

keap

10 emails you need to follow up the right way

Free templates



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Schedule and manage appointments with leads

If you're like most small business owners, you'll do anything to save some time. Use these email templates to save yourself time (and frustration) coming up with email messages whenever you're corresponding with prospective clients about scheduling a meeting and following up after a meeting.

Pro tip: Customize these emails to reflect your personality and the unique qualities of your business.

1. After meeting at an event

When to send it: Studies show that only 2 percent of sales occur when 2 parties meet for the first time. Meaning, follow up is essential. Not only does timely follow up improve the likelihood of a prospective client purchasing your product or service, it's also the clearest signal you can send them that their business matters to you. Use this email template after meeting someone for the first time. Send as soon after the meeting as possible.

To

Cc

Hi **[name]**, it's **[your name]** from **[where you met]**



Hi **[first name]**,

It was great to meet you at **[event]**. I really enjoyed hearing what you had to say about **[product/service/solution]**.

Since our conversation, I've had a chance to check out your website and was impressed by your company's **[site's unique value proposition]**. Your work sounds like it would be a great fit for our **[your product/service/solution]**.

I would love to set up some more time to chat more about it or, if you're interested, I could send over some **[templates/samples/examples]**.

Again, it was great meeting you at **[event]**. I look forward to talking with you again soon.

[Your signature & contact info]


2. Requesting a meeting with a lead

When to send it: 96% of small business owners say in-person meetings yield a return on investment—proving that face-to-face interactions are worth your time. Use this template to set up your next meeting.

To

Cc

Hi **[name]**, let's grab a coffee, my treat



Hi **[first name]**,

It's **[your name]** from **[where you met]**. I'm contacting you today to let you know how much I enjoyed meeting you and learning about your business. I was hoping we could continue the conversation over coffee.

I'm currently doing **[role/project]** at **[your business' name]**, and am very interested in learning more about how you use **[tool/solution/product]** to **[accomplish task]** mentioned in our last conversation.

Would you be able to break away for about **[15 minutes/a half hour]** this **[date & time]** to grab a coffee at **[location]**?

Hope to see you soon,
[your signature & contact info]

3. Following up after the first meeting with a lead or client

When to send it: Use this template after your first meeting with a new lead or client. Send it as soon as you can after the meeting.

To

Cc

Hi **[name]**, here's the follow-up items from our meeting today



Hi **[first name]**,

Thanks for meeting today. I enjoyed our conversation and learning how I/we **[can help lead achieve their goal]**.

Here is the **[sample/link/documents/etc]** I mentioned during our conversation. If you have any questions or would like to further the dialog, let me know. I'd be happy to make myself available to further the conversation.

Thanks again for your time let's keep in touch.

Best,

[your signature & contact info]


4. A follow up to that follow up (“just checking in”)

When to send it: Oftentimes a lead “goes dark” because they’ve been too busy to reply. Usually, all that’s needed to restart the conversation is a little nudge. Use this template as that friendly reminder.

To

Cc

Hey **[name]**, it's **[your name]** checking in



Hi **[first name]**,

Hope all is well. Just following up with you in case this email got buried.

[your signature & contact info]

5. Following up and highlighting the benefits of your product/service to the lead

When to send it: This template can be used when you need to follow up and find yourself with an opportunity to talk yourself up. Including some high-level details about you and your business may be all that's needed to seal the deal.

To

Cc

A few items I didn't have a chance to mention in our meeting



Hi **[first name]**,

It was great meeting you **[date/time]**.

Our conversation got me to thinking about your **[lead's specific business challenge]**. Listening to your story I couldn't help but conclude that **[your business]** could help you solve your **[lead's specific business challenge]**.

Here are a few ways we can help:

[Bulleted list of features & benefits that pertain to lead's business challenge.]

Could we schedule a call sometime this week to discuss more?

Also, here are some **[case studies/sales materials/links]** to give you a better idea of the how we've helped our customers overcome the same issues.

[Your signature & contact info]


6. Following up after a phone conversation

When to send it: Use this template to maintain top of mind awareness once you've made contact. Your follow up is ideal for nurturing your leads and to help them trust you and see you as a professional.

To

Cc

Quick post-call follow up



Hi **[first name]**,

It was great speaking with you **[date/time]**.

I just wanted to follow up on our conversation about your **[lead's business challenge]**.

Here are a few ways we can help:

[Bulleted list of features & benefits that pertain to lead's business challenge.]

I'm sending you these **[case studies/sales materials/links]** to give you a better idea of the how we've helped our customers overcome the same issues.

I'll check back with you in the coming days to hear your thoughts.

[Your signature & contact info]


7. Following up after a no-show or cancellation

When to send it: Sometimes the best-laid plans go awry. When that happens, don't sweat it. Use this template to let your leads and clients know that there's always a next time. Within Keap there is an appointments feature that makes rescheduling easy.

To

Cc

Looks like our signals got crossed



Hi **[first name]**,

I was so looking forward to **[meeting/talking]** to you **[date & time]**.
But, hey, I get it. Busy happens.

Let's reschedule. Here's my **[calendar link]**. Pick a time that's good for you and we'll talk then.

Thanks!

[Your signature & contact info]

8. Re-engagement

When to send it: If your lead initially expressed interest only to go M.I.A., send this quick email asking for a status update to ensure you don't give up too soon on a promising lead.

To

Cc

Are you still there?



Hi [**first name**],

I haven't heard from you in awhile and wanted to see if [**your business' name**] is still on your radar. I know you're busy, so I don't want to take up too much of your time. Can you reply back with the number that best describes your status?

1. I'm very interested, so please give me a call!
2. I'm still interested, but now isn't the best time. Keep following up with me.
3. I'm not interested, so please take me off your list.
4. I can't remember who you are. Can you remind me?


9. Last attempt to contact

When to send it: Send this email to a nonresponsive lead to find out whether they're officially not interested in buying.

To

Cc

Taking you off my list



Hi **[first name]**,

I'm reviewing my list of contacts I haven't been able to connect with after a few attempts. I don't want to keep pestering you if you're not interested in **[your business' name, product or service]**. Unless I hear otherwise, I'll take you off my list.

However, if you're still interested, what do you recommend as a next step? Thanks for your help.


10. Asking clients for a referral

When to send it: Referrals are a lifeline to most small businesses. In fact, they're often a top lead source. After you've turned a lead into a happy client it's time to ask for a referral. Use this template to ask them to refer friends and family.

To

Cc

How can I help?



Hi **[first name]**,

Assisting customers with **[the problems your business solves]** is the reason I got into business, and I'm always looking for more people to help. If anyone comes to mind, can you please send me his or her contact information? As a way to say thanks, I'd like to offer you **[a referral incentive, if applicable to your business]**.

Conclusion

We hope these templates help make it easier to write effective sales emails. Visit the Keap [Business Success Blog](#) for more small business resources.

Did you like this guide? Read more!

Explore our [Business Success Blog](#) for more sales and marketing articles, guides, webinars, and other resources that can help your small business grow and thrive. Want to talk to a small business consultant?

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