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Email Templates for Scheduling Clients & Prospects

Feel free to copy and paste these sales email templates to use in your business. Please keep in mind one simple rule: your emails should always be written in a tone that represents your business. By customizing these email templates to fit your brand, you're more likely to get the results you're after.

5 sales email templates for scheduling clients & prospects are:

1. Initial outreach to your prospect
2. Follow-up email
3. Aggressive marketing follow-up
4. Closing the file
5. Long-term follow-up email

1. Initial outreach to your prospect

Your prospects can reach you through a variety of channels, such as direct email inquiries, website forms, and more. If you are going to respond with an invitation to schedule a meeting, this simple email template is a great place to start. Because this template can be used for any kind of meeting, the wording is broad — you'll need to adjust the language to match your company's brand, tone, and offering.

Initial outreach email template

Hi [contact name],

Thanks for getting in touch — we're excited to chat with you!

Please click this link to schedule your demo: {your-company.calendly.com}

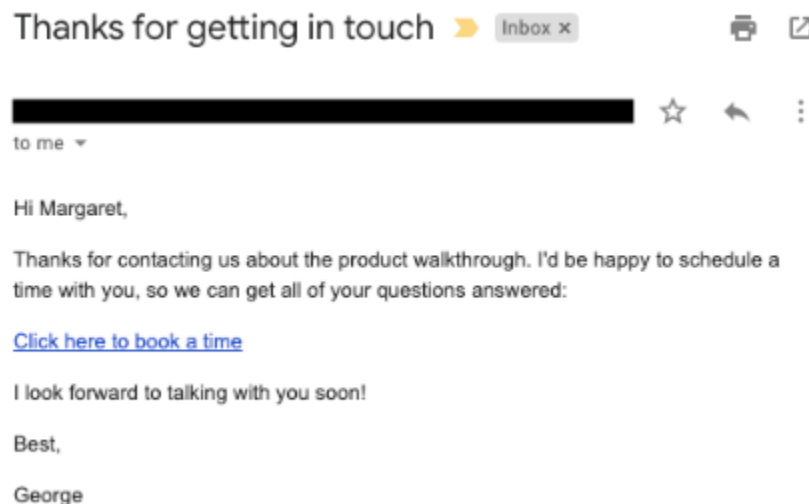
We look forward to talking with you soon.

Best,
[Company rep name]

Sometimes a raw sales email template like the one above can seem generalized. To show you what this looks like in practice, I've written and provided screenshots of fictional emails between a sales rep, George, and his client-prospect Margaret.

Let's imagine that Margaret has contacted the company and requested a product walkthrough. The email template variables shown above (like first name and URL) have been modified to fit this situation.

Here's what this email might look like in practice:



2. Follow-up email

If you sent an initial outreach message and haven't heard back, it's possible that the prospect needs to be persuaded. What will they get from this meeting?

Follow-up email template

Hi [contact name],

[Company rep name] here from [company name]. I wanted to reach out and see if I could help answer any questions you may have about [your company's expertise].

You can book a time to meet with me here or just reply to this email. We can walk through your goals and show you how [company name] can help you with [value proposition].

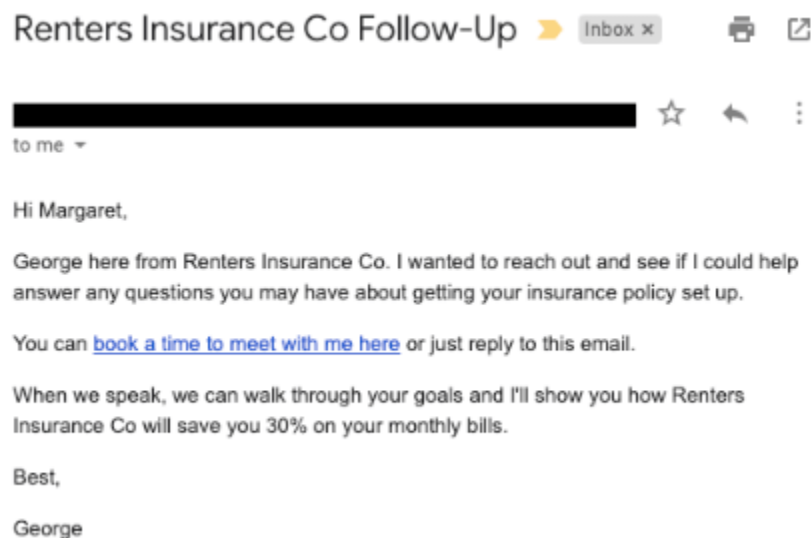
*Best,
[Company rep name]*

Follow-up email in practice

The first half of this email is similar to the initial outreach template: George leads with an offer to help answer Margaret's questions and includes the booking link to schedule a time.

But he ends the email with a different approach.

This time, the value proposition is clear: When they speak, George will show Margaret how the plan can save her 30% on her monthly bills. A strong offer like that can do wonders for engagement.



3. Aggressive marketing follow-up

There are certain types of relationships with your contacts where an aggressive follow-up might be appropriate. If someone expresses a strong, genuine interest in meeting, but is not responding to your emails, it's possible that they just got busy.

Even if they want to meet, it might not be convenient for them to respond to you at the moment. To ensure that you stay top-of-mind, try sending a message every other day, like the ones outlined here.

"Schedule a Call?" follow-up email template

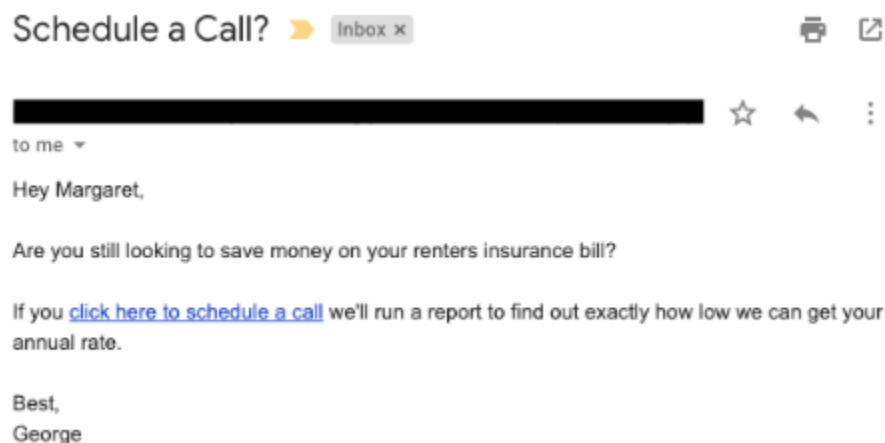
Hi [contact name],

Are you still looking for help with [value proposition]?

If you click here to schedule a call, I can walk you through exactly how we can help.

Best,

[Company rep name]



“Quick Question” follow-up email template

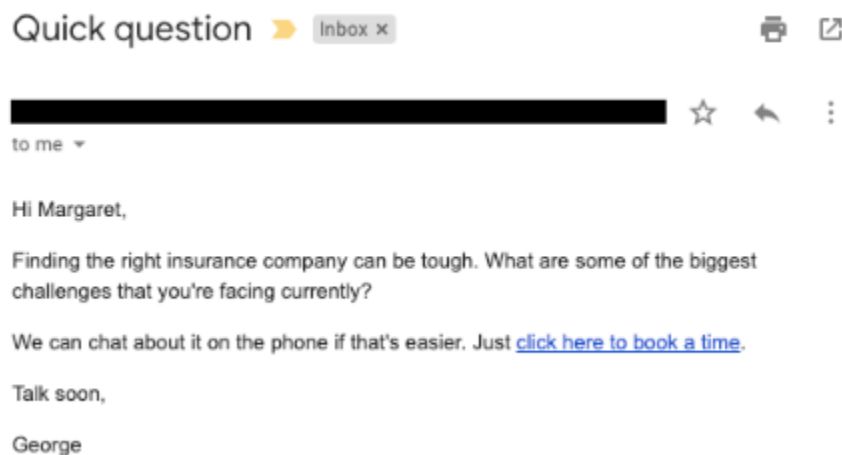
Hi [contact name],

[customer problem] can be tough. What are some of the biggest challenges that you're facing currently?

We can chat about it on the phone if that's easier. Just [click here to book a time](#).

Best,

[Company rep name]

**4. Closing the file**

If you've sent a prospect several messages without any response, it's okay to acknowledge that you tried to reach them and failed.

The best thing to do is back off and assume that they're not interested, but in case that's not true, you can provide your meeting scheduling link one more time. [Emails like this can convert](#) well because people realize that their opportunity is slipping away.

Closing the file email template

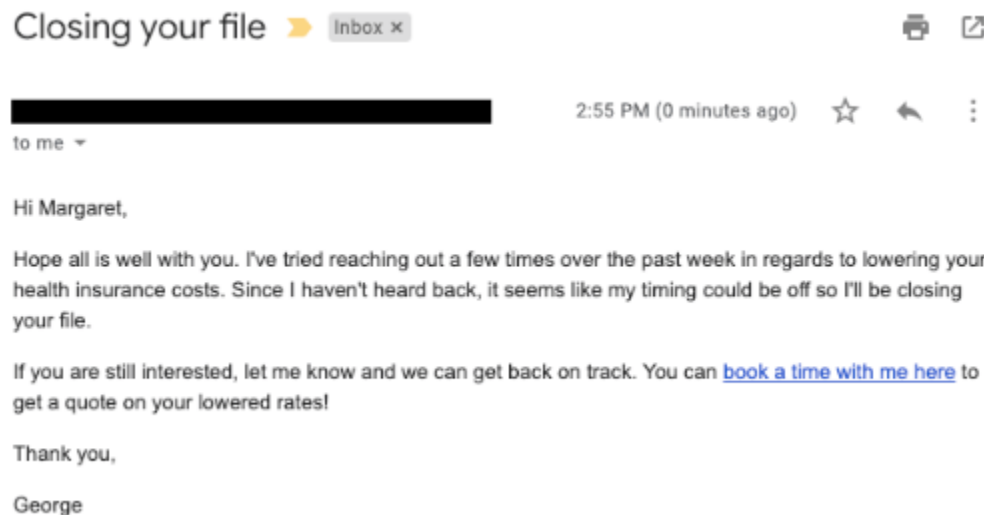
Hi [contact name],

Hope all is well with you. I've tried reaching out a few times over the past week in regards to [value proposition].

Since I haven't heard back, it seems like my timing could be off so I'll be closing your file.

If you are still interested, let me know and we can get back on track. You can book a time with me here if you're ready to discuss [value proposition]

Thank you,
[Company rep name]



5. Long-term follow-up email

It's been a while since you emailed the prospect. Try offering a new value proposition as a bonus incentive to re-engage them.

If you don't have a discount available, reiterate the high value of your offer and make that the centerpiece.

Long-term follow-up email template

Hi [contact name],

I'm reaching out to follow up on the demo request you made on [company name]'s website a few months ago.

I'd love to find out what else we can do to help with [value proposition].

We have a lot of resources to offer you. However, in order to get you the best materials, I would like to schedule a meeting to discuss your needs and make sure we're on the same page.

Email me back when you have a moment, so we can decide whether a demo is appropriate.

If you are ready to schedule a time with me now, just click here and pick a date that works for you.

Thank you,
[Company rep name]

Get 25% off your annual Renters Insurance cost!



Inbox x

[Redacted subject line] ☆ ↶ ⋮

to me ▾

Hi Margaret,

I'm following up on the demo request you made with us a few months ago, regarding lowered insurance costs and the product walkthrough.

We just launched a special campaign where we're offering 25% off annual subscriptions. The offer only lasts for seven days, so you'll need to act fast!

You [claim your limited-time discount now](#).

But if you have some questions first, I'm happy to go over everything in more detail with you.

Just click here to [book a time](#).

Best,

George