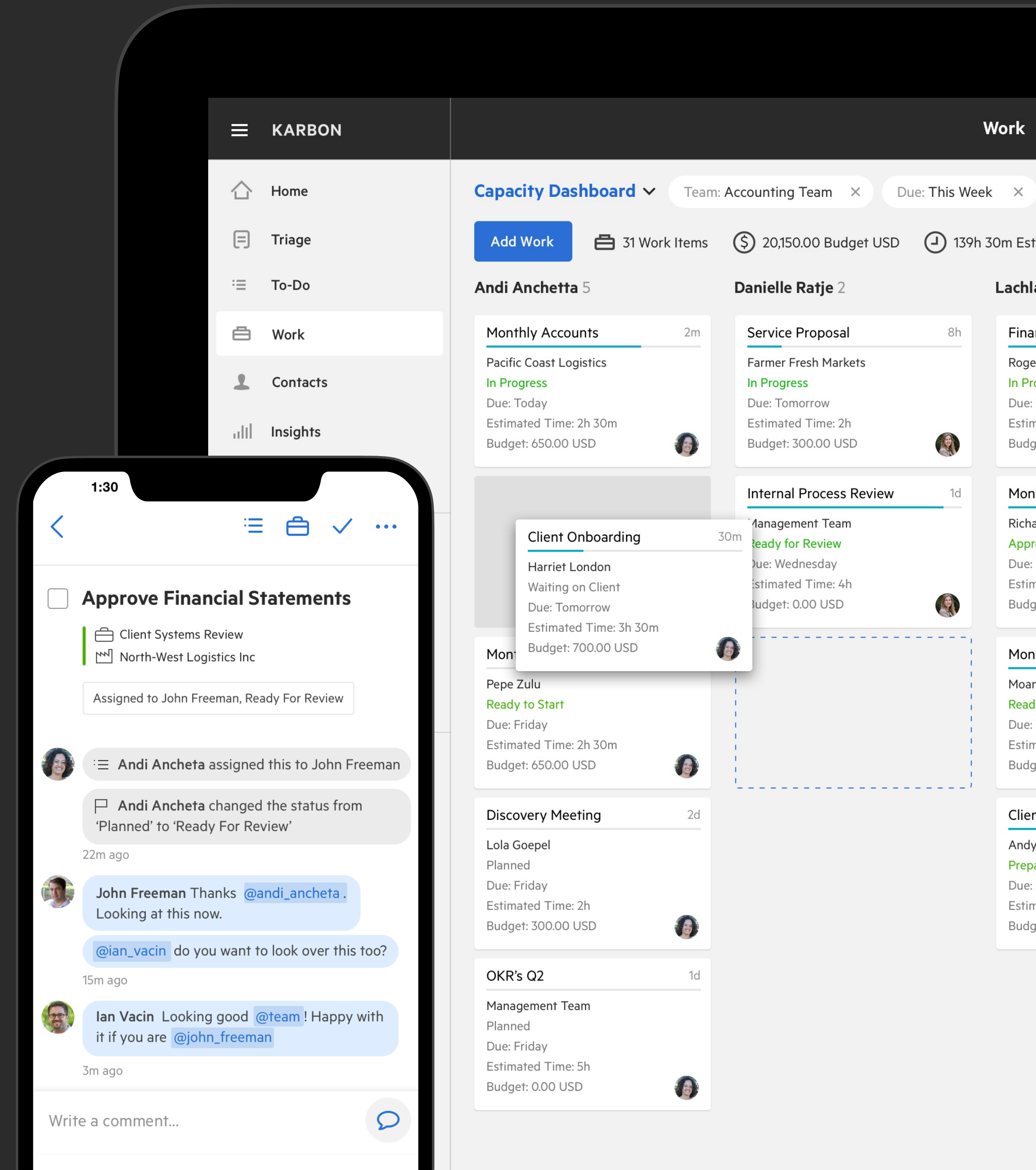




# Driving smarter communication habits with Email Insights

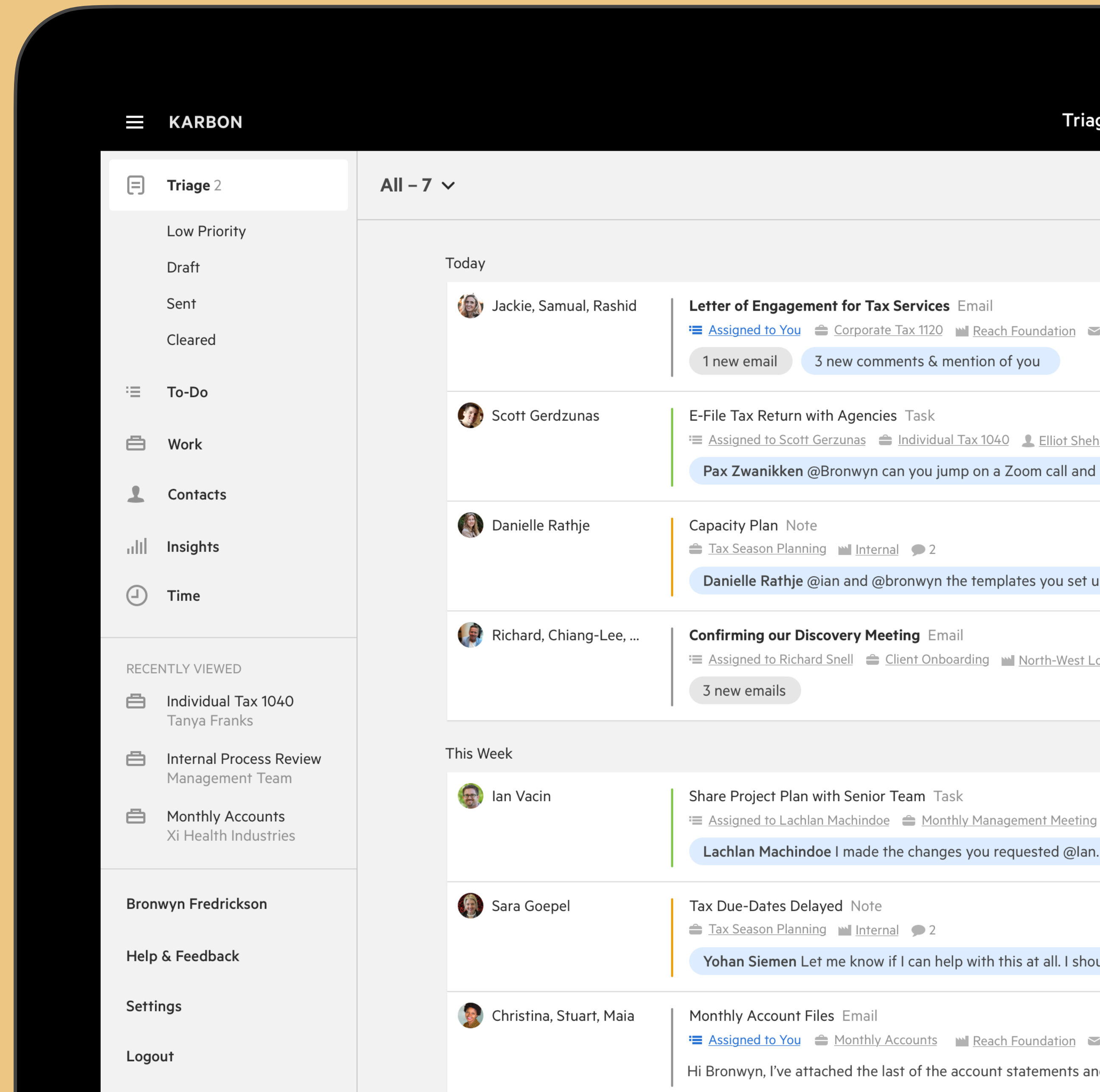
karbonhq.com





# Driving smarter communication habits with Email Insights

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# Meet your host

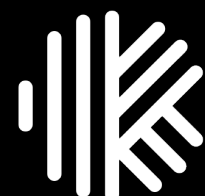


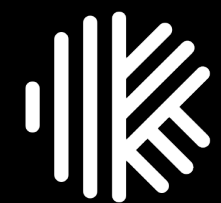
**Jake Lyman**

Karbon  
Account Executive



- 1. Close any open apps**
- 2. Ask and we'll answer**

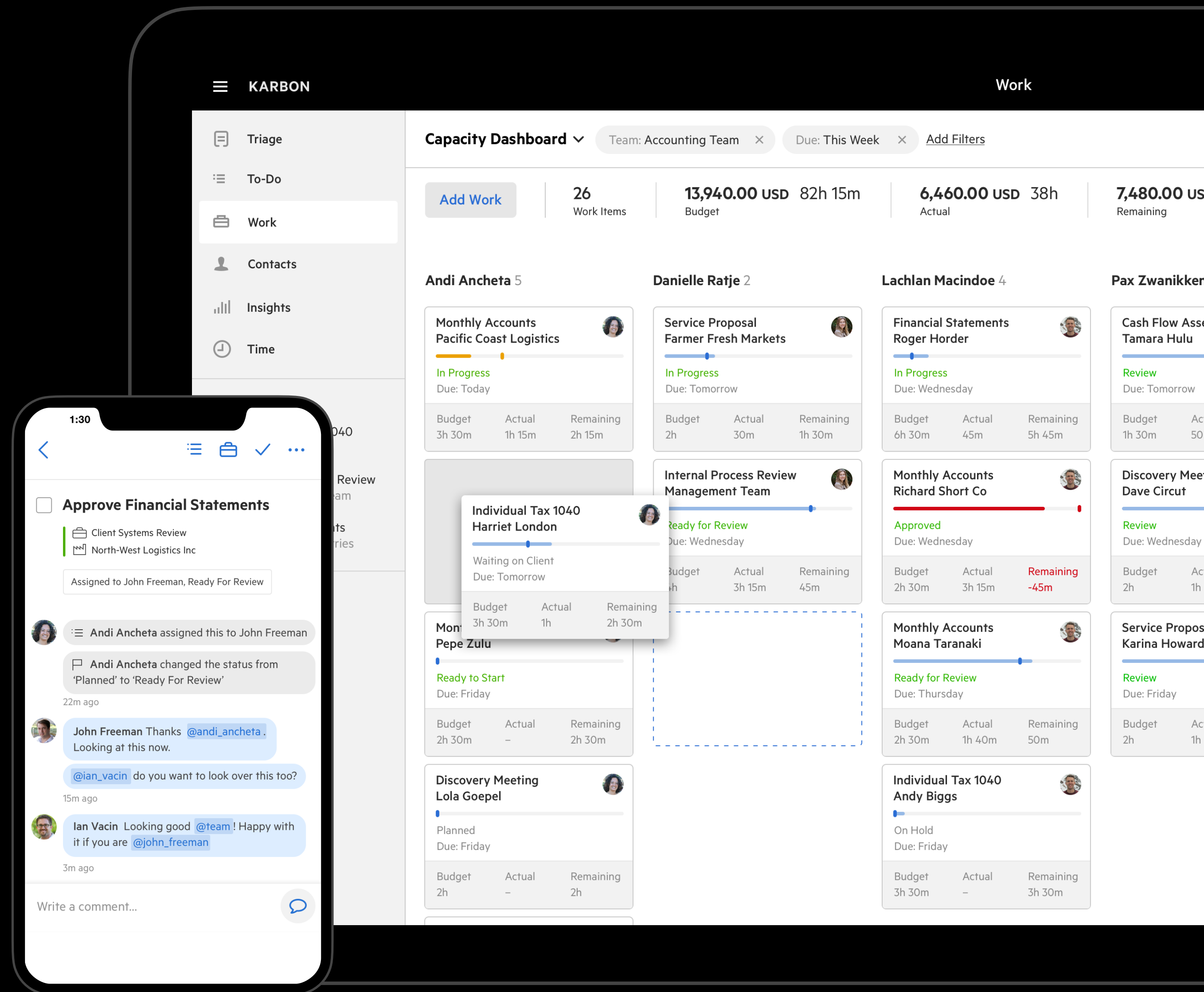




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



# Poll



# What is Email Insights?

- Reporting on your firm's email activity.
- Metrics on individual, team and client email efficiency and effectiveness.
- Identify opportunities to improve client service and save more time.
- Track changes over defined time periods.





# What does Email Insights show you?

- Daily email volume by client, employee and overall
- Average email response times
- How communication compares month-on-month
- Volume of communication with specific clients
- The email management habits of different staff
- Your busiest times of day for email





# How can your team use Email Insights?

- Guide team training to improve your customer experience
- Actionable data to help reduce time in Triage
- Which team members are not managing their Triage
- Effectiveness at anticipating client questions
- Understand your bad clients— those who over-communicate or are slow to reply back



# Demo



# Full access to Email Insights

- Product add-on
  - Free on the Enterprise Plan
  - \$10/User/Month (AU, CA, NZ, US)
  - £5/User/Month (UK)
  - Full-firm feature
- Free 14-day trial for your full team



# Limited access to Email Insights

- Free
- Each individual on your team can see their own email activity
- Data only for the current month
- No filters



# Questions



# Thank you

Get started at [karbonhq.com](https://karbonhq.com)

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

[jake@karbonhq.com](mailto:jake@karbonhq.com)

