



Cut-and-Paste Email Follow-Up Templates

FOR BUSINESS OWNERS

Consumers today want to form a connection with the brands they're associating with. Starting the right conversation with the right person at the right time shows that you're paying attention. That kind of attention to detail can help you establish a level of trust, build stronger relationships and bolster customer loyalty. Let's discuss the different opportunities you have to follow up and interact with your network.

Customers move through a progression of steps throughout their lifecycle. Those steps look something like this:

Building Awareness

Evaluation

Purchase

Support

Loyalty

Advocacy

Retention

Most business owners reach out to their customers on a yearly basis, but we suggest connecting via phone or personal email at least twice a year in addition to any automated regular outreach.

Of course, you'll want to stay in front of your customers year round in order to earn repeat business and referrals, but reaching out at these key intervals can make all the difference when you're forming a bond with your customer base.



Building Awareness

New Prospect: When building awareness with new prospects, it's important to keep in mind that time is of the essence. Strike while the iron is hot; not only is it a savvy business move, it gives customers the impression that you're organized and on top of things.

Hi [Customer NAME],

It was great meeting you [Specify when and where you met]. I'd love to stay in touch. Do you mind if I connect with you on LinkedIn?

Sincerely,
[YOUR NAME]

New Referral: When introducing yourself to a referral, make sure you introduce yourself promptly, and connect online whenever possible.

Hi [REFERRAL NAME],

[Your customer] gave me your information. He/She is a customer of [Your Business Name] and passed your name along as a referral. We helped [Customer Name] by [Service you provide]. Are you in need of [Service you provide] at this time?

I look forward to hearing from you.

Sincerely,
[YOUR NAME]

PS. Let's connect on LinkedIn in order to stay in touch.



New Lead: Connecting with new prospects online, through social media, lead purchasing services and meetup groups has become the norm. In many of these circumstances you may be following up with cold leads whom you've never met in person. We suggest you follow up in a timely manner, as these leads may be actively shopping and reaching out to multiple sources for their expertise.

Hi [CUSTOMER NAME],

My name is [YOUR NAME] I received your information from [SOURCE]. Are you interested in [SERVICE YOU PROVIDE]? I've been in business [NUMBER OF YEARS IN BUSINESS] and helped over [NUMBER OF CUSTOMERS] [SERVICE YOU PROVIDE - for example: own their dream home]. I've included some links below to give you more background about my company and what we've done for other customers.

[LINK TO YOUR WEBSITE]

[LINK TO ONE OF YOUR REVIEW SITES]

[LINK TO YOUR FACEBOOK PAGE]

I'd love to discuss this further. What's the best time to reach you?

Best,

[YOUR NAME HERE]



Evaluation

Active Buyer: People who will require your services in the next three to six months are your best prospects for new business. Listening for these moments on social media or in your interactions can really pay off.

Hi [CUSTOMER NAME],

I hope you're doing well. [Connect with your customer: Make mention of your last conversation, ask about their kids, spouse, recent trips, common interests, etc.] I see that you may be looking to [SERVICE YOU PROVIDE] soon and I wanted to follow up. I'm happy to share my expertise and help you through this process. Let's set up a time to discuss. What works for you?

Best,

[YOUR NAME HERE]

Never lose touch.

OutboundEngine does the hard work of keeping in touch with customers for you. Simply follow up with the opportunities we surface, and focus on doing what you do best.

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Purchase

Ask for online recommendations post sale: Testimonials are a great way to capitalize on the excitement of a closed sale. This is a great time to thank your customer for their business and ask for an online recommendation where your customers can rave about your service.

Hi [CUSTOMER NAME],

I want to thank you for entrusting me with [SERVICE YOU PROVIDED]. I have a quick favor to ask. My business thrives on reviews, and I would really appreciate one written by you. It doesn't have to be anything fancy, and it shouldn't take more than a minute or so. [LINK TO REVIEW SITE]

Thanks again for your business. Please let me know if I can help with anything else!

Best,

[YOUR NAME HERE]

Thank your customer for their review: Claiming your profiles and responding to reviews (both positive and negative) allows you to take control of your online narrative. A simple thank-you for a positive review can further strengthen your customer relationship.

Hi [CUSTOMER NAME],

Thank you for taking the time to write an online review about [YOUR BUSINESS NAME]. [Confirm what they liked about your business in your response]. Reviews help my business grow, and it's nice to know that you've enjoyed your experience enough to recommend me online. It's been a pleasure working with you. Let me know if you need any assistance in the future.

Best,

[YOUR NAME HERE]



Support/Loyalty

Check in to build rapport: Outstanding support fuels customer loyalty. Loyalty is worth the effort to earn because it is the catalyst for customer advocacy. We recommend checking in with customers once a quarter as a best practice.

Hi [CUSTOMER NAME],

It was great working with you [TIME FRAME YOU WORKED TOGETHER]. [Connect with your customer: Make mention of your last conversation, ask about their kids, spouse, recent trips, common interests, etc.]

I wanted to check in and ensure [SERVICE YOU PROVIDED, e.g. you're loving your new home]. If there any projects that I can assist you with or topics I can provide more information on, please don't hesitate to reach out.

Best,

[YOUR NAME HERE]



Advocacy

Asking for referrals: Once you've earned your customers' loyalty and proven your expertise, you can and should ask directly for referrals. Experts say the best time to ask for referrals is immediately after a successful transaction, but we think for longer sales cycles checking in once a quarter can also be helpful.

Hi [CUSTOMER NAME],

I hope everything is going well with you. I have a quick favor to ask. Do you know anyone who may be looking to [SERVICE YOU PROVIDE] in the next [AMOUNT OF TIME: six months, three months, few weeks]? I appreciate any referrals you can provide, and I promise to do my best to continue deserving your business.

Thanks again, and please let me know if I can help you with anything!

Best,

[YOUR NAME HERE]

Saying thank you for a referral: When someone refers another person to your business, it's a testament to your work and the service you provide. Returning this kindness with a thank-you note will solidify your relationship and encourage more referrals in the future.

Dear [CUSTOMER NAME],

I can't thank you enough for referring [REFERRAL NAME] to me. I'm so glad I've been able to help you, and I look forward to providing the same care to your friend.

Referrals help my business grow, and I'm glad you enjoyed your experience enough to recommend your friends. Again, thank you for entrusting me with your business.

Sincerely,

[YOUR NAME]



Retention

Reconnecting with a past customer: Loyalty is the catalyst for customer advocacy. Build loyalty over time by checking in once a quarter with an email similar to the example below.

Hi [CUSTOMER NAME],

It's been awhile since we chatted, and I wanted to check in to see how things are going. [NOTE: Here you might mention a seasonal time change that may spur buying activity from your customer. For example: Do you have anything planned this summer that I can help you with?] As always, please feel free to reach out with any questions you may have. I am happy to share my expertise.

Best,

[YOUR NAME HERE]

Employee recruitment: Top performers are constantly in pursuit of a company that can offer progressive technologies and innovative ways to convert more prospects into business. Use this follow up email to get the most from your outreach.

Hi [PROSPECT NAME],

It's been awhile since we chatted, and I wanted to check in to see how things are going. When we last spoke you were still considering your options. I am happy to provide more detail about our company culture or the updates we've made to our technology, support and training programs. [Be sure to hit on the aspects of your company that the recruit is most concerned about. Something like - You mentioned that your company doesn't provide X and you're looking for that kind of support in order to make a move.] Let me know if you'd like more detail and as always, please feel free to reach out with any questions you may have.

Best,

[YOUR NAME HERE]



Wrap-Up

Follow up conversations happen in many different ways - over the phone, in person, via email or even text message. As a business owner, you have to do what feels natural and organic for your business. You may not use all of these examples, but hopefully these templates inspire you to reach out to your customers and keep in touch throughout their lifecycle. So many of our customers have relayed stories of a time they checked in with a customer and that follow up led to a big sale.

Keep your name top of mind.

Don't spend your time struggling to stay in touch! With OutboundEngine you can consistently add value with content that resonates with your customers over time, allowing you to follow up at key intervals and make a real impact.

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