

# Checklist: Are You Ready for Email Automation?

5 signs your team is losing time, context, and confidence without automated email logging

01

## Emails Aren't Consistently Logged

If this sounds familiar . . .

- Emails are logged manually (or not at all)
- Reps spend time on admin instead of customers



### Why it matters:

Manual logging creates gaps in CRM data that automation can close instantly.

02

## CRM Activity History Feels Incomplete

If this sounds familiar . . .

- Activity histories don't tell the full story
- Teams don't trust what's in the CRM



### Why it matters:

Email automation centralizes communication and creates a complete interaction history.

03

## Teams Rely on Siloed Inboxes for Context

If this sounds familiar . . .

- Important conversations live in personal inboxes
- Context is lost across teams



### Why it matters:

Automation logs emails automatically, giving everyone a shared, 360° view of customer engagement.

04

## Forecasts Lack Confidence

If this sounds familiar . . .

- Forecasts feel "off"
- Data gaps lead to missed insights



### Why it matters:

Consistent email logging improves CRM accuracy—making forecasts more reliable and defensible.

05

## Manual Work Dominates

If this sounds familiar . . .

- Reps toggle between inbox and CRM
- Logging activity steals time from real work



### Why it matters:

Automated tools like ExtendSync capture emails and events automatically—freeing teams to focus on growth.

**If you checked 2 or more boxes . . .**

It's time to turn your email into an advantage, not a blind spot.

### Help Your CRM Tell the Full Story

Email is where customer conversations actually happen—decisions, follow-ups, approvals, and context all start there. When that information stays locked in individual inboxes, teams lose visibility, alignment, and momentum.

With **ExtendSync**, email-to-CRM automation happens automatically. Emails, meetings, and activity are captured as work happens, timelines stay complete, and NetSuite reflects the full story—without extra steps or manual effort.

### The payoff is immediate:

- Cleaner, more trustworthy CRM data
- Faster execution across teams
- Stronger collaboration and visibility
- More confident forecasting
- Better customer experiences

If email matters to your business, it belongs in your CRM—automatically.

Get the guidance you need in our free ebook, *Inbox to CRM: The Ultimate Guide to Automating Email Sync for NetSuite with ExtendSync*.