

# Development Effective Follow-Up Email

## Bonus: Sample Emails

### Components of an effective follow-up email: AARP

1. **Acknowledge** why you're following up
  2. **Ask** to learn more
  3. **Recommend** a clear next step (i.e. to schedule an introductory meeting)
  4. **Provide** additional, relevant value to keep them engaged (use a trackable link or drive them to your website, if possible)
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### Sample email templates

#### SAMPLE EMAIL #1

Subject line: Thank you for reaching out (or personalize in a relevant way)

[NAME],

Thank you for *[customize with action taken]*.

I'd love to learn more about you and your financial situation.

Schedule an introductory call so we can determine if we may be able to address your unique needs.

In the meantime, you may find this *[relevant resource]* of interest.

Sincerely,

#### SAMPLE EMAIL #2

Subject line: Re: Thank you for reaching out

[NAME],

Thank you for *[customize with action taken + add when – downloading XYZ earlier this week]*.

I'd love to learn more about you and your financial situation.

Here's my calendar, schedule a time to connect for an introductory conversation.

Sincerely,

P.S. If you found [reference value-add provided in previous email] helpful you may be interested in [another relevant value-add].

## SAMPLE EMAIL #3

Subject line: Re: Thank you for reaching out

[NAME],

Since you've [*customize with action taken*] I've send you a couple additional resources. We have more content and services that may be relevant but I want to make sure this information is on interest to you.

Do you have time over the next week for an introductory call? Feel free to let me know what days and times work best or schedule time.

In case you missed them:

- [Resource 1](#)
- [Resource 2](#)

I look forward to learning more about you and your financial situation

Sincerely,

## SAMPLE EMAIL #4

Subject line: 30 minutes over the next week?

[NAME],

Thank you for [*customize with action taken*].

If you have 30 minutes over the next week I'd love to connect to learn more about you and your financial situation. Even if we aren't the right partner, I will point you in the right direction.

Here's my calendar, feel free to schedule a call.

All the best,

## SAMPLE EMAIL #5

Subject line:

[NAME],

Thank you for [*customize with action taken*].

When you are ready to connect, I'd love to learn more about you and your financial situation.

In the meantime, is it ok if I add you to our [newsletter for monthly highlights on the markets, email list to receive planning-focused blog posts, whatever you have to stay in touch. Highlight what's in it for them]?

Here's my calendar, feel free to [schedule a call](#).

All the best,

P.S. [Subscribe](#) to receive [customize].

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