Email Drip Campaign Templates

Use these templates to create drip campaigns that will bring in the right prospects for your firm.

Email 0 – The Autoresponder

SUBJECT: Here's Your Requested Resource

Hi,

Thanks for your interest in **[title of resource]**. Click here to download it now **[this sentence should be hyperlinked]**.

After reading this resource, if you want to learn more about **[insert topic of resource]**, feel free to reply to this email or use the contact info contained in the resource you downloaded to schedule a complimentary consultation.

Take care,

CARSON COACHING

Email 1 – The Feeler

Hi,

I noticed you downloaded **[name of resource]** the other day. This is one of my favorite resources because it so clearly lays out the connection between **[topic]** and your financial future. Regardless, no single resource could answer all of your questions, so it is completely normal to be left with lingering questions.

I'm always interested in learning more about people's individual goals and financial situations, so if you ever want to chat, I'm all ears. Feel free to reach me at this email or call our office anytime.

In addition, we're currently offering a complimentary, 30-minute Retirement Income Review that touches on several of the topics in **[name of resource]**. I think you would find it valuable. Click here to schedule a time to talk **[hyperlink to Calendly/Acuity/contact page]**.

Take care,

P.S. If you missed the resource in my last email, click here to download it now **[hyperlink this sentence]**.

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Email 2 – The BTW

Hi,

Hope all is well. I just wanted to send along an article I thought you'd be interested in since you downloaded our resource on **[topic]** the other day.

This article speaks to **[topic]** from a different perspective **[go on to explain how this covers another aspect of the topic that the original resource didn't]**. Click here to read more **[hyperlink this sentence]**.

If you haven't scheduled your complimentary, 30-minute Retirement Income Review, click here to reserve a time. I would love to learn more about your current situation and where you are on the path to accomplishing your goals.

Take care,

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Email 3 – The Final Word

Hi,

I just wanted to check in one last time to see if you're interested in talking about your retirement income plan. I hope you enjoyed **[resource title]**. If you missed it in the original email, here it is again **[hyperlink to the resource]**.

Here at **[firm name]**, we… **[this is where you insert your value proposition that lets the prospect know that you are the one who can help them address their financial planning issues. Resist the urge to talk about yourself, your firm, and all the awards you have won. Instead, talk about the challenges of retirement income planning and how you can help them overcome them.]**

I have a couple open slots for our complimentary, 30-minute Retirement Income Review this coming week. Click here to save your spot now **[hyperlink this sentence]**.

If you don't feel like now is the time to talk, I hope you'll keep my contact info on-hand. I would love to help you chart a clear course to retirement.

Talk to you soon,