Guide: Email best practices for lead follow-up

Components of an effective follow-up email

1. Write a compelling subject line to get them to open it. (subject line evaluator)
2. Acknowledge why you're following up.
3. Make it about them (not you). For example, show interest in learning about them.
4. Provide a clear, easy to take, next step or call to action (CTA) (i.e. to schedule an introductory meeting).
5. Provide additional, relevant value to keep them engaged (use a trackable link or drive them to your website, if possible).

Use AI to draft content

Writing marketing copy is an art, if it's not your strength use an AI GPT such as Claude or ChatGPT to help you draft strong subject lines, email templates and voicemail scripts.

Sample AI prompt to create a series of six follow-up emails
"I am a financial advisor at [*website URL*]. Draft a subject lines and email templates for a series of six emails to use to follow-up with leads. I'm targeting pre-retirees and retirees worried about if they can retire and what they need to consider in their financial situation before and after they retire. The goal of the email is to get them to book a meeting with me or engage with the content provided. Ideally the email is less than 150 words and includes personalization in the first sentence."

Customize the prompt for your desired output, target audience, tone, call to action, and more.

Use technology and integrations to empower the process

- Emailing from your personal email account works but a marketing automation system (email platform) like FMG (SEI Strategic Partner), Snappy Kraken (SEI Strategic Partner), Levitate, MailChimp, and Hubspot can help you build campaigns, track open and click-through rates, and integrate with your CRM to gain efficiency.
- Invest in an online scheduler such as Calendly to reduce the friction of booking a meeting.

- Set up integrations with your CRM, marketing tools, website, online scheduler, and more to automate as much as possible from capturing form fills as leads in your CRM, automatically sending follow-up emails, alerting team members of new leads, meetings booked, etc.
- Start by defining your sales process to determine how to use the technology you have and invest in new technology that works with your current tech stack.

Recommended email schedule

- Email quickly following lead outreach, within 24 hours if possible.
- Email (or call) 4x the first two weeks and 1-2x the next 2 weeks.
- If no response, request adding to newsletter or email monthly ongoing.
- Pay attention to what's working (and what's not) based on open and click-through rates, and responses. Adjust your approach as needed.

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Receive Lead **Email #1**			**Email #2** or call if you have their #	
Week 2		**Email #3**			**Email #4** or call if you have their #
Week 3			**Email #5**		
Week 4			**Email #6**		

Sample email templates for warm leads (they know who you are)

Email 1: Introduction and next steps
Subject line: Thank you for reaching out (*or personalize in a relevant way*)

Hi [First name],

Thank you for *[customize with action taken such as downloading XYZ earlier this week]*.

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 *[relevant resource]* of interest.

All the best,
[Your name]
[Firm website]

Email 2: Reminder to take the next step
Subject line: Re: Thank you for reaching out

Hi [First name],

Thank you for *[customize with action taken such as 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.

All the best,
[Your name]
[Firm website]

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

Email 3: Re-engage with resources
Subject line: Re: Thank you for reaching out

Hi [First name],

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

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

All the best,
[Your name]
[Firm website]

Email 4: Create urgency
Subject line: 30 minutes over the next week?

Hi [First 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,
[Your name]
[Firm website]

Email 5: Last call
Subject line: Still interested?

Hi [First name],

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

If you have 30 minutes over the next couple weeks 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 and answer some of your questions.

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

All the best,
[Your name]
[Firm website]

Email 6: Goodbye
Subject line:

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

In the meantime, I'm going to say goodbye and add you to our monthly newsletter. If you're not interested, let me know.

All the best,
[Your name]
[Firm website]

P.S. Subscribe to receive [customize].

Sample email templates for cold leads (they don't know you)

These were created using the AI prompt above with ChatGPT. Customize the prompt to make your own series of follow-up emails.

Email 1: Awareness – introduction and value (what's in it for you)
Subject: Can you afford to retire? Let's find out.

Hi [First name],

Are you confident you're on track for retirement? Many people I work with aren't sure if their savings will last or what changes to consider as they approach retirement.

I'd love to offer you a no-obligation **Retirement Readiness Checkup** to help you feel clear and confident about your future.

Click here to schedule a quick chat: [Insert Meeting Link].

Let's make sure you can retire comfortably and on your terms.

All the best,
[Your name]
[Firm website]

P.S. Subscribe to receive [customize].

Email 2: Addressing key concerns – income planning
Subject: Will your retirement income last?

Hi [First name],

A top concern for retirees is whether their income will last throughout retirement. Do you know how to turn your savings into a reliable income stream?

I've helped others like you create a clear income strategy for retirement that accounts for **expenses, taxes, and market risks**.

Schedule a quick 15-minute chat to explore your retirement income plan: [Insert Meeting Link].

Peace of mind is only a conversation away.

All the best,
[Your name]
[Firm website]

Email 3: Education – common mistakes to avoid
Subject: Don't make these 3 retirement planning mistakes

Hi [First name],

Many pre-retirees overlook key retirement risks like healthcare costs, inflation, and market volatility. Avoiding common mistakes can save you thousands.

I've outlined **3 critical mistakes to avoid** in retirement planning here: [Link to a relevant article or blog]. Or, let's connect to see where you stand: [Insert Meeting Link].

I'm here to help ensure you're prepared for whatever retirement brings.

All the best,
[Your name]
[Firm website]

Email 4: Reassurance – overcoming uncertainty
Subject: Retirement uncertainty? Let's bring clarity.

Hi [First name],

Feeling unsure about when or how to retire? You're not alone. Retirement planning can feel overwhelming, but the right guidance makes all the difference.

Let's walk through your unique situation together to determine:

- If you can retire when you want
- How to handle unexpected expenses
- Ways to protect your retirement income

Schedule a time for us to chat here: [Insert Meeting Link].

I'd love to help you feel confident about your future.

All the best,
[Your name]
[Firm website]

Email 5: Final Nudge – limited time offer
Subject: Take the first step toward retirement confidence

Hi [First name],

I know life gets busy, but your retirement deserves attention now. To help you take the first step, I'm offering a **free 15-minute consultation** this week only.

Let's discuss your goals and concerns and see if you're on track for the retirement you've worked so hard for.

Book your session here: [Insert Meeting Link].

Don't leave your future to chance—let's plan it together.

All the best,
[Your name]
[Firm website]

Email 6: Time to say goodbye

Subject: Retiree newsletter full of tips?

Hi [First name],

It doesn’t seem like you’re ready to address your retirement questions or maybe you already have a plan?

Either way, I’m going to say goodbye and add you to our monthly retiree newsletter. If you’re not interested, let me know.

All the best,
[Your name]
[Firm website]