

Quick Guide to Mail Merge

Candidate outreach can be time consuming and tedious. Messaging several candidates at once through email can gauge interest in the position and save time. Microsoft's Mail Merge feature is a simple way to efficiently send personalized mass emails.

Follow this step-by-step guide to become a Mail Merge expert and reduce time-to-hire by connecting with more candidates in less time.

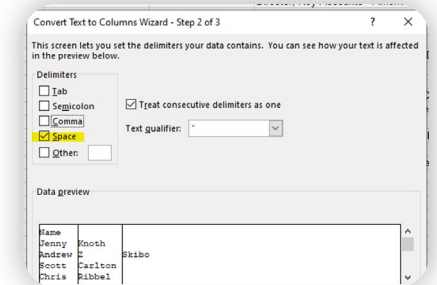
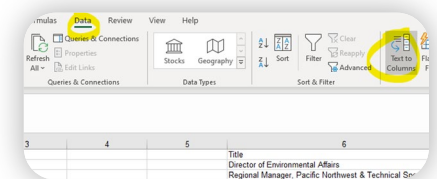
1. Prep Your Spreadsheet

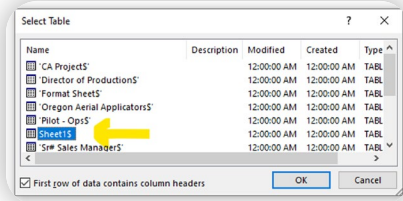
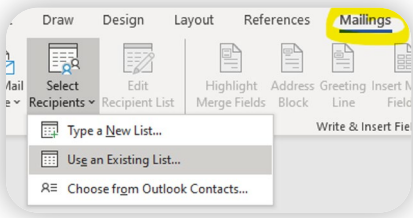
If you are using Google Sheets or an on-line (live) spreadsheet, download the spreadsheet to Microsoft Excel.

Separate the data (**text to columns** is a great feature) so only one piece of data is in one cell.

Double check capitalization and spelling. If you plan to use the candidate's current job title and company in the body of your email as a part of personalization, pay extra attention that the data in these cells is correct. Be sure to save when your spreadsheet is clean and ready!

Pro Tip: Add your own name, company and title to use as a test run!





2. Prep Your Word Document

Open a new blank document in Microsoft Word.

Under the Mailings tab, choose Select Recipients.

On the dropdown menu, click Use an Existing List, and choose the spreadsheet you just cleaned and saved.

You will be redirected to the blank word document.

3. Match Your Fields

Return to the Mailings tab, choose Greeting Line.

In the dropdown boxes, choose the greeting that best suits your style.

Pro Tip: Keep it casual.

Choose “Hi” for greeting and “Joshua” for name so your email will have an informal feel and have a greater chance of being read by your candidate.

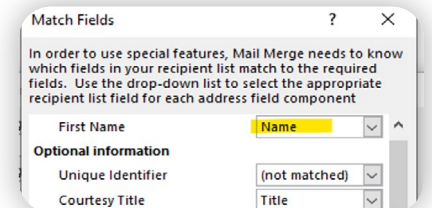
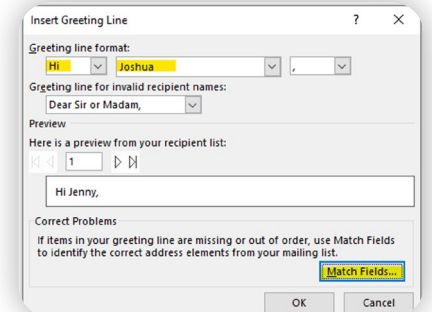
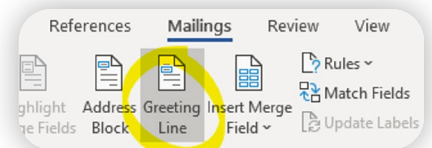
Select Match Fields.

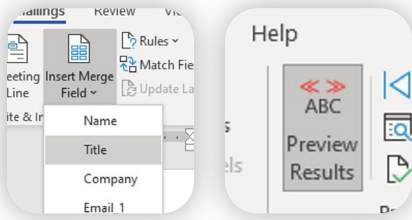
You will be directed to match your fields with the columns in your spreadsheet.

Match all the fields you will use in your messaging (be sure to include email), and then click OK.

You will be redirected to your document.

“Greeting Line” will be at the top of the document.

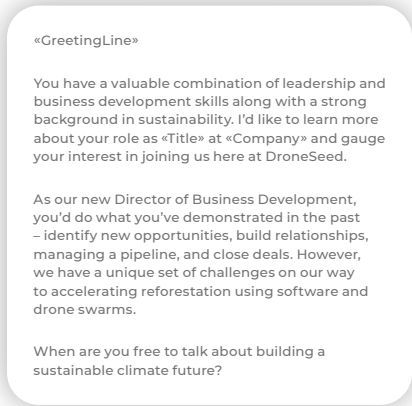




4. Craft Your Message

Using your best outreach messaging, write a compelling and personal message to the candidate that references the new opportunity and the candidate's current position and company.

Need Help? Check out our Blog: [The Best Emails to Improve Candidate Response Rate.](#)



As needed and where appropriate, under the Messaging tab, click Insert Merge Field, and choose "Title" or "Company" or any other fields you have chosen to use to best personalize your outreach.

Click Preview Results from the ribbon at any time during the creation of your message to see the results of your merge.

Add your professional email signature (include all your contact data, single spaced) to the bottom of your document.

5. Mail Your Message

Go to the Mailings tab and choose Edit Recipient List on the ribbon.

TEST FIRST! Deselect all recipients except yourself and follow the instructions below to send the message to yourself.

Once you've determined the merge works as you expected and you've triple checked for spelling and accuracy, repeat the process by selecting all recipients.

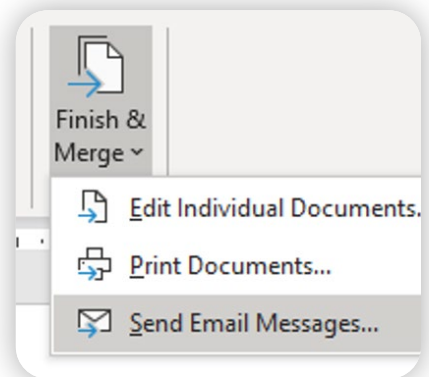
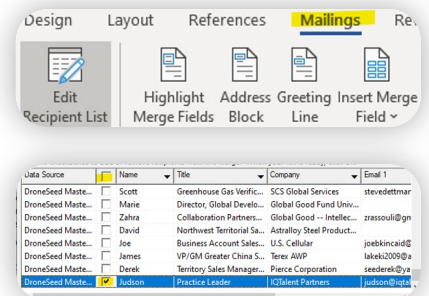
Preview the message.

Select the Finish and Merge tab and then Send Email Messages from the dropdown menu.

Select the appropriate label for the column that contains your primary email addresses from the 'To:' dropdown list.

Compose a fabulous subject line, and ensure Mail format is set to HTML.

Ensure All is selected under Send Records, then click OK.



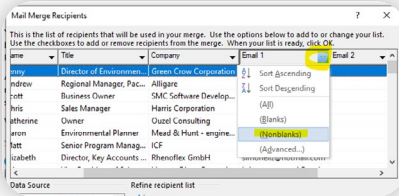
Hi Judson,

You have a valuable combination of leadership and business development skills along with a strong background in sustainability. I'd like to learn more about your role as Practice Leader at IQTalent Partners and gauge your interest in joining us here at DroneSeed.

As our new Director of Business Development, you'd do what you've demonstrated in the past – identify new opportunities, build relationships, manage a pipeline, and close deals. However, we have a unique set of challenges on our way to accelerating reforestation using software and drone swarms.

When are you free to talk about building a sustainable climate future?

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6. Check Your Message

Navigate to your inbox and ensure you received the test message.

Review the email for errors or formatting issues.

When you've confirmed your email is clear of errors and formatted correctly, navigate back to your Word document.

Select Edit Recipient List from the Mailings tab.

On the Primary Email Column, choose (Nonblanks) from the dropdown menu.

Select All Recipients.

Preview Results.

Repeat the mailing process above.

Check your Sent Items folder in your email to ensure the messages were sent successfully.

Success!

A successful mail merge will allow you to gauge interest in the open role quickly and easily. Download your curated list of top candidates from IQTX and send a message to every candidate in minutes.

Let Us Handle the Outreach

Still too busy to manage all the outreach, hiring, and onboarding?

Consider 30 days of sourcing with IQTalent Xchange, and let us handle the initial outreach for you.

Visit iqtalentxchange.com to get started!