Follow-up email templates collection

Woodpecker

Follow-up Email
Templates Collection

Coming up with a follow-up email copy may be a tough nut to crack for beginners, but I'm taking the hard work out of it for you. Unlike other ebooks about follow-ups, this one is a collection of templates for contacting inbound leads and customers. Each template is presented with its use context and followed by a short commentary. I encourage you to treat the templates as an inspiration for creating your own follow-up email copy.

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TEMPLATES FOR FOLLOWING UP

WITH INBOUND LEADS

How to follow up with inbound leads?

Before you start following up with an inbound lead you need to take a moment to analyze their buying journey. Investigate how they came across your website and what steps they took before reaching out to you or signing up for a demo. Such insight will help you understand their current mindset about your product to better adjust the communication.

Also, before reaching out to such a warmish lead, research their company's website and LinkedIn profile. Get to know the scope of their business, their team size, investigate their market situation and find out more about their target group. This will build a context that is crucial for you to properly identify their needs and challenges their business is facing.

Think about it - a person who came across your ad in google search and filled out a lead form on your website won't be as familiar with your product or service as someone who dug through your blog first, and then downloaded an ebook or joined a webinar.

Whatever the scenario, always try to get into your inbound leads' shoes and imagine their point of view. Warm, or warmish, leads are not all equal and ought to be segmented according to different criteria.

Let's analyze some of the scenarios and follow-up templates that you could draw inspiration from while creating your own lead nurturing campaigns.

Case 1

Follow-up after a webinar

Background: The marketing team in your company organized a webinar on how your leads can improve their workflow thanks to your app. There's been a lot of questions about how to customize your app to individual needs. It's a great opportunity to take over these inbound leads and nurture them further down the sales funnel.

Opening mail

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Subject: Here's something for you

Hi {{First_Name}},

Thank you for joining the webinar. The materials and a link to the recording will be sent to you shortly. In the meantime, click the link below to get a step-by-step checklist that will help you implement the sales process improvements we discussed yesterday.

Grab a free checklist >>

I got a lot of questions about the ways you can customize our software to better serve your business needs. If you'd like to know more about it, let's schedule a quick, 15-minute-long meeting -- how about this Wednesday?

<SIGNATURE>

Follow-up

● ● ●

Hello {{First_Name}},
Did you manage to complete the first task from the checklist?

It may seem pretty time-consuming to implement, but here's the hack:
you can cut the time by half using the "auto-populate" option in our app.

P.S.

You can also use the custom {{Snippet_1}} option to {{Snippet_2}}. Let me guide you through the set-up process to create a solution that will improve your workflow -- are you available for a 15-min chat on Wednesday?

<SIGNATURE>

## What's the approach?

You can tell that the leads who signed up for a webinar are interested in your product -- they dedicated a lot of their time to learn about it. Perhaps what stops them from buying yet is the uncertainty whether your solution will match their needs or suit their workflow. Will it seamlessly integrate with other software they already use? Will it suffice to cover the whole process?

Make solving all possible doubts a focal point of your communication. Offer expert advice. Anticipate to answer detailed questions about particular use cases or to explain the technical aspects of the product.

How to structure the copy?

- Come up with an intriguing subject line that will encourage the recipients to open the email. In this case, the subject line sparks curiosity to find out what's waiting inside.

- Nurture the leads with additional materials – it can be a checklist, an ebook, or a collection of blog posts for an additional read. Choose something you could use as a hook for further conversation.

- Use the problem-solution pattern. Highlight how your product or service can make a given process easier, faster or more efficient.

- Your CTA should reflect the main goal of your message, be it a call invite or a demo signup. Precise your request giving the time and duration of the meeting.
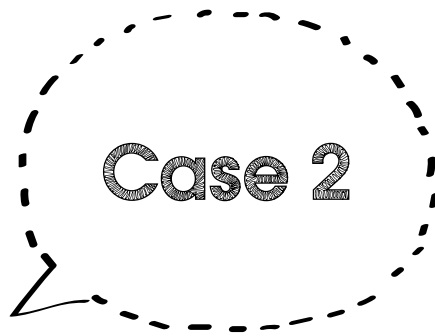
Follow-up after an AMA session

Background: The marketing team in your company prepared an ask-me-anything session with an industry expert. Many of the participants were very interested both in the discussion topic as well as the way your product may help them reach their business goals.

After identifying the prospects who match your ICP, you scheduled a post-AMA follow-up campaign to offer them advice and guidance on choosing the right solution.

Opening mail

Subject: Question

Hi {{First_Name}},

Thank you for your participation in the AMA session yesterday. I hope the discussion helped you get a better picture of how to automate sales processes in your company and make your workflow more effective.

If you're still not sure what solution would work best for you, I'd love to chat with you about your business needs and help make the right choice.

Would you be available for a call the upcoming Tuesday or Thursday?

<SIGNATURE>

Follow-up

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Hi again {{First_Name}},
Do you know what question I got most often after the AMA session?
"How to prevent lead loss when there are limited resources in the company?"

Does your company face the same challenge? Let's talk about how you could change your workflow with a suitable solution. What does your schedule look like on Tuesday or Thursday this week?

<SIGNATURE>

What's the approach?

This scenario is similar to the webinar follow-up campaign. The leads who took part in the AMA session perceive you as an authority in your niche through the prism of the thought leader. They may be considering buying your product, but they won't seal the deal until all their questions and doubts are resolved.

Your role is to be the advisor and a guide for them. Clear up their doubts and show them how the product can improve their workflow.

How to structure the copy?

- Create an attention-sparking subject line. Sometimes just one word can do the trick.

- Use a question as a conversation hook. Choose one that is mind-boggling for your target group, so they will feel the urge to learn the answer.

- Don't miss the main goal of your email that is to get your prospects engaged in a 1-on-1 conversation. Take the initiative and propose a meeting time upfront.

Case 3
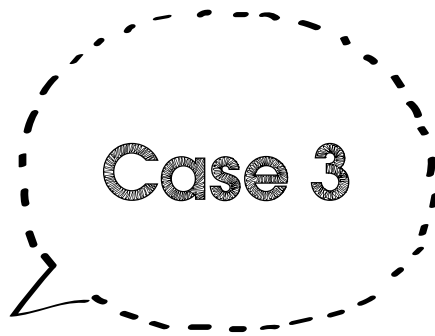
Follow-up after a chatbot conversation

Background: You implemented a chatbot on the pricing page to help customers choose the best solution for them by asking specific business-related questions. If it turns out that a prospect needs custom-made software, you or one of your sales team members follow up with the prospect to discuss the details.

Let's see how an example follow-up sequence could look like in this case:

Opening mail

● ● ●

Subject: Improve your customer management by {{Snippet_1}}

Hi {{First_Name}},

Thanks for reaching out the other day! I'd love to learn more about the internal processes in your team, so we could create a tailored-made solution just for you. How about a quick call on Thursday?

P.S. Have a look at a special project we've recently prepared for {{Industry_ Leader_Name}} that allowed them to reduce the time of customer management by {{Snippet_2}}:

Click here to read the case study >>

<SIGNATURE>

Follow-up

● ● ●

Hi again {{First_Name}},

I have another case study to share with you. One of our recent customers struggled with ineffective customer management due to a CRM system unfit for their complex needs. We created a custom-made solution for them that almost immediately made their workflow more effective.

Read the full story here >>

Are you ready to get your customer management to the next level? How about a quick chat on Thursday?

<SIGNATURE>

What's the approach?

In this case, a lead is looking for advice on what solution to choose. It may suggest that they are almost at the end of their buying journey and are very close to making the purchase. Such type of a lead is already well educated on the topic. They need expert advice to make the right choice.

Your goal is to dig down into their needs and offer a solution that will make their work more effective. Mind you -- such leads may be comparing your product with other available options on the market at the same time, so you should act quickly.

How to structure the copy?

- Add a postscript to smuggle additional lead nurturing materials, like a case study. A "P.S." is a clever way to mention information that is not directly related to the rest of the message. Moreover, it grabs the attention of someone who only skims the content of the message as it stands out a tad from the surrounding text.

- Make sure the case study is relevant to the lead – it may feature a customer from the same industry or a company with a similar business model. If possible, mention a big player or your lead's competitor. Social proof is a powerful trust-building factor.

Case 4
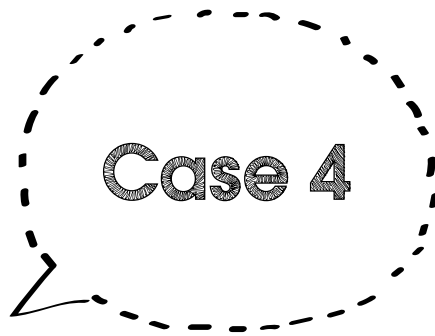
Follow-up after ebook download

Background: Your marketing team prepared a beginner's step-by-step guide that explains how your leads can improve a certain process in their company with the help of your software.

You or your sales team members browse the list of leads who signed up for an ebook to identify the ones who meet your Ideal Customer Profile criteria. Below is an example of a follow-up sequence you could create:

Opening mail

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Subject: Is your CRM process effective?

Hi {{First_Name}},

You've recently downloaded "How to Effectively Manage Customer Relationships in a Small Company" ebook.

I believe that an efficient and streamlined customer relationship management process is the key to gaining loyal customers and further business growth.

It's difficult to achieve it without a solution that matches your workflow, though.

I'm reaching out to set up a quick meeting to discuss how our software can allow you to more effectively handle your customer relationship management process in your company.

How does your calendar look like on Monday or Tuesday to learn more?

<SIGNATURE>

Follow-up

● ● ●

Hi again {{First_Name}},

Did you find the guide helpful? It's time to put the knowledge into practice!

Did you know that by automating some of the tasks you can improve your overall conversion? {{Industry}} companies, just like yours, can achieve more {{Snippet_2}} thanks to efficient customer management.

I'd like to show you how you could better track your pipeline, cut out lost deals and prevent churn. If Monday and Tuesday don't fit your schedule, how about Thursday or Friday?

<SIGNATURE>

What's the approach?

The main idea here is that the marketing leads can be turned into sales leads. People who downloaded an ebook with tips on how to improve some process are clearly looking for an alternative to their current solution. They are warm enough to be handed over to the sales team, who will nurture them further down the sales funnel.

How to structure the copy?

- Come up with a subject line that targets the need for changing the process or solution your prospect may have. A subject line that focuses on a need promises value that the prospect can get from the email. Addressing the need may turn out to be the trigger for your prospect to open the message from you.

- Read more about what's great about focusing on needs while crafting a subject line:
  [We've Examined Best Subject Lines, Here's What We Discovered >>](#)

- Stress how your solution can help your prospect achieve their goals faster and in a more effective way. Use your product's value proposition that best answers the needs of this particular segment.

- Provide them with some benchmark info to create the fear of missing out on opportunities in comparison to their competitors. Use the power of numbers to grab their attention.

Case 5
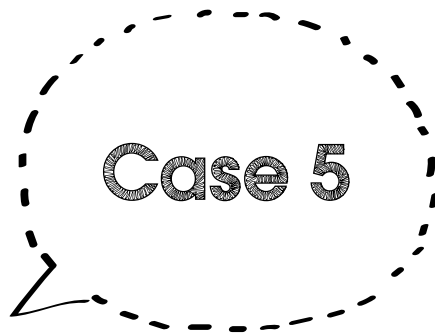
Follow-up after form submission

Background: A lead came across your digital marketing agency while searching for ways to increase their website traffic. They explored your website and got familiar with your offer. They would like to know more details about your service, so they filled out a contact form on the website and expect to get some expert advice.

Here's an example of how your follow-up sequence could look like:

Opening mail

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Subject: Let's increase your site traffic

Hello {{First_Name}},

Thank you for your interest in our services. Based on the inquiry form you submitted, I would like to discuss with you the optimal solutions that would fit {{Company_ name}}'s needs best.

Would you be available for a phone meeting on Monday or Wednesday next week?

<SIGNATURE>

Follow-up

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Hi {{First_Name}},

I'd like to share with you the results of a project we did for a company facing similar challenges to yours - follow this link to read the case study >>

After implementing the strategy prepared by {{First_Name_Of_Your_Employee}}, the company noted an impactful boost in site traffic, which translated into more conversions.

Let's discuss how we can improve your online visibility and attract more customers to your website. If neither Monday nor Wednesday fits your busy schedule, below is a link to my calendar, so you can pick a more convenient time for yourself.

Schedule a meeting now >>

<SIGNATURE>

What's the approach?

The person who submitted a contact form on your website probably stumbled upon your page while googling a solution to their business problem. They browsed through the page, perhaps read a few blog posts and so became interested in your service.

In such case, you should take an attitude of an advisor, rather than a salesperson. Listen carefully to their story, find out what their biggest business challenge is, and then propose the right solution. Be the guide they need.

How to structure the copy?

- The email subject line, as in the above example, is a promise that inside they will find the solution they are looking for.

- Make the opening email precise – the main point should be an invitation for a chat. Don't make an offer straight away. Ask for a call to listen to your customer's needs and expectations.

- A follow-up should bring some relatable examples to the table. Real-life case studies make it easier for a potential customer to visualize what your service can change for them. If the solution worked for companies struggling with the same difficulties, why wouldn't it improve things for them as well.

Follow-up to revive a lead

Background: A month ago you were very close to clinch a deal with a lead that perfectly matches your dream customer profile. However, they finally said the time isn't quite perfect right now for them to make a purchase. You both agreed to revive this conversation at a more convenient time.

Here's a follow-up sequence you prepared:

Opening mail

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Subject: How are things at {{Company_Name}}?

Hi {{First_Name}}

How is it going? Do you remember our last conversation? We talked about how you can improve your current customer management process at {{Company_ Name}}. You told me that {{Snippet_1}}.

I'd love to get back to our discussion. Does Thursday morning work for you?

<SIGNATURE>

Follow-up

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Hi again {{First_Name}}
Does Thursday morning still stand for a 15-minute call?

P.S. We have a {{Snippet_1}} discount for all new customers till the end of this week ;)

<SIGNATURE>

What's the approach?

There may be various reasons for leads to postpone the deal closing: their company may be going through a difficult period, the price is too high for their bootstrapped budget or the decision making process in the company is long and complex. Either way, it's worth to put those leads on hold for some time and reach out to them at a later time.

But keep in mind that if you're a subject to *GDPR*, you need to have a valid reason to store your leads' contact information. If they explicitly said they aren't interested in your offer, you have no ground to contact them again.

How to structure the copy?

- Come up with an attention-grabbing subject line that implies you two talked before. The addressee will be more willing to open an email from someone they already know.

- Treat the opening email as a sum-up of your previous conversation. Remind the addressee what you talked about and what were the conclusions.

- Since you've already discussed how your product will improve their workflow, there's no need to repeat it again in the follow-up. In this case a follow-up email has one purpose - you want them to accept the invite. You can add a P.S. with a discount info for additional motivation.

TEMPLATES FOR FOLLOWING UP

WITH CUSTOMERS

How to follow up with customers?

Before you get started with contacting your customers, always gather and analyze the data from your CRM. Try to segment the customers according to the criteria of your choice, for example by business type or their activity level in your app. Customer segmentation will help you better adjust the content of your message to the recipients, and thus give them more value.

Don't overdo with the amount and frequency of emails you send. If you just recently contacted a group of customers with a product review request, try not to target the same segment with questions about their opinion on a new feature the next day. Manage your campaigns strategically.

Let's move on to the follow-up templates that you can base on while contacting your customers in various scenarios.

Case 1

Follow-up to ask for a review

Background: You created a great product. You got your first customers. Your company is growing. All you want now is to spread the word about your awesome product and encourage more people to trust your brand. You can do it with reviews and testimonials from your satisfied customers.

First, you should prepare a list of customers you want to ask their opinion on your product. You can extract their contact data from your CRM or reach out to those who are most engaged on your social media profiles. It's up to you what criteria you choose.

Let's see what your review request could look like:

Opening mail

Subject: I'd like to hear your opinion

Hi {{First_Name}},

I'd like to thank {{Company_Name}} for being with us this year. We're very happy to see your company grow with the help of our product. Keep up the great work!

I'm reaching out to you to ask whether you'd be interested in sharing your opinion on {{Website}}? Here's a direct link >>

Let me know if you have any questions.
<SIGNATURE>

Follow-up

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Hi again {First_Name}},

We're improving thanks to customers like {{Company_Name}}. Help us spread the word about our product on {{Website}} and encourage new users to try our product and grow with us. Click here to post a review.

*Thank you for your support!*

<SIGNATURE>

What's the approach?

Reviews are an important trust-building factor for your business. It's worth asking your customers for testimonials at every stage of your company's development. You should collect new opinions on your product or service on a regular basis. End of the year sum-up is a perfect occasion to ask for a review.

Don't be afraid of reaching out to your customers with a review request. If they are truly satisfied with your product, they won't mind sharing their thoughts.

How to structure the copy?

- Come up with a straightforward subject line. As I already mentioned, those who see the value of your product for their business won't hesitate to share their opinion with others.

- Thank them for being your customers. This is not just a courtesy. After all, if it hadn't been for them, your company wouldn't make it. Appreciate their support.

- Directly ask for a review. Be transparent. If you want to post their testimonials on your website, ask for their permission upfront. If you'd like them to share their opinion on an external review site, provide them with a direct link to minimize their effort.

Case 2
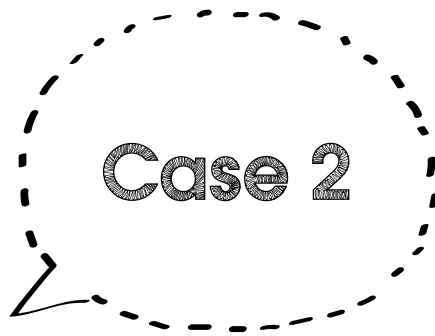
Follow-up to an inactive client

Background: You noticed that some new clients haven't been using your software since the first login. You're aware that in the long run their inactivity may turn into churn. To avoid such a scenario you've prepared the following follow-up campaign:

Opening mail

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Subject: Long time no see

Hi {{First_Name}},

You haven't been around since you set up your account. I just want to check if there's anything I can help you with?

<SIGNATURE>

Follow-up

Hi again {{First_Name}},

Have you seen our video tutorial for beginners yet? You can watch it here. I'll gladly walk you through your first campaign setup process live and answer your questions. Does Tuesday sound ok for you?

<SIGNATURE>

What's the approach?

You should start with research. Browse your data to learn as much about inactive customers as possible. Check for how long they have been inactive, whether they contacted your support team, what challenges they encountered and if their problems were solved.

Then prepare a campaign aimed at activating them. Show your interest and offer a helping hand. Be supportive.

How to structure the copy?

- You can play with the subject line a bit. Make it sound as if you were addressing an old friend of yours.

- One or two sentences is enough for the opening email copy. Provide the reason you reach out to them (for example they were not active since their first login) and offer help.

- In the follow-up email give them something valuable: a link to a video tutorial, an invite for a webinar that will address their problem, a link to download an ebook - it's up to you. You can also propose a 1-on-1 meeting to answer their questions.

Case 3
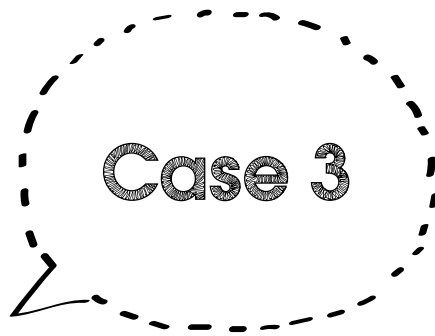
Follow-up to upsell your product

Background: You're a sales rep in a SaaS company that offers a prospecting tool. While researching your customer base you noticed that some of your customers could benefit from additional functions and higher limits that are available after upgrading the account to a PRO plan. You decided to take the initiative and suggest them an upgrade.

Opening mail

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Subject: What if...?

Hi {{First_Name}},

Our customers' business growth is a top priority for us. That's why an idea popped into my head today...

What if I told you that you can streamline your prospecting process even more and go beyond your current search limit? I believe that upgrading your account to the PRO plan would empower your team to do more in less time. The process you currently do manually could be automated with powerful integrations. Plus, no more downtime due to exceeded limits.

Are you in? Let's talk about it on Thursday morning. Let me know if the time suits you and I'll send you an invite.

<SIGNATURE>

Follow-up

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I have some more food for thought for you - here's {{Company}} honest review of the PRO plan they recently posted on {{Website}}.

Are we set for Thursday morning? I won't take more than 10 minutes of your time ;)

<SIGNATURE>

What's the approach?

You should try to upsell your product or service without actually selling, but rather recommending. Show them how an upgrade will improve their current process. Listing extra features is not enough. You need to really put yourself in their shoes and present the benefits from their perspective.

How to structure the copy?

• Hook the recipient's attention with an intriguing subject line.

• Make it explicit that your intent is not selling, but improving your customer's workflow. Show that you care about their business growth and positive experience with your tool.

• In a follow-up email give the customers some "evidence" that illustrates what they can gain. Use cases, reviews and customer case studies will help them make up their mind.

Case 4
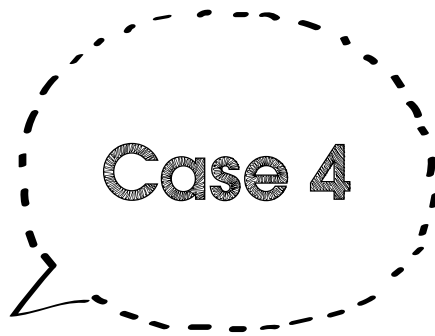
Follow-up to get feedback about new features

Background: Quite recently your SaaS company rolled out new features available to all your premium users. You'd like to learn about their experience so far.

Here's how your follow-up campaign might look like:

Opening mail

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Subject: Will you do me a favor?

Hi {{First_Name}},

What has your experience with {{Snippet_1}} been so far? I'd love to get to know your thoughts. Our customers' feedback helps us constantly shape our product's development. We want our tool to match your needs as best as possible.

Appreciate your support!

<SIGNATURE>

Follow-up

● ● ●

Hi {{First_Name}},

I thought I'd give you some more time for testing {{Snippet_1}}. What's been your experience so far?

*Thank you for feedback. Your opinion means a lot to my team.*
<SIGNATURE>

What's the approach?

Asking your customers for feedback after rolling out a major new feature is the best way of getting honest, valuable opinions. Those who truly care about your product will also suggest what you could improve or do differently.

My advice for you is to wait a bit longer than usual with sending a follow-up email -- even up to a week or two. Testing and gathering insight for constructive feedback takes some time.

How to structure the copy?

- In this template, the subject line is spot on. It will speak the loudest to those who really care, thus the ones who are most likely to give their feedback.

- The copy should be straightforward, but – first and foremost – very customer-focused. Highlight how crucial their feedback is for you. Make them feel a part of the process. Show that their opinion has an influence on your product's development.

Case 5
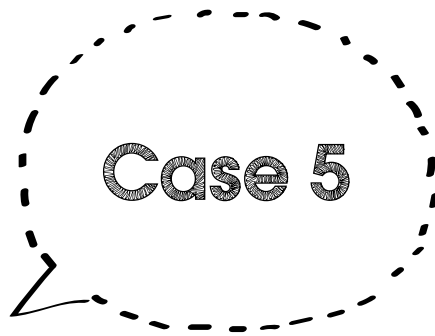
Follow-up to get ideas for new content

Background: You've recently organized a webinar for your clients that turned out to be a huge success. You'd like to continue delivering helpful, educational content for your customers. In order to collect some ideas, you want to ask your customers about topics that are most interesting to them.

Opening mail

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Subject: I need your help

Hi {{First_Name}},

Hope you learned a lot from our latest webinar. We'd like to give you more of educational content like that. What areas or topics would you like us to cover?

Thanks for all the suggestions!
<SIGNATURE>

Follow-up

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Hi again {{First_Name}},

Are there any topics that come to your mind? We're still gathering the ideas :) <SIGNATURE>

What's the approach?

In this case the target group for this campaign are the customers who took part in your previous webinar. However, you can also send the campaign to all your customers. You can base on the same template, just don't forget to personalize it with some snippets accordingly.

The ideas you collect will make a great base for creating future content on topics that your customers find interesting. No more guessing!

How to structure the copy?

- As always an attention-grabbing subject line is the key to have your emails read. It's hard to resist opening the email with a subject line that creates a curiosity gap. "I need your help", "Looking for ideas" or "Question" are just a few examples.

- Refer to the recent webinar (or replace this part with a different snippet when you address the campaign to all your customers). Stress that you'd like your content to touch real challenges your customers are facing. Again, make the email about them, not your company.

- The follow-up email serves as a gentle reminder in this case. Simply paraphrase your question. Don't create any pressure.

Follow-up to invite your customers to take part in your partner program

Background: Your company rolled out a new affiliate program for your customers. Your task is to explain the idea and encourage them to take part in it.

Here's what your follow-up sequence might look like:

Opening mail

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Subject: Let's grow together

Hi {{First_Name}},

I have exciting news to share with you. We've rolled out an affiliate program at our company recently. The idea is that the customers who are affiliates will get {{Snippet_1}} of each closed referral value.

Would you be interested in becoming our partner?
Let me know if you have any questions.
<SIGNATURE>

Follow-up

● ● ●

Hi again {{First_Name}},

Did you have a chance to give our partner program a thought?

Let's have a quick chat about it on Tuesday. I'd like to explain to you what the referral process looks like in more details. Here's a link to my calendar >> - pick any time that works for you.

<SIGNATURE>

What's the approach?

The focal point of the opening email is the value of the affiliate program for a customer. Be transparent about what they will gain from it. Leave the details, such as how to generate an affiliate link or what's the payout process for a 1-on-1 conversation.

How to structure the copy?

- Your initial email should have an informative character. Give the customer a general idea of what your affiliate program is about and what they can gain from being a partner. Hook their attention. Let them know you're open for their questions.

- In the follow-up email suggest a quick meeting to go over the details of the partner program. You can include a link to your online calendar for your customer's convenience.

It's your turn now

Ensure that your follow-up emails match the right context. Always structure the message around the needs of your leads or customers. Think of what brought them to contact you. Imagine their buyer's journey or the challenges they might have had with your product. It will help you better understand their current mindset and adjust the content of your email accordingly. Your purpose should be to make them feel well taken care of and provide as much value as possible.

Good luck with your follow-up campaigns!

Woodpecker