## STRATEGY 9: FORM PROFITABLE STRATEGIC PARTNERSHIPS

## Email Template for COIs to Send Thought Leadership Content

## Email Samples for Sending Thought Leadership Content

### EMAIL TEMPLATE

The thought leadership content a COI sends to clients and prospective clients will have a much greater impact when the COI includes a personal message with it.

For example, the COI can mention any recent interactions (“It was great seeing you at the golf tournament last weekend.”), bring up a common concern (“I know that we’re both concerned about keeping our families safe, so I thought of you when I saw this report on personal defense.”) or reference a recent conversation (“Since we were just talking about the possibility of you selling your company, I thought you’d be interested in this report on exit strategies.”)

The email should also mention why the content will be of interest to the recipient and contain a call to action to have a follow up conversation.

The template below can serve as a framework for your COIs to compose these emails. Remember, to be effective, each email should be customized so that recipients know that the COI is thinking about them and their specific situations when they send them content.

Subject line: [Brief phrase that links the content to a concern or interest of the recipient]

Dear [first name(s) of recipient(s)],

[Brief customized message that references a personal connection between the COI and recipient]

[Two or three sentences that introduce the content and explain why it will be of interest to the recipient.]

[One sentence that establishes credibility for the content by referencing its source.]

[Hyperlink to access the content]

[Call to action to start a conversation.]

[Signature]

### EMAIL SAMPLES

Subject line: Helpful report on how to sell a business the right way

Dave,

It was great seeing you at the Rotary Club meeting last week. I always enjoy getting together with that group.

Because you’re a successful entrepreneur, you came to mind when I read this report. It’s all about some major mistakes business owners tend to make when they go to sell their companies—mistakes that can cause them to leave lots of money on the table. It also offers advice on how to avoid those pitfalls and get maximum value for a business. I believe this report will give you a lot to think about!

The report is published by VFO Inner Circle, a global financial concierge group I have on retainer to keep me up to date on the latest research and strategies for addressing the key concerns of successful people like you.

Click here to read the report.

Also, I’d like to set up a time for a phone call to check in with you and discuss any concerns about your business that may have arisen since our last meeting. Please visit my online scheduler to make an appointment at a time convenient for you. Of course, you can also email or give me a call at 888-555-5555.

Best regards,

Jane Attorney

Subject line: Great report on connecting with your kids made me think of you

Nancy and Paul,

It was nice to run into you at the kids’ soccer match last weekend. What a great team they have this year!

I saw this report on how busy parents can create deep connections with their kids, especially teenagers. As you’ll see, research shows that most parents say they don’t spend enough quality time with family, especially their kids. The good news is that there are specific steps we all as parents can take to re-establish and maintain deep bonds with our teenaged kids. The report sets out the steps in very practical ways that I am finding helpful with my own kids, and I thought you would, too.

It’s published by VFO Inner Circle, a global financial concierge group I have on retainer to keep me up to date on the latest research and strategies for addressing the key concerns of successful people like you.

Click here to read the report.

Also, I’d like to set up a time for a phone call to check in with you and discuss any concerns that may have arisen since our last meeting. Please visit my online scheduler to make an appointment at a time convenient for you. Of course, you can also email or give me a call at 888-555-5555.

Best regards,

Phil Accountant