
Alternative Sales Prospecting Approaches

Using Email Letters

For

**A Client Offering Financial Advisory Services
Targeted to Business Owners to Encourage Purchasing
Services to Plan for Exiting the Business
(Succession Planning)**

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Present Prospecting Letter Sample

The original email letter referenced a trade association the email writer and recipient belonged to. It began with “My name is _____.”

This was followed by statements about the need for succession planning and the reasons for delays in confronting the issues. The email writer reminded the business owner that failing to prepare until the retirement date is close may reduce options and transaction value, stating that the best time to begin is well in advance of leaving the business.

The email writer offered to share a survey report along with a possibility of dropping by to deliver the report in person, and ending with a request to schedule a meeting.

Alternative Sales Prospecting Letter Objectives

Compel Engagement, Create Interest, Develop the Relationship, and Move the Recipient Toward Action

Marketing means to bring alive in the mind of your prospects the possibilities of achieving their dreams. They all have some idea of who they are and what they want to be. When they begin to learn that you know, understand, and can help people like themselves, in similar situations, they will be attracted to you.

Source: “Attracting the Affluent” by John H. Melchinger

Guidelines Used in Preparing Alternative Prospecting Email Letters

1. **Compel attention:** Immediately following opening use a compelling introductory question or assertion that captures the reader’s attention
2. **Focus on “what’s in it” for the reader:** Engage the reader by focusing on issues relevant to him/her rather than attempting to establish credibility or sell
3. **Understand and appeal to letter recipient interests, for example:**
 - Tendency to procrastinate over long-range decisions
 - Need to maximize financial return on hard work
 - Need for continuity in event of disruption
 - Relief from stress of uncertainty concerning eventual withdrawal from the business
 - Answers to questions that can reduce ambiguity and point the way forward
4. **Emphasize benefits:** Less emphasis on the firm’s capabilities. More emphasis on benefits and advantages to the reader
5. **Evoke emotions:** Introduce emotional appeals. Trigger memories. Stimulate visual imagery
6. **Project the tone of a wise, trusted adviser:** Use fresh conversational language the reader relates to
7. **Start the relationship:** Timing is everything! Your recipient may or may not be ready to engage with you. Use the letter to initiate a relationship and follow with a succession of communications that keep you at the forefront as a valued resource. Avoid making the relationship contingent on setting up an appointment
8. **Offer stepped approach to the end objective:** Invite actions ranging from small incremental steps in addition to asking for the appointment
9. **Make the letter skimmer-friendly:** Use short paragraphs, introductory tag-lines, and possibly a P.S.



Email Theme 1 Alternative: Get Ready Now

Introduction from _____ Member

Present Email Subject Line

Or:

CEO – Does luck follow those who look ahead?

Alternative Email Subject Line

A Fresh Look at Lead Times for Major Business Changes

Alternative Email Subject Line

Dear First Name:

What is your reaction when you consider what's next for your business? Are you elated and energized? Apprehensive and unclear?

Have you thought about what's next? Every year our firm surveys business owners. What do we find?

A high percentage of owners delay planning related to succession or turning over their business to others. They wait for higher sales, or for anticipated events, or to be clearer about the future.

My name is _____. You may have a concern similar to another business owner we developed a financial plan with in the XYZ industry. As a Financial Adviser working with business owners, I can offer you my insider observations: Delaying development of a plan until you decide to move away from your business may, unfortunately, limit your ability to benefit from an outcome that reflects your valuable investment.

The blunt truth is that setting up the future on your terms is a multi-phased process with many moving parts. I have steered many others through the planning process and am experienced in working through the challenges. I would like the opportunity to hear your perspective about the challenges you face.

We can cover a few fundamentals in a brief conversation. Would you like to schedule a time for a phone call or meeting? In addition, I will be happy to provide you with our 24-page annual survey report of business owners that covers transitioning from your CEO position into new roles away from the business. I can send this to you or bring it bring it to a meeting. You have my email address and my phone is _____.

I am confident I can provide insights and advice that will help you plan for the future, and on a timeline that favors optimum results.

Respectfully,



Email Theme 2 Alternative: The Business Owners' Edge in 2019

Introduction from _____ Member

Present Email Subject Line

Or

Calling Forward-Looking Business Owners

Alternative Email Subject Line

As a Business Owner, Are You Designing Your Preferred Future?

Alternative Email Subject Line

What smart business owners will do in 2019

Alternative Email Subject Line

Business owners can shift the game in their favor in 2019

Alternative Email Subject Line

You cannot choose the future. And you cannot put it off. But you can prepare for it.

Dear First Name:

You control the decisions for your business. But are you in control of the future of your business? And of your own course over the next months and years?

If you are similar to many business owners we work with in the XYZ industry, you know the need to consciously, formally make decisions, as you've done many times in directing your business. Now may be the right time to plan for the future growth and profitability of your business when you turn over all of those the decisions, joys, and headaches to others.

Planning is the right first step savvy business owners are taking. We can help you join others who are shifting the game in their favor for 2019 and beyond. A plan customized to your concerns and challenges can optimize results when you choose to leave and pursue other interests, including retirement, or even starting another business.

As an experienced Financial Adviser, I and our team have the expertise and the right flashlights to guide you through the twists and turns of the cavernous, bat-ridden cave to reach the clear path ahead. With our guidance you can benefit from a plan that maps the path, along with contingency alternatives to handle unexpected events.

Our most recent annual survey report based on responses from others in your position provides valuable insights into transitioning away from business ownership. If you'll reply to this email with "send report" in the subject line, I'll reply with the report attached, and I'll also include you when we send tips and news that may benefit you. Could we talk about setting up the future that works for you? Would you like to schedule a phone call or meeting at your convenience? Please call me at _____ or email me to set up a time.

Respectfully,



Email Theme 3 Alternative: Move on to Your Next Milestone

Introduction from _____ Member

Present Email Subject Line

Or

Moving on to Your Next Milestone

Alternative Email Subject Line

Opening a New Chapter in Your Life

Alternative Email Subject Line

Dear First Name:

Do you occasionally reflect on your goose-bump moments?

First day of high school, first job, or sendoff to college

Are you looking ahead at new milestones?

New roles, more family time, projects waiting for you, travel, mentoring,
volunteer leadership, and more time to spend as you choose

You may find valuable insights in our annual survey report based on responses from business owners. It covers issues others are encountering as they prepare to transition from their businesses into other roles. I'll be happy to send it to you if you reply with "send report" in the subject line.

As the Financial Adviser to clients who are planning for the future, the most important advice I offer is to "plan ahead," even before you have a timeline for transitioning from your business. As one of my clients told us:

You helped me realize I needed longer range planning. The plan we developed with you set me up to take actions I had postponed, and those actions helped me move ahead with confidence.

Developing a plan establishes your priorities and a step-by-step process that can optimize results when you place your business under the direction of another or transfer ownership.

My purpose in connecting with you is to begin a dialogue about your concerns and the challenges you face as you move toward your future. Are you available for a phone call or meeting? My phone is _____, and you have my email address. I am available to be a sounding board and to share with you the knowledge and perspectives I have gained in working with business owners. Let's get started.

Respectfully,

