monday academy

Client communication in monday CRM Cheatsheet

Stay focused, follow up, and never miss a message

Core communication pain points

Need to remember what was said — and when?

Use the **Emails & Activities** tab to keep every email, call, and meeting note in one place — so you always have the full context and your team stays aligned.

Email groups, without losing the personal touch

Use **Mass emails** to send personalized messages to filtered contacts, and get help from monday's **AI assistant** to write and refine them faster.

Struggling to stay consistent with follow-ups?

Use **Sequences** to automate outreach over time — so no warm lead is forgotten, even when your to-do list is full.

Not sure if your emails are working?

Check **email tracking** to see who opened and clicked — so you know where to focus your next follow-up.

✅ Want to keep communication clear, personal, and effective?

Follow these monday CRM best practices:

- **Filter contacts before sending — only email who needs to hear it**
- **Personalize with name or company for a more tailored feel**
- **Keep emails short and focused**
- **Space out messages to avoid over-sending**
- **Log every interaction to keep your team aligned**