



LeanMail

Breaking email

Solution: **LeanMail Plan**

A personal assistant for your inbox.

LeanMail prerequisites: None

Technical Requirements involved: The LeanMail add-in is designed for computers running Outlook 2010 - 2016 (32 and 64 bit versions) and Microsoft365 on Windows 8-10. Available for the Mac version of Outlook by the end of 2021.

For more information see the document, *LeanMail Add-in Description and Technical Information*.

Description:

LeanMail Plan is for any Microsoft Outlook user that wants to ensure that mails are never forgotten or answered too late, and who want a clear overview of what needs to be done and when.

LeanMail Plan task list feature eliminates the need to drag and drop to your Task or Calendar section or makes a separate to-do list.



Problems solved:

- Outlook users have to remember too many things
- Emails are read over and over again
- Converting emails into tasks by dragging and dropping is clunky
- Important emails are left unanswered or answered late
- Accuracy in responding to email is hit or miss
- Lost sales
- Poor customer service



Personal benefits:

- Extremely easy to use
- Dashboard that gives you complete command and control over your inbox
- "Today view" updates task list every day
- Like a mini-CRM in your inbox
- Virtually eliminates stress
- Leverage advanced features in Outlook you did not know existed
- Auto-workflow guides you through the process of getting things done

Benefits to the organization:

- No need for employees to remind each other of emails
- Customers are answered on time
- No deals are lost due to poor response times
- Managers can review each user's email task list
- Bolts seamlessly on to your existing Outlook with no connection to external servers
- Employees are less stressed by managing email
- Can be pushed out centrally by IT
- Installing one add-in gives users access to all bite-size LeanMail products on demand
- Personal, Virtual, eLearning and free video tutorials available
- 24/7 support



Features and functionality:

Note taking

Take notes directly on emails in your inbox.

Task conversion

Emails are automatically converted into tasks without moving or clicking on them.

Due dates

Highly intuitive method sets due dates on tasks by just entering your thoughts.

Plan, Today and All views

See what needs planning, what is due today, and All due dates.

Project Folders

For emails with flexible deadlines.

Move forward button

Allows you to push a deadline one day or several with the click of a button.

RapidReplies

Pre-formulated, customizable emails for rapid responses.

InstantThanks

Click on a button to automatically send an email confirming that you have received an email from the sender. No need to open and close the email.

Add me to Bcc:

Add yourself in the Bcc: with a mouse-click in order to be able to add a Next Action to the email.

Insert Calendar

Insert your availability directly into an email with the click of a button.

Snow button (Camera icon)

Send a print screen of your Next Actions to a LeanMail trainer (for training purposes) or to your manager.

Training:

The following forms of training for LeanMail are available:

On-demand

- Video tutorials
- eLearning tutorials and complete training

Group

- Virtual and live
- Corporate complete training and coaching
- Ad-hoc complete training and coaching

Personal

- Virtual and live complete training and coaching

