

A large, stylized blue envelope icon is positioned on the left side of the slide. It is composed of several overlapping geometric shapes in different shades of blue, creating a layered effect. The envelope is oriented horizontally, with its flap pointing towards the top left.

Shared Inbox Management: A Playbook for Customer & Client Facing Teams

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FOREWORD

Shared Inbox Management: A Playbook for Customer & Client Facing Teams

Welcome! If you're looking to learn about shared inboxes, you've come to the right place. Whether you're wondering what a shared inbox is and why you'd use one, seeking best practices to make the most of your existing shared inbox, or assessing the impact a shared inbox could have for your team and your customers, there's something for you in this playbook. To give you a taste of what's ahead, here are some of the questions we explore:

Intro - Businesses run on email

We'll cover a quick history of email and how it's evolved to help teams work together in shared inboxes.

01 - All about shared inboxes

Get all the basics: why a shared inbox is different than traditional email, what benefits and challenges you might encounter with a shared inbox, and the different options that exist for managing shared inboxes.

02 - How customer-facing teams use shared inboxes

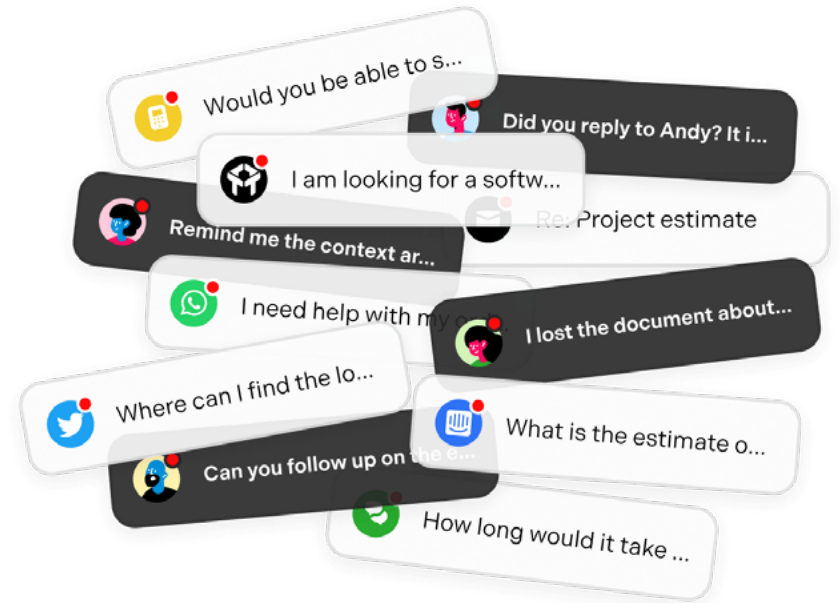
Shared inboxes can be particularly useful for customer-facing teams. Here we'll cover common workflows that support, sales, and success teams use to get work done in shared inboxes, and how shared inboxes can help improve customer experience.

03 - Setting up a shared inbox for your team

How can your team make the most of a shared inbox? Learn shared inbox best practices, how to balance workloads, set up automations, build templates, and measure performance to help your team work more efficiently in shared inboxes.

04 - Choosing the right shared inbox tool

It's go time. You want a shared inbox tool, but you're not sure which one is right for your team. Learn what to look for in your search to choose the right tool and set your team up for success.



Alright, let's get started! 🚀





INTRODUCTION

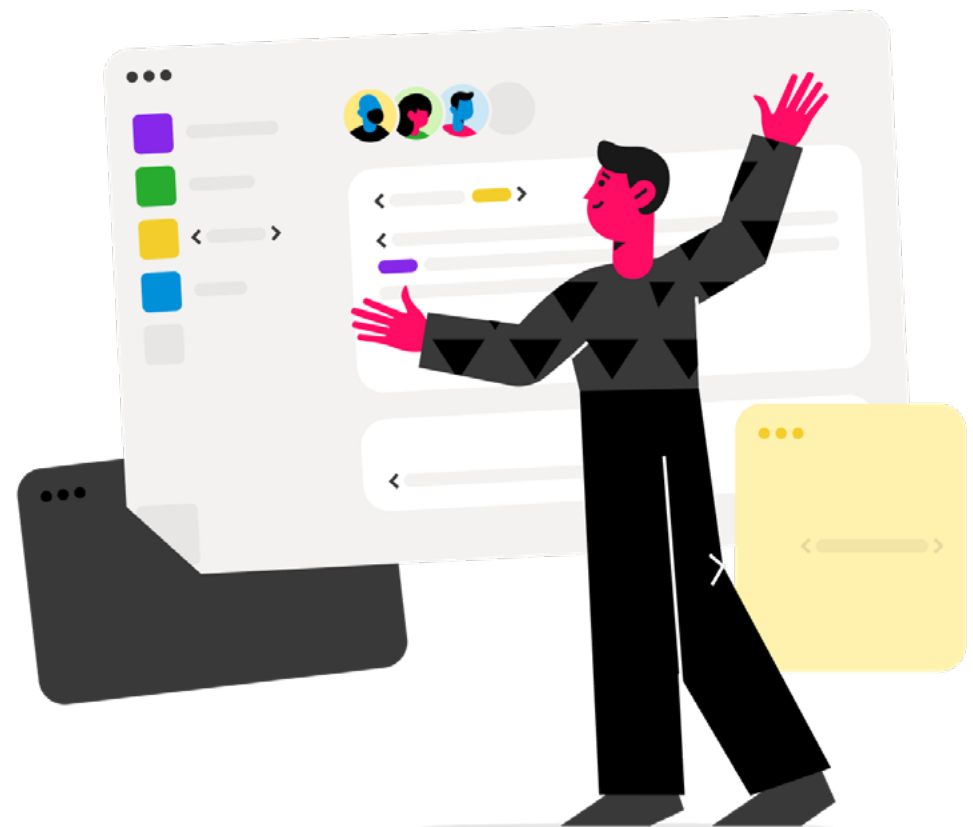
Businesses run on email

Email is the most widely used work communication tool on the planet. An estimated 1 billion workers rely on email to get work done, and **61 percent** of people say they're getting more work email each year.

Email is far from dead

When a customer has a question, they expect to be able to send you an email. And when teams need to communicate, email is the most reliable channel to get a response. While tools like internal chat and video have emerged to allow us to connect with our customers and teams, it's clear that email remains an essential and irreplaceable communication tool for work.

- 86 percent of workers prefer email for work communication.
- More than **half of people said email is the primary tool** they use to get work done and critical to their team's workflow.
- The average person **receives 55 business emails** per day.
- 22 percent of people say they check work email multiple times per hour or constantly outside of work.



Email is changing for the better

Email was invented in the 1970s. It was built for one-to-one communication — to send a single message to another person.

But the way we work has changed since then. One-to-one communication isn't enough. We're collaborative and dispersed across the globe. We're deeply connected to each other — and we rely on our teams more than ever before.

Email wasn't built for working together. With Forwards, CC's, and BCC's, a simple question to a teammate devolves into an tricky-to-follow conversation. It's especially tough with group email addresses, like `contact@` or `support@`. Collaborating on email is messy — and on the other end of the conversation, your customers can feel it.

That's why shared inboxes were born: to rethink email for modern, collaborative work. Since email is core to our work, it can feel a little strange to change the way we manage it. In this playbook, we cover all you need to know about shared inboxes, why teams use them, and how they differ from the traditional email we're used to.





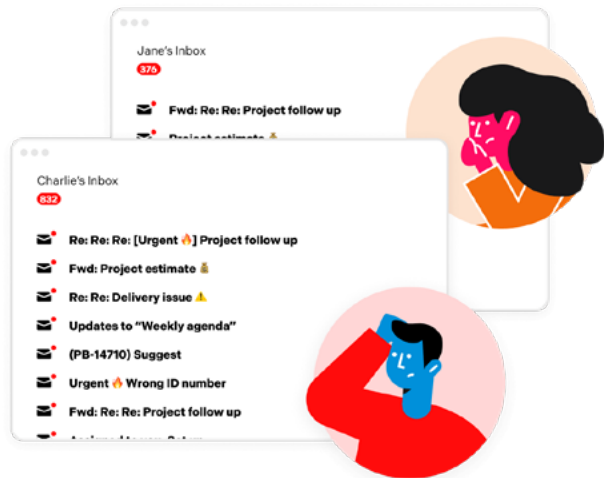
01

All about shared inboxes

Here we'll cover all the basics of shared inboxes, like the definition, how they work, plus the benefits and challenges that come from using them. But first things first: What's wrong with the email we're used to? Why are teams using shared inboxes to manage email instead?

The problems with traditional email

Traditional email presents several problems when teams try to work together. Email can get complicated quickly, but it's especially messy when teams use group email addresses, like team@dundermifflin.com. Here's why.



Email overload

We spend a great deal of time on email at work. The average person **receives 55 emails each day**. And when you're a part of a group email address (or many), it piles up even more.

Reply-all woes

Hitting reply-all means everyone who's on the email thread or part of the group alias gets yet another email — often one they don't need to read.

No visibility and lack of ownership

When you receive an email to a group address, there's no way to tell if someone has answered, or who's responsible for doing so. Often, everyone assumes it's been handled, so no one replies at all. Or, two teammates send two different replies to your customer.

Unprofessional confusion

If you have a question about a customer email, you might forward it to your teammate or CC them to have a conversation about it. This means customers get long, messy forwarded email threads from your team.

If you've run into any of these problems at work, a shared inbox might be for you.



What is a shared inbox?

We're glad you asked. A shared inbox is an email inbox that many teammates can access to manage email from a group address like *info@dundermifflin.com* or *sales@vancerefrigeration.com*, for example.

How do shared inboxes work?

With the email we're used to, group email means that anyone who's a part of a distribution list or group alias gets their own copy of every email. One person can reply to an email, and unless they hit Reply-all, no one else will see it. If someone deletes an email, everyone else can still see their copy in their inbox.

Things work a little differently with a shared inbox. You're all looking at the same queue of emails. When one person replies, everyone who has access to the inbox can see it. When someone archives an email, it leaves the inbox for everyone.



What are the benefits of shared inboxes?

While every company is a little different, there are a few benefits all teams tend to see when they start using shared inbox software:

No more emails slipping through the cracks

You can assign messages to set owners for specific teammates, so your team won't miss an email or drop the ball, even when you're dealing with high email volume.

Less email for everyone

With a shared inbox, you don't have to reply-all to let everyone know you've got it handled. Everyone works through group email together, rather than getting their own copy of every email.

Information & context for everyone

No more poking teammates for help or waiting for internal replies. When you have a question about a customer, simply search their name in the shared inbox to access the context you need.

Faster response times

With less email to parse through, no confusion on who's answering what, and access to all the context you need, you can get back to customers faster.

Security

No more sharing email passwords and feeling lost every time you log back in. A shared inbox eliminates this security hazard.

Continue work across time zones

Keep customer conversations going even when one shift is off for the evening. In a shared inbox, your teammates can see the whole email thread and pick up right where you left off.

Visibility for managers

Managers can monitor conversation content, keep an eye on workload, and stay in the loop on progress at-a-glance.

Avoid spinning wheels on unimpactful work

When your team is trying to cut through the mess of their inboxes each day, they're losing time that could be spent on work that's more fulfilling and moves the needle for the business.

Improved customer retention

When you're responding faster and more personally, customers feel cared for and want to stick around.



What are the challenges of shared inboxes?

A shared inbox allows your team to access a shared view of emails. It does not establish internal processes around how your team should handle those emails. That's the part you and your team get to decide. Be aware of these other challenges when you're considering using a shared inbox:

Email transparency can be scary

If someone on your team isn't accustomed to answering a customer email and having other teammates be able to read their reply, a shared inbox can be intimidating.

Ownership should be clearly defined

If your team is accustomed to having clear ownership over emails from certain customers, for instance, a shared inbox can make them feel uneasy and territorial.

Team rules should be established

A shared inbox is a different way of working. Explain to your team and new hires how to use a shared inbox, so everyone is on the same page.

The power of deleting an email

If someone deletes or archives an email in a shared inbox, it will reflect that way for everyone. Make this clear to your team so they know the consequences of the actions they're taking.



The best ways to manage shared inboxes

There are several ways teams manage shared inboxes today. The most popular email clients that teams use, Outlook and Gmail, have basic shared inbox features so you can manage email together. You can also use robust shared inbox software, like Front. We'll go over the basics of each below.

Outlook

Outlook is Microsoft's email application. Beyond standard individual email accounts like *phyllis@dundermifflin.com*, there are a few ways teams can manage group email in Outlook:

- **Office 365 Groups:** teammates can be added to a group to share resources like a shared mailbox, calendar, or document library.
- **Outlook Distribution Groups (or Distribution Lists):** a general address that distributes emails to a list of other email addresses. You cannot send email from the distribution address. You can only send to the email address.
- **Shared Mailbox:** an inbox that allows many teammates to send and receive email from the same general address.



Read why many teams are replacing Outlook with Front



Gmail

Gmail is Google's email client. Gmail created Google Groups to help teams share emails and work together on them. There are two common types of Google Groups:

- Email List: a single email address that you can use to contact many teammates at once. You can only send email to an email list. You cannot send emails *from* the email list address.
- Collaborative Inbox: a shared inbox that allows teammates to send and receive email from the same general address. You can assign emails and tasks to each other and track statuses.

Shared inbox software

Shared inbox software is built specifically for helping teams work together on email. You can plug all kinds of email addresses into it to manage shared inboxes and individual work email, like *bob@vancerefrigeration.com*, in a single platform. Shared inbox software, like [Front](#) has a few other features that are designed to help teams work together:

Many communication channels: Shared inbox software is multi-channel, not just for email — teams can manage other messages like SMS texts, tweets, live chats, phone logs, social media, and more in shared inboxes, along with email.

Easy collaboration: You can comment *@angela, can you help with this contract?* on an email, instead of forwarding or cc'ing a teammate. You can also share email drafts with teammates, so you can edit together before sending to customers.

Integrations: Shared inbox software connects with other apps, like CRMs, project management tools, knowledge bases, and more, so you can access that information directly in your inbox.



Email transparency

Successful companies like Stripe and Buffer sing the praises of the concept called email transparency. It's when your team promotes sharing email with each other, so that everyone has the context they need to get work done. The easiest way to have email transparency is through a shared inbox. It can feel jarring at first, leaving teams feeling a little skeptical:

- *Why would I need to share information with my team?*
- *This sounds super overwhelming. I don't need more email to look at.*
- *I don't want my team to see my emails...*

But teams that practice email transparency tend to say that everyone has less email to sort through, since you can answer shared emails together. There are fewer updates and forwarded FYIs flying around since you can collaborate directly on email threads. And, if you're all doing your best in your email replies to customers, then you don't have anything to hide. Instead, you can help each other improve.



Read more about email transparency





02

How customer-facing teams use shared inboxes

Shared inboxes are particularly popular with customer-facing teams like support, sales, and customer success. We'll cover the most common types of communications teams manage in shared inboxes below:

- **Support requests:** Clients get help by contacting *support@dundermifflin.com*.
- **Customer success management:** Customers maintain a relationship with the customer success team by emailing *success@dundermifflin.com*.
- **Dedicated account management:** Clients contact their account manager or account team at their custom address like *deckert@dundermifflin.com*.
- **Inbound sales inquiries:** Prospects email *sales@dundermifflin.com* to arrange sales calls.

Using a shared inbox for customer support

Support teams who love personalization tend to prefer using a shared inbox to manage email, like *support@dundermifflin.com*. Here are the most common workflows teams use to manage customer support communications in a shared inbox:

- **Prioritize requests into tiered inboxes:** Automatically or manually move requests into tiered inboxes so your team knows what needs an urgent reply, and what can wait.
- **Escalate technical issues easily:** Move technical support issues to a dedicated inbox, or easily pull in a technical support rep with an internal comment on an email.
- **Knowledge base:** Integrate your knowledge base into your inbox to search, find answers, and insert articles into replies in a few clicks.
- **Track common bugs and issues:** Tag requests based upon issue, customer, or feature to understand common challenges and prioritize bug fixes.
- **Meet SLA requirements:** Set alerts when a VIP customer submits a request.
- **Monitor and improve response time:** Watch metrics like response time and more on a team and individual basis.



Help desk vs shared inbox?

When it comes to customer support, many teams use a help desk to manage and respond to customer requests. Depending on how your customer support team operates, however, a help desk isn't always the best option. A shared inbox can be a great alternative to a help desk because:

Shared inboxes require minimal effort to get going

First things first — if your team needs to be up and running on a new tool quickly, a shared inbox platform typically requires less effort to set up than a help desk.

Shared inboxes are easy to use

When a new hire joins your team, you don't have to spend hours on training. A shared inbox feels just like your email client, so it's intuitive to learn, just like Gmail or Outlook.

Shared inboxes allow for a more personal customer experience

Traditional help desk tools attach ticket numbers to every message. While this is great for organization, it makes the customer feel like just a drop in a vast ocean of tickets.

Shared inboxes are more flexible

Help desks typically have a more rigid process that's standardized to support teams, so they're more limited in the ways you can route and assign messages, especially outside your support team. You can customize shared inboxes to your unique processes, and if you have complex questions that need escalation, you can easily loop in those teammates.



Read the questions to consider before choosing a help desk



Using a shared inbox for customer success and account management

Managing customer relationships, whether you're in customer success, client services, or any other type of account management, requires being on top of email. Because of that, shared inboxes are usually very helpful for managing emails to *success@dundermifflin.com* or *deckert@dundermifflin.com*:

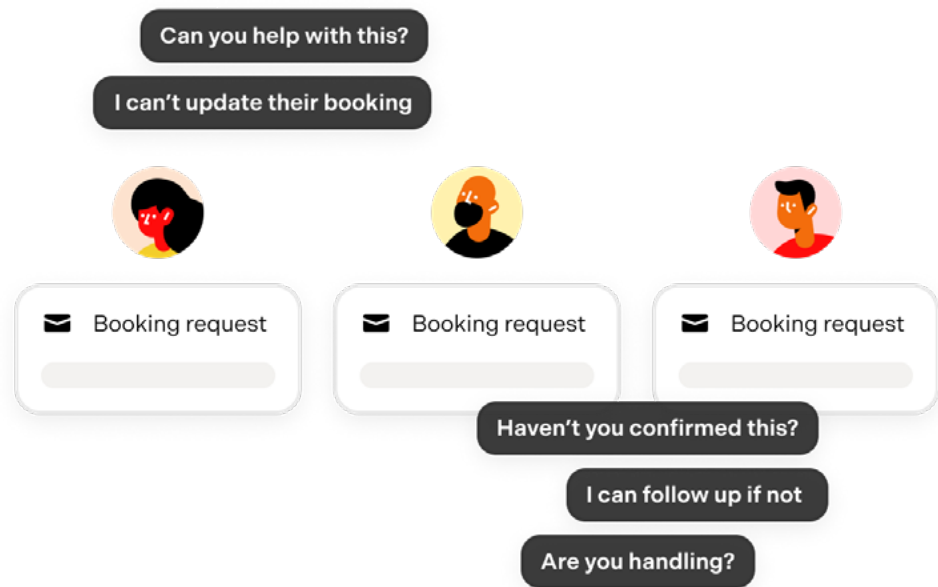
- **Route emails to the right account owner:** Move emails to the right account owner automatically with triggers like keyword, sender, subject, and more.
- **Go out of office without dropping a conversation:** Automatically move customer emails to a shared inbox when you're away, so you get peace of mind and your team can easily jump in and reply.
- **Integrate your CRM or custom database:** Reference a customer's history and journey with a CRM or custom database directly in your inbox.
- **Easily escalate and collaborate on technical issues:** Assign technical issues to engineers or easily loop them in to edit email drafts together.
- **Set reminders to follow up:** Schedule a time for an email to come back if it hasn't been replied to — so you don't have to worry about remembering on your own, even months later.
- **Schedule personalized emails throughout the customer journey:** Use mail merge to put customers into personalized email sequences at designated times.
- **Insights for success:** See which customers require the most care to better distribute workload among your team.



Using a shared inbox for sales

Getting back to leads quickly is a top priority for most sales teams. In a shared inbox, your team can work on the queue together — with no duplicate replies or confusion on who gets each lead. That's why shared inboxes are popular for managing sales inquiries like *sales@dundermifflin.com*:

- **Round-robin leads to your team:** Evenly distribute emails to *sales@dundermifflin.com* among your reps to balance workload automatically.
- **Integrate your CRM:** Reference and update Salesforce opportunities directly in your inbox.
- **Set reminders to follow up:** Schedule a time for an email to come back if you haven't received a reply.
- **Easily schedule meetings:** Easily schedule meetings, check calendar openings, and let prospects book time slots with you in a few clicks.



Working together to improve customer experience

Whether you're answering support requests, responding to sales inquiries, or building long term relationships, being in a customer-facing role is highly demanding — and highly dependent on email. Shared inbox software is specially designed to help teams work together on email, so teams find it improves their customer experience in many different ways:

Faster, more thorough responses

Customers want quick answers, but they also want correct information. Looping in customers quickly

Work together on replies

Teamwork makes the dreamwork, right? In a shared inbox, you can leverage your team's collective brainpower to solve customer questions with fewer back-and-forth conversations.

More manageable workload

Shared inboxes significantly cut down on the email each individual receives each day. Less email = more time to get work done!

Access to customer context and history

No one likes answering the same question twice. With a shared inbox, you can look back at past conversations you've had with a customer, even if it was with someone else on your team. This means it's easy to get the full picture of every customer, and you don't have to bug customers to learn more or ask repeat questions.

Personalized experience

Saying, *"Hey Pam, how'd your vacation time in Niagara go?"* isn't possible when you didn't know (or forgot) that she even went on the trip. With access to conversation history in your shared inbox — even with other teammates, you can get much more personal.





03

Getting your team started with a shared inbox

In this chapter, you'll find best practices for setting up a shared inbox for your team, tips to help your team start working efficiently in a shared inbox right away, and a list of ways you can measure your team's performance with a shared inbox.

Best practices for managing a shared inbox

As a leader, you can set up automation and templates in your shared inbox for your team to use. You can also connect other apps to give everyone a jump start. Follow these best practices to help your team get up and running smoothly:

Build email templates

Save common responses so you can easily reuse them, send consistent responses faster, and spend more time personalizing responses.

Save email signatures

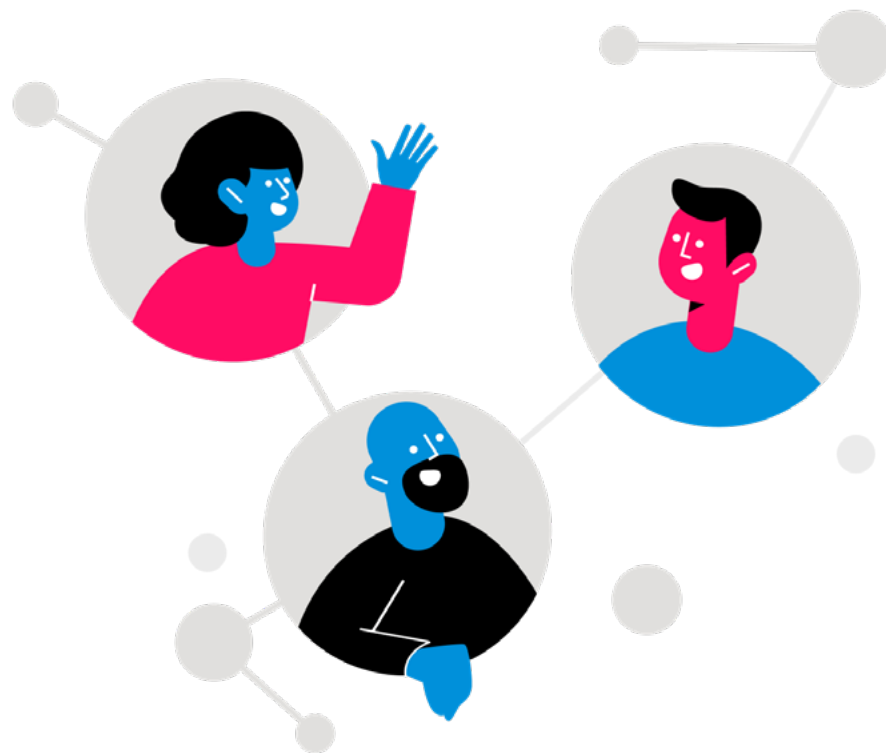
Save several signatures so you can sign off appropriately depending on the inbox you're working from.

Automate little tasks you repeat often

Got an email that your teammate, Phyllis, can handle? Use keywords, sender, or other triggers to automatically route emails from the shared inbox to her, so it's out of everyone else's way.

Integrate your calendar

No more clicking around to send invites and check availability. Connect your calendar to your shared inbox so that your team can manage their schedule directly next to their email.



Assign tasks and emails in a shared inbox

Shared inboxes allow you to get emails into the right hands easily. When you know the right person to answer an email, assign it to them so it's clear that they're responsible. Make sure your team knows when they should do this, too.

Onboard new teammates

A shared inbox makes it much easier to teach new teammates the ropes. They can get examples from the rest of the team by browsing the inbox, and you can leave internal notes on emails to help guide them through conversations.

Connect other apps to your shared inbox

Integrate your other critical apps into your shared inbox so you can update and reference Salesforce, make a Jira ticket, and more, directly from your email.

Get insight into customer communications

If you need to keep consistent messaging, get an update on a client's status, or keep tabs on conversations on VIP customers, a shared inbox allows managers to do this without having to share passwords, ask for forwarded email threads, and feel like a lurker on their team's email.

Track performance metrics to constantly improve

Trying to lower your response times? Got strict SLAs to adhere to? What's your busiest day of the week? A shared inbox aggregates all your team's messaging so you can measure real-time performance metrics, report on them to customers, and help your team hit your goals.

Create shared inbox roles & permissions

Get maximum control over your inbox by setting custom permissions for your team. For instance, keep your team's voice and organization consistent by setting limits on who can create email templates or create folders or labels.

Manage shared inboxes across time zones

Shared inboxes are especially convenient for teams who are working remotely or are dispersed across the globe. When one time zone heads home for the evening, the next time zone can easily pick up their shift and access all the conversations that need to be answered.

Take vacation with a shared inbox

Shared inboxes have the unique ability to alleviate vacation stress. You can delegate your messages to a teammate so they can answer while you're out. That way you're not worried about messages getting trapped in your inbox with no answer.



Tips for getting your team started with a shared inbox

People usually act a little differently when they're in a group setting, versus on their own. Same goes for email! Establishing some shared inbox processes ensures your team is on the same page and feels confident when they come to work each day. Your team's processes will vary, but there are some guidelines that remain pretty consistent among shared inbox users:

Assigning emails

Assign an email to yourself if you're going to answer it, and assign it to someone else if it's clearly for them. If you're not sure, ask them in an internal comment on the thread before haphazardly assigning it to them.

Archive wisely

Don't close out emails that everyone might need to see or might not be finished. If you're not sure, always ask!

Chat it out

If you're not sure about something, use the collaborative features of your shared inbox to ask a teammate.

Check the inbox first

If you need an update on a customer's status or to check on some project specs, first think: Can I find this information in a shared inbox somewhere? That way you avoid interrupting your team unless needed.

What communication channel should I use?

When you're establishing processes around your shared inbox, it helps to also specify when your team should use certain communication channels. If you use internal chat like Slack or Teams, what types of messages should go there? What should stay in email? When's a good time to schedule a meeting instead of sending an email? By laying out guidelines, everyone can be more productive.



**Read Front's Guide to
Productive and Effective
Internal Communication**



Measuring team performance with a shared inbox

For customer-facing teams like sales, support, and customer success, work happens almost entirely in your inbox. As a manager, it's hard to get insight into your team's work when you can't see it. A shared inbox allows team leaders to get insight into the work of each team member, and the team as a whole.

Individual performance

Drill down into each teammate's performance like response time, replies to resolve, and to keep a pulse on workload and help teammate's improve.

Team performance

Unite your team behind common goals, increase engagement, and know when it's time to hire by tracking team-wide messaging metrics.

Customer

Get insight into the workload required by each customer to assess charges and evenly assign workload.

Teaching moments with a shared inbox

Shared inboxes allow your team to lead by example. Since your team can browse through messages in your shared inboxes, new teammates can easily get a sense of how they should be communicating. Leaders can easily share drafts and leave comments to guide junior employees through conversations and train new hires on voice, tone, and situational problems. We call these "teaching moments" — when you're helping each other do better work just by doing good work.





04

Choosing a shared inbox solution

Teams of all sizes in all industries work together with shared inboxes. When you're evaluating options, think about not only the key features your team needs to get work done, but also the features that would make it simple for you to set up and manage.

Features to look for in a shared inbox solution

Below we've listed out the core functionality every shared inbox solution should have. Look for these features when you're choosing a solution.

Simple collaboration

This should be the strong point for your shared inbox! Look for: the ability to assign messages, the ability to chat internally with your team directly on emails, and the ability to work together on shared drafts in real time.

Multi-channel communication

Do you want to manage live chat, SMS texts, and social media messages, or only email in your shared inbox? Some shared inboxes, like [Front](#), enable you to connect all the above.

Individual email

Your shared inbox should allow your team to also input their individual email, so they can manage it all in one place with their shared emails and stay organized.

Automation

Do you have actions you'd like to get done instantly, like routing messages, tagging, or archiving? Your shared inbox should allow you to set up automation so that you're not stuck doing tedious tasks.

Productivity features

Can you snooze emails, set reminders to come back to emails later, and access your calendar instantly from your inbox? These features help individual teammates stay on top of follow ups and never miss a message.

Ability to disconnect

Can your team switch a button to go offline for the day? This is critical if your team goes on vacation or works on shifts. If you switch offline, your messages go back to the shared inbox they originated in, so the rest of the team can work on them while you're out.



Shift scheduling and workload balancing

Some shared inboxes allow you to evenly distribute new emails amongst your team, matching a shift schedule directly to your inbox workflow. If you've got a global or remote team, this helps you respond faster, no matter what time it is.

Integrations with other apps

The most robust shared inboxes help your team stay on task by integrating with your favorite apps and tools, like Salesforce, GitHub, Asana, Trello, JIRA, and more.

Flexibility to work with anyone

The best shared inbox solutions allow you to collaborate on email with anyone you work with – whether they're part of your company or not. Look for a tool that allows you to invite guests to work together, without needing to get the app itself.

Easy setup and training

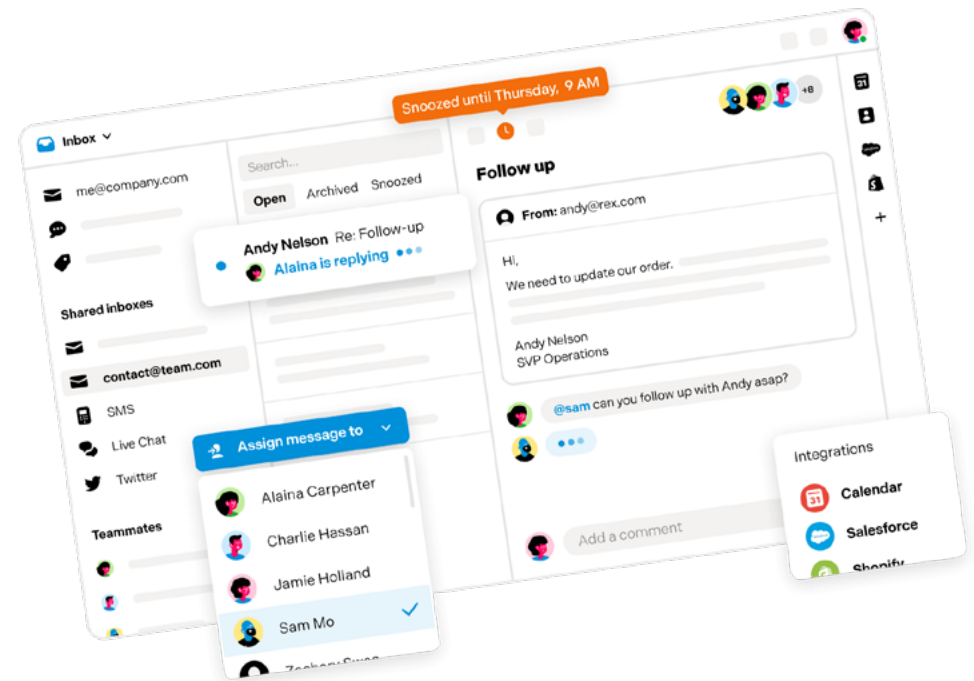
It should be simple to connect your email accounts and get up and running quickly. When you configure settings for one inbox, or teammate, you should be able to easily replicate those settings when you add another.

Customer support & success

Can you get help when you need it? The best shared inbox solutions come with dedicated support and success teams that have expertise to help with setting up, training, and guiding your team toward your goals.

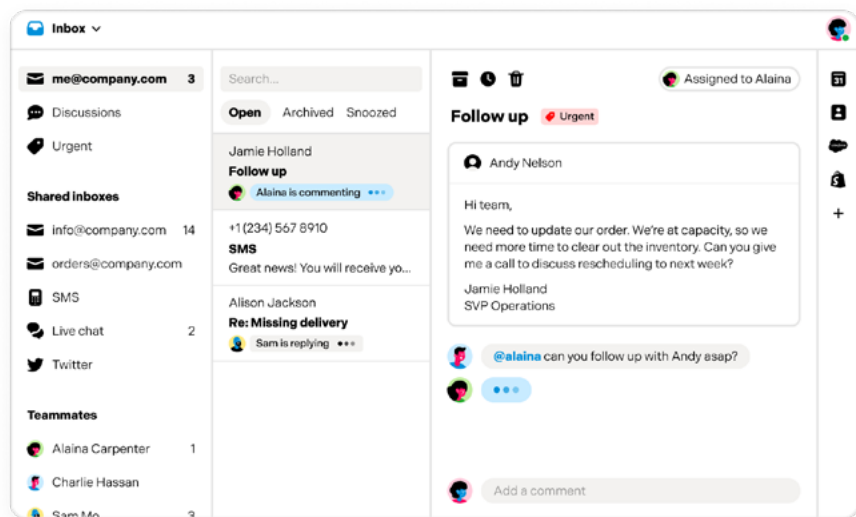
Mobile app

Will your team need to work on the go? Look for shared inboxes software with a mobile app to ensure your team can access their work when and where they need it.



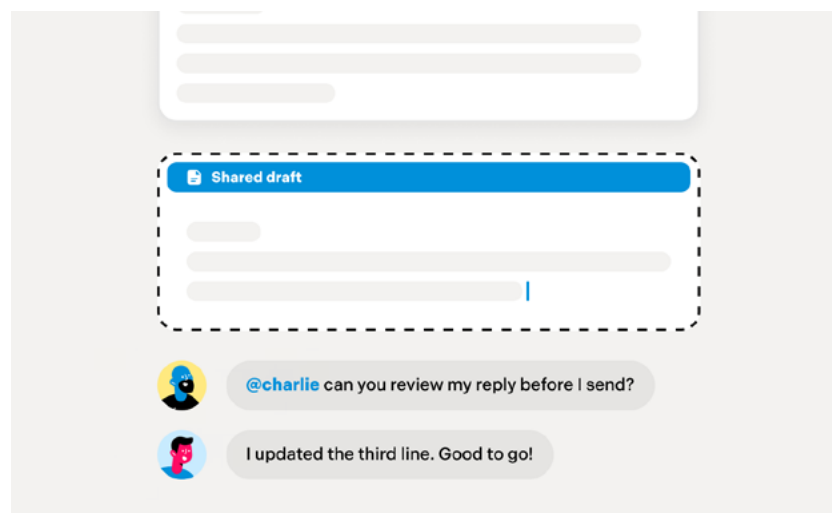
Using Front to manage shared inboxes

Front is a platform built for managing company communications as a team. Front feels like traditional email, but with five revolutionary improvements that help customer-centric teams work together more efficiently. Beyond the core functionality of traditional email, here's what sets Front apart:



Multi-channel platform

Manage group email, individual work email, SMS texts, live chat, and social media messages in shared inboxes in Front.



Easy collaboration

Comment internally, assign emails, and share drafts to work together with your team. Kick off internal discussions directly in your inbox to keep all your work chatter in one place.



Faster response times

By saving time and giving you the context you need to reply, teams reply on average 56 minutes faster with Front.

Efficiency & automation

Set reminders, save canned responses, and build rules to automate tedious tasks. Teams who use Front save on average 6 hours per person, every week and tackle [email overload](#).

App integrations and API

Connect 50+ apps like Salesforce, Asana, and Jira to Front natively, or build a custom solution on our open API. See all [Front integrations](#).

World-class service

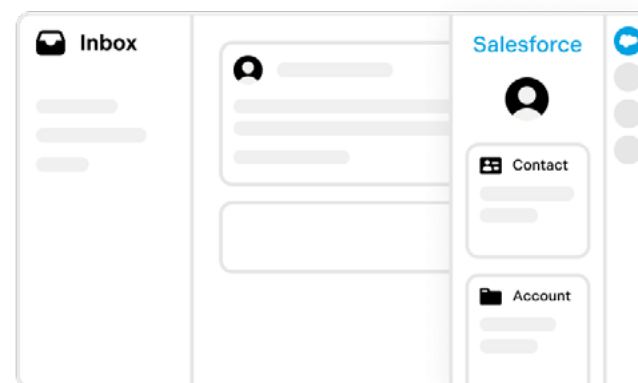
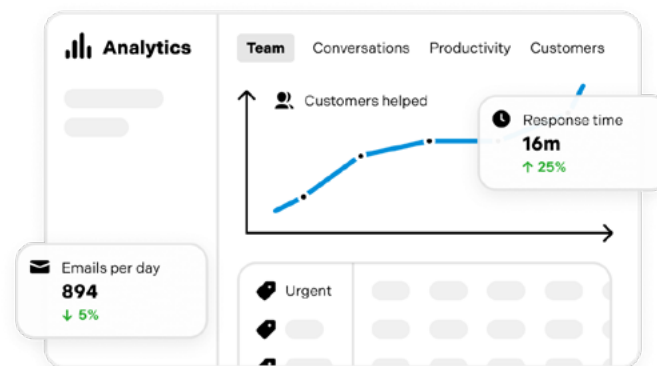
Front's global customer support and success teams give [award-winning service](#) that will help your team from personalized training to finding custom solutions.

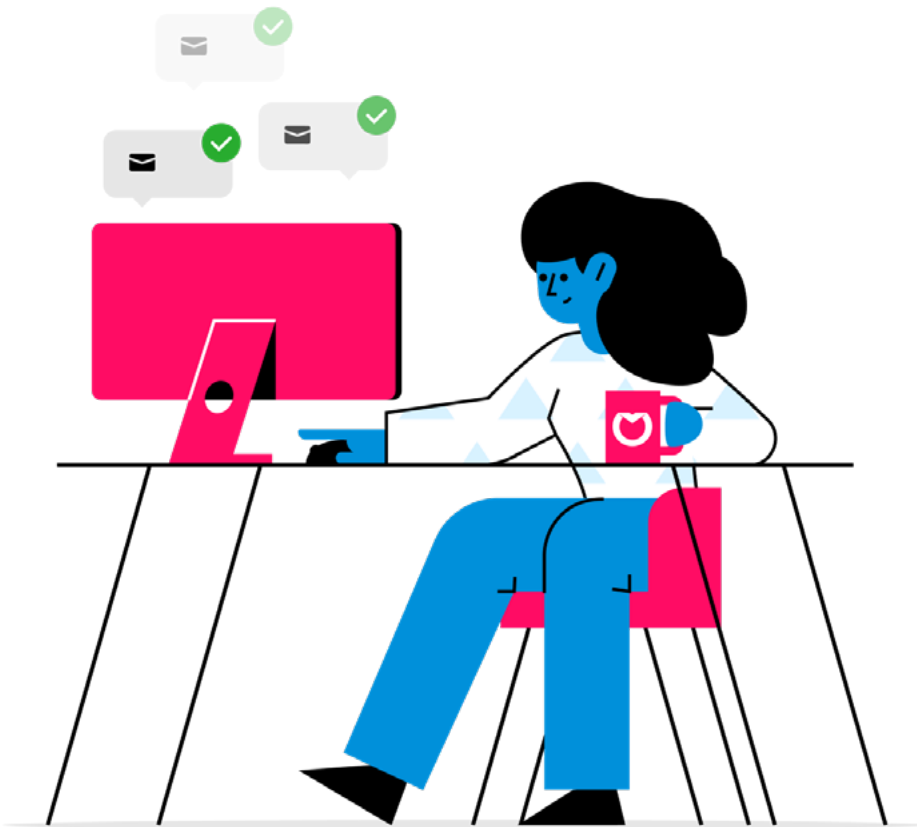
A reliable track record

Shopify, Dropbox, SSY, Stripe, and more than 5,000 teams across the globe rely on Front to power better client communication. [Read more stories from Front customers](#).

Flexible pricing to fit teams big and small

Choose from [monthly or annual plans](#) in three tiers and add-on features. Add light users with limited functionality. Invite guests to collaborate outside your team for free.





CONCLUSION

That's a wrap. Email is the most widely-used workplace technology on the planet, but it could use a facelift. Today's teams depend on **collaborative email** and shared inboxes — so cheers to you for paving the way to better work for your team.



Want to try out Front for your team? Take it for a test drive free.



ABOUT FRONT

Front replaces corporate email with an inbox that unites your team to do their best work. It transforms work email into a powerful platform that provides easy access to the people, messages, and apps you need to act quickly and effectively. More than 5,500 businesses are using Front today to get a shared perspective on the communications that power their business, stay aligned, and become more productive — as a team. Founded in 2013, Front is helping businesses everywhere unlock their team potential by enabling people to do the most meaningful work of their lives. Learn more at frontapp.com.





A large, stylized blue envelope icon is positioned on the left side of the slide. It is composed of several overlapping geometric shapes in different shades of blue, creating a layered effect. The envelope is oriented horizontally, with its flap pointing towards the top left.

Shared Inbox Management: A Playbook for Customer & Client Facing Teams