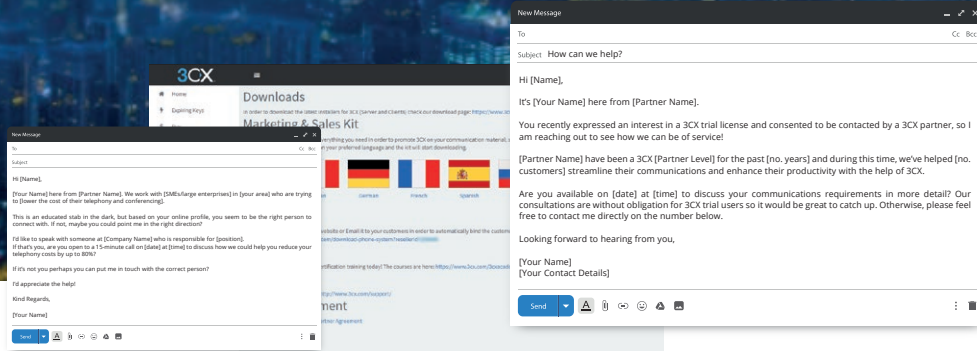


EMAIL TEMPLATES for Prospecting Success



HOW TO USE THESE TEMPLATES

These templates are designed to give you ideas and inspiration. They should not be copied directly.

The guidance notes above each email explain exactly why each element is used and what the desired effect is. Read them carefully in order to understand the techniques used - you'll then find it much easier to adapt the template or write your own emails from scratch.

**Remember the golden rule:
a personalised email is always better than a generic one.**

Try to connect with your prospects on a personal level, the simplest way is to use their name and introduce yourself in the opening sentence, but you may want to reference an award they've recently won, a promotion or a connection in common. **Be creative!**

Don't be afraid to use emoji's, pictures and gifs- studies suggest they improve the open rate. Just don't go overboard and use one or the other, we're providing phone systems not creating comic strips! ;)

CONTACTING A 3CX LEAD

When to use it:

To reach out after you receive a new lead from 3CX.

Why it works:

- The email maintains an informal, friendly tone and clearly introduces you as the lead contact.
- A small amount of detail is shared regarding your company, which provides an insight into your experience of 3CX and how you can help the prospect with their specific needs.
- Referencing the number of customers you've serviced previously will build trust and confidence.
- Setting a specific date and time for the discovery call encourages them to respond and accept/ decline vs "Tell me when you are free"

New Message — ↗ ✕

To Cc Bcc

Subject How can we help?

Hi [Name],

It's [Your Name] here from [Partner Name].








You recently expressed an interest in a 3CX trial license and consented to be contacted by a 3CX partner, so I am reaching out to see how we can be of service!

[Partner Name] have been a 3CX [Partner Level] for the past [no. years] and during this time, we've helped [no. customers] streamline their communications and enhance their productivity with the help of 3CX.

Are you available on [date] at [time] to discuss your communications requirements in more detail? Our consultations are without obligation for 3CX trial users so it would be great to catch up. Otherwise, please feel free to contact me directly on the number below.

Looking forward to hearing from you,

[Your Name]
[Your Contact Details]

Send ▾       ⋮ 

COLD CONTACT EXAMPLE 1

When to use it:

To initiate contact when you haven't spoken previously or when you're unsure as to whether you have the correct contact person.

Why it works:

- This email maintains an informal tone, which helps to make it less 'salesy.'
- The rep is introduced immediately, along with a positioning statement which clearly articulates the value being offered, so the prospect should immediately see the benefit of working together.
- This is compounded by the statistic offered after the meeting invite- which reinforces why they should attend
- Asking to be put in touch is also a smart move, as people have a tendency to want to help others.

New Message — ↗ ✕

To Cc Bcc

Subject [Name], Fancy reducing your communication costs by 80%? 💰

Hi [Name],

[Your Name] here from [Partner Name]. We work with [SMEs/large enterprises] in [your area] who are trying to [lower the cost of their telephony and conferencing].

This is an educated stab in the dark, but based on your online profile, you seem to be the right person to connect with. If not, maybe you could point me in the right direction?








I'd like to speak with someone at [Company Name] who is responsible for [position].
If that's you, are you open to a 15-minute call on [date] at [time] to discuss how we could help you reduce your telephony costs by up to 80%?

If it's not you perhaps you can put me in touch with the correct person?

I'd appreciate the help!

Kind Regards,

[Your Name]

Send ▾       ⋮ 

COLD CONTACT EXAMPLE 2

When to use it:

To initiate contact when you know their existing solution and can highlight clear advantages of using 3CX.

Why it works:

- You look good because it's clear you've done your research and they'll be interested if you show you understand their current solution.
- You can include a pain point that's relevant to their industry e.g if you think cost is likely to be their biggest pain point, reference our competitive pricing as the differentiator.
- They have a choice of how to reach you but not responding isn't presented as an option, giving them an either/or will encourage a response.

New Message — ↗ ✕

To Cc Bcc

Subject We're helping [competitor name e.g. avaya] users [differentiator e.g. streamline their contact centres]

Hi [Name],








I just came across your website and saw you were using [competitors product]. How are you finding it? Here at [your company name], we offer 3CX to our customers.

It's similar to [competitor's product], only [differentiator]. If you're up for it, I would love to jump on a quick call with you and discuss how 3CX could streamline [company name]'s communications even further (and see if it would make sense for us to work together).

Would [date and time] be a good time for you? (Alternatively, you can call me directly on [number]).

Looking forward to hearing from you,

[Your Name]

Send ▾       ⋮ 

FOLLOW UP EMAIL

When to use it:

Use when you've already tried to reach out 2-3 times without success.

Why it works:

- Reinforces the value you can bring and mentions the previous contact without making it negative i.e. *'You didn't reply'*
- Introduces a real-life example of a company near to them, who they will recognise. This adds credibility and trust.
- The free trial (use your lead binding link) gives them the freedom to engage in their own time if they're not ready to talk yet and shows that you're not another pushy salesperson.

New Message — ↗ ✕

To Cc Bcc

Subject 🤖🤖🤖 We have something that could help you

Hi [Name],

Last week I mentioned that [Partner Name] could save you up to 80% on the cost of your telephony compared to your current provider.

We recently enabled [insert local company here] to do just that, by moving them to a 3CX solution.

It would be worth you checking them out - I've attached a link to their trial page below so that you can investigate in your own time.

Please feel free to get in touch if you have any questions,

Kind Regards,

[Your Name]

Send ▾ 🔗 📎 🔄 😊 📁 🖼️ ⋮ 🗑️

CLOSING A CONVERSATION

When to use it:

Use when you've already tried to reach out 3+ times without success.

Why it works:

- The GIF adds a touch of informality/ friendliness that shows you are a real person, not just another robot sales rep sending generic emails.
- It's a friendly way to keep the conversation on good terms should they or you want to reach out again.

New Message — ↗ ✕


To Cc Bcc

Subject Can we talk?

Hi [Name],

Did you have a chance to check out the free trial of 3CX we shared with you last week?

I know you might be thinking:



I have no idea who you are...







But we can still change that!

If you are still interested in 3CX and want to have a chat regarding how [Partner Name] can support with your communications needs please let me know.

I'll stop reaching out for now but feel free to drop me a line if I can assist in the future,

All the best,

[Your Name]

Send ▾       ⋮ 