

Get results fast

The quick start guide to email signatures with Exclaimer

**Quick setup, measurable
value, and outcomes by team**



How to use this guide

Getting value from Exclaimer doesn't take long. This guide shows you how to get results fast. Whether your priority is brand consistency, compliance, or personalization at a scale, we'll show you exactly how to get there.

With clear setup milestones, tailored benefits by department, and KPIs to track success, this guide is your shortcut to faster time to value.

Who is it for

Exclaimer supports teams across your organization, helping them all hit their **KPIs faster.**



- **IT admins** – Save time and cut support tickets with centralized control and automation.
- **Compliance officers** – Enforce 100% disclaimer coverage and reduce incident risk with built-in policy controls.
- **Marketing and brand teams** – Deliver brand consistency and campaign impact at scale, with no code required.
- **Sales reps and leaders** – Book more meetings and shorten sales cycles with personalized, timely messaging.
- **Customer Success managers** – Build stronger relationships and track sentiment in real time.
- **HR teams** – Improve engagement and personalize internal communications without IT dependency.

What's inside

This guide walks you through everything you need to achieve early success with Exclaimer:



- **Setup milestones** that help you go live quickly and with confidence.
- **Feature and benefit breakdowns** tailored to each department's goals.
- **Key performance indicators (KPIs)** to measure adoption, performance, and business impact.

Let's get started, and turn email into a smarter, more strategic channel.

Setup milestones

Follow these steps to configure your Exclaimer environment and quickly start delivering value to every team.



Milestone	What you do	Outcome	Est. time
Create your account	Fill in your personal and organizational details. Choose between Microsoft 365, Google Workspace, and Exchange on-premises.	Your account is ready to connect.	05-10 min
Configure your subscription	Connect to Microsoft 365, Google Workspace, or on-premises Exchange. Sync user details automatically from your directory. Choose server-side and/or client-side deployment.	Setup is completed. Exclaimer is connected and ready to populate email signatures with exact user details. You can centrally deploy email signatures once created.	10-20 min
Define your default brand	Set your organization's default fonts, colors, logos, and styling preferences.	Guarantee 100% brand consistency across all employee emails.	05-15 min
Create your first email signature	Use pre-designed templates or build your own using our drag-and-drop designer.	An on-brand, dynamic email signature template ready for deployment.	10-60 min
Manage signature rules	Define which users or groups receive which signatures. Set conditions based on sender, recipient, device, or date.	Accurate signature targeting; every user sends the right message at the right time.	05-20 min
Validate and test	Use preview mode and send internal test emails to verify signature layout, logic, and targeting rules.	Error-free deployment with accurate signatures across devices.	02-10 min
Launch	Deploy signatures across the organization.	Signatures are live; first value realized.	Same day
(Optional) Integrate with your tech stack	Connect to your CRM, meeting scheduling tools, and feedback platforms.	Streamline marketing campaigns, sales scheduling, and customer feedback.	10-60 min
(Optional) Enable role-based access controls	Set up RBAC to delegate signature management to other teams without needing IT.	Teams manage their own updates safely, reducing IT burden and accelerating updates.	05-15 min

Value by team: Benefits, features, and KPIs

Explore the value Exclaimer delivers across departments. Each section outlines the key benefit, feature used, relevant teams, and the KPIs to track for measuring success.

IT & Compliance

Benefit	Feature	Team	KPIs
Save time and guarantee consistency	<ul style="list-style-type: none"> – Centralized Management – Automation – Directory Sync 	<ul style="list-style-type: none"> – IT – Compliance 	<ul style="list-style-type: none"> – 100% of mailboxes sending emails with centrally controlled signatures – Time spent updating signatures
Ensure all emails meet legal and regulatory standards	<ul style="list-style-type: none"> – Disclaimers – Audit Log 	<ul style="list-style-type: none"> – IT – Compliance 	<ul style="list-style-type: none"> – 100% disclaimer coverage – Compliance incident rate
Delegate safely. Let other teams update signatures.	<ul style="list-style-type: none"> – Role-Based Access Controls (RBAC) – User Details Editor 	<ul style="list-style-type: none"> – IT – Compliance 	<ul style="list-style-type: none"> – Reduction in IT support tickets – Reduction in update requests from other teams

Marketing

Benefit	Feature	Team	KPIs
Ensure every email reflects a consistent, professional appearance	<ul style="list-style-type: none"> – Signature Designer – Branding 	<ul style="list-style-type: none"> – Marketing – IT 	<ul style="list-style-type: none"> – 100% coverage of mailboxes – 100% brand conformity
Run promotions and campaigns	<ul style="list-style-type: none"> – Campaigns – Promo Banners – Rotating Banners – Analytics – CRM Integrations 	<ul style="list-style-type: none"> – Marketing 	<ul style="list-style-type: none"> – Banner sends – Banner clicks – Email signature engagement rate
Align with ABM campaigns	<ul style="list-style-type: none"> – CRM Integrations 	<ul style="list-style-type: none"> – Marketing 	<ul style="list-style-type: none"> – Increase in account CTR – Reduced time to conversion – Increase in meetings booked
Drive traffic to your social channels	<ul style="list-style-type: none"> – Social Media Icons – Social Feeds – Analytics 	<ul style="list-style-type: none"> – Marketing 	<ul style="list-style-type: none"> – Social media sends – Social media clicks – Social media engagement
Update banners and content without IT	<ul style="list-style-type: none"> – RBAC – Drag-and-Drop Editor – Campaigns 	<ul style="list-style-type: none"> – Marketing 	<ul style="list-style-type: none"> – Time to update assets – Banner refresh frequency



Sales

Benefit	Feature	Team	KPIs
Make it easy for prospects to book meetings directly from every email	<ul style="list-style-type: none"> - Appointment Booking Integrations 	<ul style="list-style-type: none"> - Sales - Customer Success 	<ul style="list-style-type: none"> - Increase in meetings booked - Avg. time to booking
Offer content personalized to the prospect and their place in the funnel	<ul style="list-style-type: none"> - Campaigns - Promo Banners - Rotating Banners - CRM Integrations - Client-Side Deployment 	<ul style="list-style-type: none"> - Sales - Customer Success 	<ul style="list-style-type: none"> - 100% disclaimer coverage - Compliance incident rate

Customer Success

Benefit	Feature	Team	KPIs
Collect real-time customer sentiment	<ul style="list-style-type: none"> - One-click Surveys 	Customer Success	<ul style="list-style-type: none"> - Improved NPS - Survey response rate
Highlight new product releases, updates, and use case guides	<ul style="list-style-type: none"> - CRM Integrations - Campaigns - Rotating Banners 	Customer Success	<ul style="list-style-type: none"> - Higher CSAT - Time to resolve tickets

HR

Benefit	Feature	Team	KPIs
Empower employees to add details like working hours or preferred pronouns	<ul style="list-style-type: none"> - RBAC - User Details Editor 	HR	<ul style="list-style-type: none"> - % of profiles with personalized info - Increase in employee satisfaction
Promote key internal events and initiatives	<ul style="list-style-type: none"> - Rotating Banners - Campaigns - Recipient Rules 	HR	<ul style="list-style-type: none"> - Banner CTR - Event attendance and participation

You're ready to go

You've now seen how Exclaimer delivers measurable impact.

No matter your goal, this guide has walked you through the steps that matter most.

Get up and running fast and see value with Exclaimer from day one.

Your quick success checklist

Use the checklist below to make sure you've completed the essentials and are on track to achieve your KPIs:

Connected your directory and configured email routing

Set brand defaults (logo, font, colors)

Created your first dynamic email signature template

Applied and tested signature rules

Launched across your organization

Integrated with CRM, meeting, or survey tools (if applicable)

Enabled role-based access control (optional but recommended)



Need support?

We're here to help you go further, faster.

- **Chat with us:** exclaimer.com/support
- **Browse our Knowledge Base:** support.exclaimer.com
- **Learn best practices:** exclaimer.com/resources
- **Contact your Customer Success Manager**
for strategic guidance tailored to your goals

