

The Email Format That Really Works for Category 1 and 2 Prospects

Category 1 prospects are people who have been clients before.

Category 2 prospects are those who you have some connection with.

1. Attention-getting headline that is not gimmicky
2. First paragraph that is about your recipient, not about you.
3. Second paragraph that talks about what you are up to and mentions outcomes. Followed up by a sentence that suggests a reason for connecting.
4. A call-to-action that requests a time to chat and gives some times you are available.

Some samples of each section

1. Attention-getting subject line that is not gimmicky

I like writing something that creates some curiosity and makes it personal.

David, I have some management ideas that may interest you

John, a question about your current compensation plan

Sarah, a new productivity process I recently learned about

Here's an article on email subject lines from Hubspot:

[23 Sales Email Subject Lines That Get Prospects to Open, Read, and Respond](#)

Read this and then develop some subject lines for your business.

2. First paragraph that is about your recipient, not about you

Find a way to authentically acknowledge or praise your recipient. Remember, all these emails are sent individually, not as a mass mailing, so personalization makes all the difference. Of course, the better you know someone the easier. Always start with "Dear Name" or "Hi Name."

- 1.** I remember in college how you were always the one to ace the science exams! It's no surprise to me that you're now the manager of research at Breakthrough Life Sciences. Congratulations for making your dream real.
- 2.** While it has been some time – and I am certainly not going to be the one to count the years – I must say I was more than delighted to come across the fact recently that you have been appointed the Managing Director of XYZ Corporation. Congratulations! A leader has emerged!
- 3.** I've been following your posts in the Awarepreneurs Facebook page for some time and really appreciate your perspective on doing business consciously. I recently took a look at your website and I was impressed. You are walking your talk.
- 4.** John Grady, our mutual business associate suggested I reach out to you. He was effusive in his praise of your management and leadership skills. I took a look at both your LinkedIn profile and your website and understand what he was talking about.

5. You and I are both members of the Santa Cruz Chamber of Commerce. I recently learned about you from another Chamber Member, Susan Treller who mentioned your expertise as a management consultant.

6. We haven't touched bases in a long time. Last time we met you were working on a new project to expand your business. I just took a look at your website and I'm impressed with what you've accomplished.

7. Thanks so much for attending my talk last week on "How to Give Feedback in the Workplace Without Getting Resistance." I hope you got some good ideas and thanks for participating in the exercise on giving feedback. I could see the "ah-ha lightbulb" turning on.

8. It was great bumping into you at the Chamber of Commerce mixer yesterday. You seemed really excited about your new business. I think it has a lot of potential. I've worked with a number of people in your field and you're filling a growing need.

With a little practice, these are not hard to come up with. Just stick with the formula. Say something about them, congratulate them, make them feel like they are known and appreciated. Then you can get to the next part where you talk about what you're up to.

3. Second paragraph (or section) that talks about what you are up to and mentions outcomes. These all correspond to the first paragraphs above. Then, it suggests a reason for getting together or having a conversation.

1. These days I'm up to some exciting things. Recently worked with a client who is getting more productivity from his high-level teams than ever before.

I thought about you and would love to share some ideas related to this that you might find useful.

2. Well, I am still going strong on the leadership front and actually gave a talk on "Triggering Excellence in Leadership" at a congress of European Managers in Montenegro in June. As you can see from the photos below: Honor in her element!

I'd love to connect with you and learn what's happening in the leadership of your organization. I have a few ideas that may intrigue you.

3. One thing you mentioned in your posts was the challenge of filling your workshops. I've been succeeding with this in my own business and for my clients for over 20 years. The last three workshops I did were filled to capacity.

I took a look at your enrollment page for the workshop and have a few ideas you might find valuable.

4. John also mentioned that you'd like to see better leadership skills with your top team members. This is a big issue these days, especially with new people who are expected to get up to speed faster than ever.

I have some ideas about Emerging Leaders that John thought you might be interested in discussing.

5. I'm not sure Susan mentioned this about me, but I've been working with management consultants for over thirty years with a focus on helping them attract more high-end clients.

Don't know if this is a priority for you or not, but I'd love to have a short discussion and share some of my ideas.

6. You told me to be in contact with you once the website was up and running. I've taken a look and I like what you've done so far.

I have some ideas for you that could help take it to the next level. Shall we set up a time to talk?

7. As I mentioned after the talk, I've been helping companies improve their productivity one conversation at a time. I don't know about your company, but I've discovered that improved communication and feedback can make a big difference to the bottom line.

I'd love the opportunity to speak with you briefly share some ideas that have made a huge difference to several of my clients.

8. You mentioned in our brief chat at the Chamber that you're finding that staying organized and on top of all the details of running a new business can be very challenging. I recently helped a new business owner like you get everything organized and streamlined in less than a week.

I'd love to chat and share some techniques about how we were able to do that.

Again, these are short, simple and straightforward. I say enough to pique their interest and increase the chance that they'll want to have a

conversation with me. I'm not selling hard. I'm just introducing what I do in such a way that there's a good chance they'll want to know more.

Notice that in the second part I suggest a reason for getting together. I personally like the approach of "sharing some ideas that might help you."

The key with both of these opening sections is that they need to be very personalized to the person you are reaching out to. Ultimately, after some experience with these emails, you'll have written enough to be able to fall back on certain formats and wording, but they should never sound rote.

4. Closing the Email by Suggesting a Time for a Meeting or next step

I don't know about you but it irritates me when someone connects and then put the ball in my court to set up a time to meet. You can save an email and some aggravation if you suggest some appointment times yourself. Here are some possibilities.

- 1.** I have time open all next week after 12 noon, except on Thursday. Let me know what might work for a short conversation.
- 2.** I have a few times open next week to talk briefly: 10 am Tuesday, 3 pm Wednesday and 12 noon on Friday. Please let me know if one of these works for you. If none of these work, please let me know when you're open the following week.
- 3.** My next week is fairly packed but I have all Wednesday afternoon after 1:00 pm open. The conversation will take about 15 minutes. Please let me know if you can find a time then to chat.

4. If you'd like to set up a time to talk briefly, you can [link to my online calendar](#) and choose any time that is open.

Again, customized to your situation. I've found this approach to be very successful. Of course, people are not always open at that time or are not yet ready to have that first conversation, but they'll frequently let you know. Because this approach is so personalized, the response is typically quite high.

What to do:

Write some emails. Send them to me to look at and tweak.

Keep it simple. These are people you know to some degree or other. This kind of email is informal and friendly. It's not a hard sell.

Your purpose is not to sell them or convince them of anything, but to just get a quick conversation.