channels for campaigns and projects.

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BY CUSTOMER NAME
This is a similar option for agencies that go through small projects quickly but maintain long-term relationships with their customers. Create email channels for each customer, like coca-cola@ or mcdonalds@, and share them with the members of each client account team.

BY LOCATION
This works well for companies whose external relationships depend on geography. Logistics teams that deal with different transportation lines might create separate emails for each region, using email channels with state and zip codes such as NY10007@ or CT06011@. Determine what organization structure makes sense for your team by understanding how your team is currently handling and sorting their email.

Deciding on the best structure takes time, and you may not get it perfectly right the first time. Front is flexible and lends itself well to experimentation, so you can always iterate on the structure of your shared inbox later.

Step 2: Set up rules to automate your inbox

Once you've set up the right contact points for customers, vendors, candidates, and other external parties, you'll want to set up an automatic routing system for each folder and channel with rules. Automation eliminates manual sorting so that messages get to the right person more efficiently.

In Front, our rules engine powers automations that are flexible enough to adapt to any organization. Simply choose a trigger, clarify the condition, and input a resulting action in order to automate a process. Here are some basic automations that you can set up with rules:

EMAIL ASSIGNMENT
Every time an email comes in, automatically assign it to the right teammate. You can do this based on the "from" email address, a keyword in the subject or body of the message, or on a round robin.

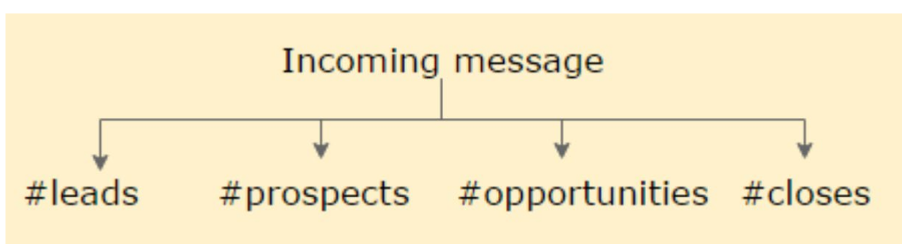
EMAIL REPLIES
In a high-volume environment, you might want to create an automatic response if an email isn't handled after a certain period of time. It can inform external parties of a waiting time, give relevant information, or provide access to self-serve resources.

TAGGING
To keep your inbox organized and easy to search through, assign tags to messages automatically. They'll give each email context and enable team members to learn from past exchanges.

Step 3: Organize your archive with tags

Once you've used rules to automate message routing, it's time to get your inbox organized. For this, you can use tags as a classification system. It will make messages accessible to the right people and create an easy-to-search archive for your team to refer back to later.

A simple way to do this is to create a list of categories that are mutually exclusive but collectively cover all the types of emails that hit your inbox. For example, a sales manager could create tags for each stage in the sales funnel:



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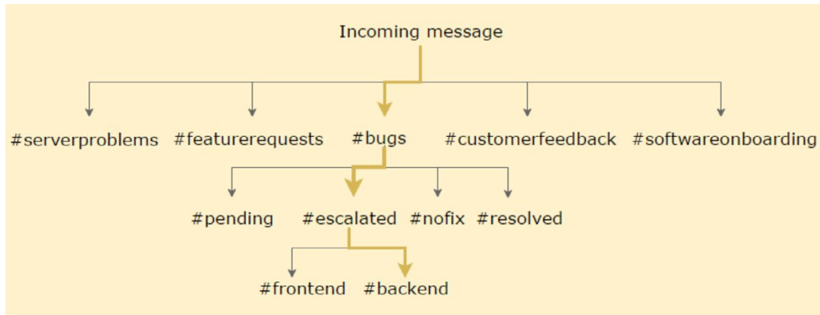
Any email that comes into the sales@ folder gets a #leads tag so that it can be picked up by a sales development rep. If they're interested after an initial demo, they can be upgraded to the #prospects tag.

Larger teams might need a more detailed classification process before they get to the right person to manage the request. Here, different team members either respond to the message themselves or attach a new tag that puts it on someone else's radar. The workflow in this case would have several tiers of tags:



> Front works best when teams are collaborating and managing all of their messages in one place, so getting your team's buy-in is critical. According to an MIT study, over 60% of managers have a hard time getting their team to switch to new tools — and believe this is due to a perceived lack of urgency and lack of communication about the benefits that come along with the new tools.

Here are the questions to ask yourself when designing your tagging system:

1. What are all the topics of conversations that hit the inbox?
2. How can I further identify or classify a message to route it to the right person or group of people?
3. What determines who's accountable for answering each email?
4. Which people on the team might benefit from the information in this email? from the information in this email?

Once you've created a basic routing structure based on tags, keywords, date, or other triggers, you can adjust over time. Gather feedback from your team to see if they're getting all the relevant messages they need and whether their email archive is a helpful resource. Start with just a few basic rules. If you see team members performing the same actions on different emails, make a new rule. Eventually, you shouldn't have to do any sorting or re-assigning manually.

You can address both problems by clearly communicating your reasons for switching to a shared inbox and how it will benefit each person, as well as the team as a whole.

ANNOUNCE THE TRANSITION
Whether you do it in an all-hands meeting or over email, openly communicate the change to everyone on your team. Pick a specific start date to keep everyone accountable.

TRAIN YOUR TEAM
A shared inbox can get complicated — especially once you've set up automation. Hold training sessions where you explain the mechanism behind the setup and share additional resources for them to refer to.

ENCOURAGE PERSONALIZATION
In addition to team-wide settings, Front lets each individual member customize their personal account. Each person on your team can customize their notification and set up their own automation rules for their private, personal inbox.

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Chapter 2

Turn your inbox into a platform

Transparency is easy for small teams. Knowing what each person is working on or getting background context on a customer is as fast as asking your teammate next to you a question or pinging them on Slack.

As your team grows and adopts additional tools and communication platforms, however, you run the risk of losing that operating speed. Important data is siloed across different apps, and your team is forced to spend valuable time tracking it down or switching back and forth between tools.

A shared inbox is a powerful hedge against that issue. Designed to function as the single source of truth for your whole team, Front connects all your tools and channels to one place — your inbox. In addition to email, you can connect your other communication channels like SMS, social media accounts, or live chat to Front to manage all your messages in one multi-channel inbox. As your team grows, Front will help you maintain the transparency that keeps everyone working as efficiently as possible.

The platform for work

For any team, choosing the right tools is only one part of the equation. Figuring out how they should fit together is the real key.

A sales team might use Clearbit for data enrichment, Salesforce for their CRM, Front for their shared inbox, and Smooch for live chat on their website. If their tools aren't integrated, anyone who wants to learn about a new customer has to switch context four times just to write an email.

When they integrate their tools through Front, that same team can access all the data they need in one place to work more efficiently and communicate better with customers. Clearbit connects with Salesforce to enrich customer records.

Salesforce records will be displayed in Front, where they can be managed or updated. Front syncs with live chat tools and allows sales reps to chat with website visitors directly from their inbox. If responsibilities change or as leads move through the funnel, every teammate will have the context they need to pick up the account.

Step 1: Integrate your team's tools

Connecting your inbox with other tools and channels means less context switching and more accessible information for your team. This powers higher quality communication, greater transparency, and operational efficiency across your entire company.

Here are a few examples of the tools you can connect to Front to centralize your technology stack around your inbox:

FOR SALES TEAMS

CRM and sales management tools like Salesforce and Base. Customer information is available to everyone in the company when they need to reach out to them, and making updates only takes a few seconds.

Cloud VoIP software such as Aircall and Talkdesk. Missed calls and voicemails are saved as messages in Front, so you can manage cold call follow up from your inbox.

FOR SUPPORT TEAMS

Customer feedback software such as Delighted and Nicereply. Customer feedback is critical for teams across the organization. Marketing teams can better understand their marketing personas, sales teams can better qualify leads, and product teams can prioritize feature requests.

Knowledge base tools such as Forumbee and HelpDocs. Your support team can quickly search for and share resources with customers, and your sales reps can research questions on the fly during calls and demos.

FOR PRODUCT TEAMS

Project management tools such as JIRA, Trello, or Asana. Track bugs and feature requests that keep coming up with customers, and create new issues without leaving your inbox.

Developer tools such as GitHub. Create issues in Github or link messages with open issues to translate customer feedback into engineering tasks.

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Step 2: Connect your messaging channels

As your business grows, customers expect that you'll be available on their preferred communication channel. In a multi-channel environment, your team is responsible for thousands of messages across multiple email accounts as well as on SMS, Facebook, Twitter, and even over the phone.

But every time someone communicates with a customer, they need context. A support rep, for instance, needs to know about what plan a sales rep sold to the customer, what trouble they ran into during onboarding, and any past interactions they might have had with the company.

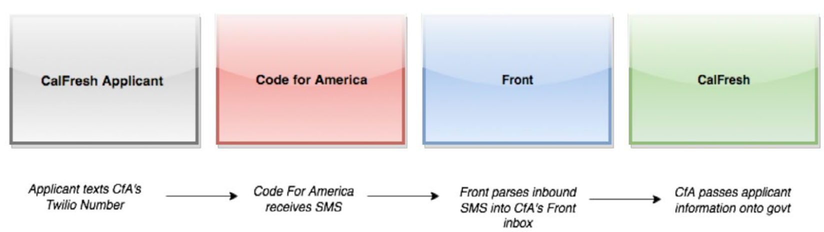
With correspondences siloed in different channels, a support rep either has to search dozens of records or go in blind.

Front brings all your communication channels into one place, so your team members can quickly and easily gather context for any conversation they have. Manage messages across all your communication channels and keep them organized with the rules and tagging structure you've already set up.

In Front's dashboard, you can create a new shared channel from your Team Settings and from there add the channels you want to funnel into Front. You can have a separate folder for every channel, or you can group channels together into multi-channel folders: like "Social" for Twitter and Facebook and "Support" for Intercom, Email, and SMS.

Code for America used this kind of system in Front to create a better system for the California food stamp program, CalFresh.

Since California has the second lowest food stamp participation rate in the US, Code for America decided to help the government improve the application process. Instead of requiring applicants to fax their application, Code for America set up a system to accept applications via SMS using Twilio and Front. Thousands of messages would come in through Twilio, and Front would process them with rules and assign applications to different agents.



Code for America lowered the time it took to apply for food stamps in California from 2 hours to 11 minutes, and they were able to reply to every question asked via SMS in Front.

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Chapter 3

Use data to optimize your inbox

Whether you're leading a sales team, a support team, or a product team, efficiency matters. Short sales cycles grow revenue more quickly, low response times contribute to greater customer satisfaction, and shipping new features quickly means more opportunity for product improvement.

As your team settles into your new shared inbox, you may notice bottlenecks or redundancies crop up that you might not have anticipated. Your carefully-designed workflow will need to adapt to changes in your business, like taking on a new type of customer or restructuring your team. Keep an eye on these opportunities to align your shared inbox with your team's current needs.

This chapter will walk you through the data and feedback that can help you optimize your shared inbox on an ongoing basis.

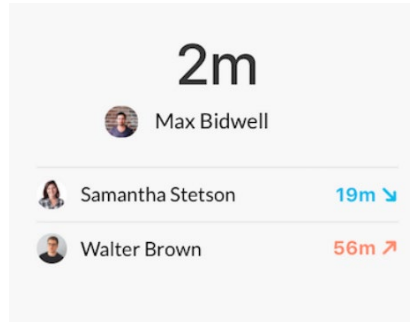
Step 1: Collect quantitative data from your inbox

Most teams use a north-star metric to measure success. Sales teams might look at win rate, while product teams might look at daily active user count. These kinds of metrics are lagging indicators — they tell you what you've done well and what could use improvement. But how your team can improve those lagging indicators is a mystery without more data.

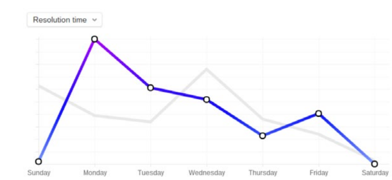
In Front, here are the metrics you should be looking at to evaluate how your shared inbox is working for your team:

REACTION TIME
How quickly does your team take action on a message? Any action on the message — whether it's a response, tagging, or re-assigning — willcount toward this metric.

A slow reaction time points to inefficient message routing. Either messages aren't getting to the right people quickly enough, or team members are having to deal with too many messages manually.



RESOLUTION TIME
How long does it take your team to resolve a conversation? To count towards this metric, at least one response must be sent before a message is archived. A slow resolution time points to data silos. Tags should help your team find relevant messages, and integrations will help connect outside context with your inbox.



BUSIEST TIME AND DAY
When do you see spikes in message volume? Poor performance on high-volume days indicates that your team is spread thin. You may want to move meetings and projects around to less busy times, or even create a schedule that ensures that you have all hands on deck during the most critical times.

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The exact benchmarks for each metric will be specific for your team. As you observe these metrics over time, you'll get a better sense for what's good or bad, but in the beginning you can gauge performance by seeing how much these numbers vary. If some of your team is hitting an 8-minute resolution time, while just a few are in the 1-hour range, it makes sense to investigate that variance further.

Use each metric as a starting point for finding inefficiencies with how your team is using Front. With the transparency of a shared inbox, you can see in detail what's slowing down your team. For example, if you're managing a support team and want to improve a slow resolution time, you can review example messages to see what information reps weren't able to access quickly.

Step 2: Collect qualitative data from your inbox

Any inefficiencies or pain points will be most obvious to the people using it every day — your team. Empower them to speak up once they have a problem or idea for improvement, otherwise they may brush off small inconveniences and hesitate to share them. Communicate that your team should freely share ideas, suggestions, and even pain points:

BOTTLENECKS
When is your team limited by capacity? If there aren't enough hours in the day for every message or specific team members are responsible for too much, your team will feel the strain of uneven workload distribution or burnout.

CONSTRAINTS
When are people on your team not equipped with enough information to answer a message? If critical information lives in another tool, in personal files, or in a teammate's head, it's likely to slow down your team.

REDUNDANCIES
Are you seeing duplicate threads about the same topic? Front should reduce duplicated work by design, but you should check in with your team to make sure messages are being shared with the appropriate people to make sure everyone is in the loop.

Once your team knows what to look out for, create a simple way for them to surface issues and ideas, like a "bug board" for any workflow issues. Make an Asana project where team members can add tasks that include screenshots and descriptions — they can do this directly from Front with our Asana integration.

Conclusion

Front: the shared inbox for teams

Companies today have access to thousands of tools and apps that try to make communication and collaboration as efficient as possible. Traditional email platforms have failed to meet these standards, which is why so many people have predicted that email would become obsolete.

At Front, we've realized that email isn't dead. It's just broken.

We eliminated what people dislike so much about email — confusing email threads, cluttered inboxes, siloed information— and kept what people love — the ability to engage with people through the most prevalent communication channel in the world.

Front is flexible enough to accommodate any team's workflow and can turn your inbox into a platform at the very center of all your workplace communication. Rather than context switching between apps or hunting for email threads, your team can focus on creating an amazing product and service for your customers and talking with them like people.

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