LPM

Google Review Request System Setup

What you're building

A one-time setup. After that, the same two steps every time a job wraps up:

1. Add the customer's name and email to the spreadsheet.
2. Run the mail merge in YAMM.

YAMM (Yet Another Mail Merge) sends only to the new rows, fills in each name automatically, and marks each row as sent.

Before you start

- The business has a verified Google Business Profile and its review link (SOP-005).
- A Gmail account that will send the requests.

Step 1: Write the email template in Gmail

Screens: slides 2 and 3.

1. Log into Gmail and select Compose.
2. Write the template below. Wherever the customer's name goes, type **{{Name}}** exactly. It must match the column header in the sheet.
3. Close the draft. Gmail saves it to Drafts automatically.

Template (replace the bracketed parts):

Subject: Thanks for choosing [Business Name]!

Hi {{Name}},

Thanks again for choosing [Business Name]. I hope the [service] gave you the results you were hoping for. If you have sixty seconds, a quick Google review would mean a lot and helps other folks nearby find us.

Here's the link: [Google review link]

Thanks again {{Name}},

[Owner names]

[Business Name]

[Email] · [Website] · [Phone]

Step 2: Create the sheet

Screens: slides 4 to 6.

1. While logged into Gmail, open Google Apps and select Sheets.
2. Name the document.
3. In row 1, enter two headers only: **Email** and **Name**. No titles or other text in row 1.
4. Sheets saves to Google Drive automatically. Move it to the folder you want.

Once installed, YAMM adds and maintains a merge status column by itself.

Step 3: Install YAMM

Screens: slides 7 and 8.

1. In the sheet, select Extensions, then Add-ons, then Get add-ons.
2. Search for "yamm" (Yet Another Mail Merge) and install it.
3. Choose Individual install, use Select all to allow the full permissions, then Allow. This is normal: YAMM needs it to read the sheet and send from Gmail.

Step 4: Send a test first

1. Add a row with your own name and email.
2. Select Extensions, Yet Another Mail Merge, Send test emails.
3. Check that the name fills in correctly and the review link works.
4. Delete your test row before Step 5. A test send does not mark the row as sent, so the mail merge would email you again.

Step 5: Send the requests

Screens: slides 9 and 10.

1. Select Extensions, Yet Another Mail Merge, Start Mail Merge.
2. YAMM sends only to rows not yet sent. Rows whose merge status says email_sent are skipped.

The routine after setup

1. After each job, add a new row: the customer's name and email. Several new rows at once are fine.
2. Run the mail merge. Only the new rows go out.

If something looks off

- **The menu only shows Help:** refresh the page and try again.
- **The name didn't fill in:** check the header matches {{Name}} exactly, with no title text in row 1.
- **Out of sends for today:** the quota refills 24 hours after your last send, not at midnight.

Questions anytime

Text or call Chris. Happy to walk through the first one together.
(905) 963-0800
Christopher.Morewood@launchpadprojectmanagement.com
Christopher Morewood, PMP® · Launchpad Project Management · launchpadprojectmanagement.com

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