Here is a list of follow up emails that work incredibly well. Just use these and send every few days.

I would also recommend using a Gmail plug in called Mail Track to see when people have opened your emails <https://mailtrack.io/en/>

**Still Interested?**

Subject: Still interested?

Hope all is well. I had put a reminder in to check-in with you to see how things were going. We had discussed setting up an email campaign to reach out to your previous clients to help keep you top of mind.

Regular emails to keep your clients informed of new laws and changes in estate planning are a great way to keep them engaged and coming in to keep their wills up to date.

I would love to catch up and see if there are any opportunities to engage with you and help with your marketing strategy. Let me know if you have some time to reconnect this week and catch up, business owner to business owner on where you see things and I can provide some ideas on where we can help.

Look forward to hearing from you.

[YOUR NAME]

**The “I Missed You On The Phone”**

Notes: You can call when they’re not open and leave a message.

Subject: Sorry I missed you on the phone today

Sorry I missed you on the phone today, I was calling because…. (leave a one sentence reason for your call, or the name of the referral / event that introduced you)

In my voice mail, I mentioned that I will call you back on [DATE] at [TIME] and of course you can always reach me before then at [YOUR PHONE NUMBER].

I look forward to connecting.

Cheers,

[YOUR NAME]

**Learning More**

Notes: When they write back and don't say much. This is when you get to listen to what their real issues are.

Subject: Thanks for getting back to me. I have one more question.

Hi

Thanks for taking the time to share a little about your firm, as well as the goals and challenges you face.

If you would like to learn how other estate planning firms are dealing with challenges like yours, I would be happy to schedule a call. We could also talk a bit more about your challenges and determine whether or not I might be able to offer some help.

If you would like to talk some more, use the convenient link below to directly schedule a time on the calendar for us to speak.

[Link to calendar created using Meetings Tool]

Best,

[YOUR NAME}

**The Next Step**

Notes: When you may or may have not gotten a response, this will work. If you haven't gotten a response from your first contact email, send this 3 days later. If you have and you didn't get much info, send this 2 days later.

Subject: Next steps?

[Name], I’m writing to follow up on our last conversation. My boss asked me for an update on your account. I told him I didn’t have one.

I’m not sure what makes sense to continue the conversation. What makes sense as a next step, if any?

[YOUR NAME]

**Price Objection**

Notes: It's not always price but often times it is. Best to find out why

Subject? Your Thoughts on our pricing?

I noticed that you didn't opt to let us email your clients on your behalf. And we'd love to know why.

I have no intention of trying to sell you anything, but we do want to make sure that we're hitting the mark with our customers.

Any feedback you can give us would help.

Were you not clear on what you were getting? Is there somewhere else in your business that you need to focus? Was it too expensive? Or is your business smooth sailing?

If you respond I can send over a coupon for 20% off the first month’s email marketing service with us. Please respond to this email with your reason why you didn't purchase and we'll send that over.

Best,

[YOUR NAME]

**Check out this article**

Subject: Check out this article

I don’t know if you saw this article from a few years ago but it's still amazing relevant. It’s related to the issue we were talking about.

<https://www.kiplinger.com/slideshow/retirement/t021-s014-12-times-when-you-should-update-your-will/index.html>

I hope you find it interesting. These are exactly the kinds of topics we send to your list to keep them engaged and coming back to your firm.

[YOUR NAME]

**Setting up the next talk/email/zoom**

Notes: Some people will want to see you. Best to just get in a zoom and talk for a few. This also is a good way to respond to someone who says they don't have time right now.

Subject: Which day works best for you?

Thanks for getting back to me so quickly. I really appreciate it. I’d be happy to reach back out in August/Tuesday/next Week.

Does it make sense to schedule something tentative on our calendar to connect? That way we can save time by not having to go back and forth.

How does your calendar look in August? What would be a good week or day for us to connect?

Thanks for your help. I look forward to talking.

[YOUR NAME]

**I'm not interested response**.

Notes: Just hit respond in the same thread, no need to create a new email or subject line

Name,

Thanks for the quick response. Since it doesn’t make sense to talk, I have one quick question. What would need to change in the future for it to make sense for us to talk?

Thanks for your feedback,

[Signature]

**I'll Keep Your Name on File response.**

Notes: Just hit respond in the same thread, no need to create a new email or subject line

Name,

Thanks for the quick response. I’ve found that when people say they will keep my information on file, typically it’s just a polite way of saying they aren’t interested. If that is the case, do I have your permission to close your file?

If it is a timing issue, what would need to change in the future for it to make sense to talk?

Thanks for your feedback.

[YOUR NAME]

**When They Ignore You**

Subject: Should we just break up?

Hi [NAME],

I’ve tried to reach you a few times to go over suggestions on improving [BUSINESS NEEDS], but haven’t heard back which tells me one of three things:

\*You’re all set with [BUSINESS NEED] and I should stop bothering you.

\*You’re still interested but haven’t had the time to get back to me yet.

\*You’ve fallen and can’t get up and in that case let me know and I’ll call someone to help you.

Please let me know which one as I’m starting to worry!

[YOUR NAME]

**The Stalker**

Subject: I feel like a stalker

Hey [NAME],

How's it going?

I feel horrible troubling you and I'm starting to feel like a stalker. Much appreciated if you can let me know if you'd talk about fixing your site. If not, I won't send you another email.

Here's the most recent updated list of [COMPANIES] I’ve worked with: [LIST OF COMPANIES / PEOPLE]. (leave this last line out if you want but feel free to use it after you have a few sales.

Cheers,

[YOUR NAME]

More Tips:

**The Mirror**

This assumes they have gotten back to you. Here are some tips when responding.

If the message is written with large letters, reply in large letters; if it’s in small letters, reply in small letters—match the font size.

If the email is personalized, be sure to personalize your reply in the same way. If the email is more cryptic — for example, if they don’t even say “Hi Greg” or “Dear Greg” — then eliminate your greeting as well. Additionally, match the way the prospect closed the email. Perhaps she wrote, “Thanks,” “Sincerely,” or “All the best.” Use your email to do the same.

Mirroring and matching is a great technique for establishing bonding and rapport. People buy from people they like… and people like people like themselves. If you can establish some rapport before you even get on the phone with the prospect, you’ll be that much closer to figuring out whether there’s a problem you can solve… and that much closer to closing the sale.

Here’s another concept that works well to create rapport: Respond quickly! Remember this principle: “Time kills deals.”