

Referral Email V1

Subject line: [RELEVANT TOPIC, e.g. Sales ops; Demand generation; Product management] at {{lead.name}}

Hi {{contact.first_name}},

My name is [my name] and I head up business development efforts with {{organization.name}}. We recently launched a new platform that [ONE SENTENCE PITCH].

I am taking an educated stab in the dark here, however based on your online profile, you appear to be an appropriate person to connect with ... or might at least point me in the right direction.

I'd like to speak with someone from {{lead.name}} who is responsible for [HANDLING SOMETHING THAT'S RELEVANT TO MY PRODUCT].

If that's you, are you open to a fifteen minute call on [TIME WITH TIMEZONE AND DATE] to discuss ways the {{organization.name}} platform can specifically help your business? If not you, can you please put me in touch with the right person?

I appreciate the help!

Best,
{{user.first_name}}

Referral Email V2

Subject line: Who is in charge of [RELEVANT TOPIC, e.g. Sales ops; Demand generation; Product management] at {{lead.name}}?

Hi {{contact.first_name}},

I hope I'm not bothering you. Could you please refer me to the person in charge of [something that's relevant to my product]?

Thanks for your time,
{{user.first_name}}

Referral Email V3

Subject line: Question about [RELEVANT TOPIC, e.g. Sales ops; Demand generation; Product management]

Hi {{contact.first_name}},

My name is [my name] and I'm with {{organization.name}}. We work with organizations like {{lead.name}} to [INSERT ONE SENTENCE PITCH].

[One sentence unique benefit].

Could you direct me to the right person to talk to about this at {{lead.name}} so we can explore if this would be something valuable to incorporate into your events?

Cheers,
{{user.first_name}}

Referral Email V4

Subject line: Appropriate Person?

Hi {{contact.first_name}},

I'm sorry to trouble you. Would you be so kind as to tell me who is responsible for [INSERT YOUR BIGGEST PAIN POINT HERE THAT RESONATES WITH YOUR IDEAL CUSTOMER; OR INSERT FUNCTION LIKE SALES OR RECRUITING] and how I might get in touch with them?

Thank you,
{{user.first_name}}

Schedule a Call Email V1

Subject line: 15 mins on [DATE]

Hi {{contact.first_name}},

I hope this email finds you well! I wanted to reach out because [EXPLAIN HOW YOU GOT THEIR CONTACT INFORMATION AND HOW YOU RELATE TO THEM: TALKED TO A COLLEAGUE, SAW YOUR COMPANY ONLINE, ETC.].

{{organization.name}} has a new platform that will help (your team at) {{lead.name}}. [ONE SENTENCE PITCH]. We do this by:

Benefit/feature 1

Benefit/feature 2

Benefit/feature 3 (optional)

Let's explore how {{organization.name}} can specifically help your business. Are you available for a quick call [TIME WITH TIMEZONE AND DATE]?

Cheers,

{{user.first_name}}

Schedule a Call Email V2

Subject line: Your [GOAL/TARGET, e.g. sales goal for Q4]

Hi {{contact.first_name}},

I hope this email finds you well! I wanted to reach out because [explain how we got their contact information and how we relate to them: talked to a colleague, saw your company online, etc.].

{{organization.name}} has a new platform that will help (your team at) {{lead.name}}. [ONE SENTENCE PITCH]. I know that {{organization.name}} will be able to help {{lead.name}} [INSERT HIGH LEVEL BENEFIT HERE].

Are you available for a quick call [TIME WITH TIMEZONE AND DATE]?

Cheers,

{{user.first_name}}

Intro Sales Email

Subject: {{lead.display_name}} + {{organization.name}}

Hi {{contact.first_name}},

My name is {{user.first_name}} with {{organization.name}}.

We help law firms store & manage all of their client data securely in the cloud. I wanted to learn how you handle data storage at {{lead.display_name}} and show you what we're working on.

Are you available for a quick call tomorrow afternoon?

Cheers,
{{user.first_name}}

The Follow Up Email

Subject: {{organization.name}} Follow Up

Hi {{contact.first_name}},

Friendly follow up.

I wanted to show you how {{organization.name}} can help you [THAT THING YOUR PRODUCT/SERVICE HELPS YOU WITH]. Do you have a few minutes for a quick call later this week?:

Wed @ 11AM PST
Thur @ 2PM PST
Fri @ 3PM PST

Cheers,
{{user.first_name}}

The Quick Feedback Email

Subject: Quick feedback?

Hi {{contact.first_name}},

Hope all is well.

We just launched [X NEW FEATURE]. Here's more information about it: [LINK TO NEW FEATURE]

Do you think it will help you [THE BENEFIT: SAVE TIME/SAVE MONEY/MAKE MORE MONEY/REDUCE PAIN] with [SPECIFIC THING THAT THEY DO]?

Cheers,
{{user.first_name}}

Following Up with a Lost Opportunity

Subject: Quick {{organization.name}} update

Hi {{contact.first_name}},

Hope all is well.

Last time we spoke, you didn't think {{organization.name}} was a good fit because [REASON WHY THEY DIDN'T CLOSE].

The good news is that we now [NEW FEATURE OR SERVICE THAT ADDRESSES THEIR CONCERN]. Based on our past conversations, I think we're in a better position to [HELP WITH WHATEVER YOUR PRODUCT DOES].

Cheers,
{{user.first_name}}

Following Up with an Opportunity That Disappeared

Subject: Are we still moving forward?

Hi {{contact.first_name}},

Friendly check in.

Last time we spoke, we said that we were [NEXT STEP IN THE SALES PROCESS].

How can I help move things forward?

Cheers,
{{user.first_name}}

The “I Just Called” Email

Subject: Today's Call

Hi {{contact.first_name}},

I just tried giving you a call.

Do you have a few minutes to catch up later this week?:

Wed @ 11AM PST

Thur @ 2PM PST

Fri @ 3PM PST

Cheers,
{{user.first_name}}

The “What Else Do We Need?” Email

Subject: What else do we need?

Hi {{contact.first_name}},

Hope all is well.

When we first spoke, you said that we need to:

[OBJECTION A]

[OBJECTION B]

[OBJECTION C]

Do you think we've done those things? What else do we need to move forward this week?

Cheers,

{{user.first_name}}

Asking for the Close

Subject: Let's get started

Hi {{contact.first_name}},

We're all set. Here's what I'll need from you to get you set up:

Onboarding Item 1

Onboarding Item 2

Onboarding Item 3

Do any of these times work for a set up call? Feel free to include your team:

Wed @ 11AM PST

Thur @ 2PM PST

Fri @ 3PM PST

Cheers,

{{user.first_name}}