

How to use these templates

These templates are designed for the three stages of lead nurturing, with the goal to arrange your first consultation with a new lead:

1. First contact attempt with a new lead
2. The [10-day follow-up cadence](#)
3. Extended [lead nurturing journey](#)

Each template has **[red text in brackets]** where you fill in the information unique to each situation. **Don't forget to update the red text colour before sending emails.**

First contact attempt on day 1

These templates are designed for first-day contact with your new lead to help you arrange your initial consultation.

Phone call

Hi **[lead name]**, this is **[your name]** from **[your company]**.

I got your details from Unbiased.

Thank you for submitting an enquiry earlier. Is this a good time to chat?

If your lead says no, confirm a time and date for a callback.

In your enquiry, you mentioned you're looking for **[lead's advice query]**. Is this correct?

Allow the lead to elaborate on their query and what they're looking for.

I understand. Don't worry; this is a common question many people have. We've worked with multiple people on **[repeat the issue back to the lead]**, so we have a solid understanding of what's involved.

If possible, elaborate further on your or your company's expertise in the related field, including credentials. An example of work with a previous client works well here.

I understand reaching out for financial advice can sometimes be a bit daunting, but I want to assure you we will do what we can to help you with [repeat the lead's issue].

Once we can address this issue, [highlight the value of having this issue resolved].

Do you have any questions for me? I'm happy to answer any questions you may have.

Answer any questions posed by the lead, ensuring that you remain personable throughout.

I'm reviewing the information you submitted through Unbiased; is it okay if I confirm a few details with you?

Requalify their information.

Perfect, thank you for that.

The next steps would be for us to schedule a first meeting where we can talk through [the lead's issue] in more detail and work to find a solution.

If you are scheduling the meeting on behalf of someone else, make it clear who the lead will be speaking to during this meeting and their relevant experience.

This meeting is free of charge, and you have absolutely no obligation to proceed if you don't want to.

Are you happy to move forward with this?

Great. Should we schedule a meeting for [suggest date and time]?

Find a date and time that works for your lead, be flexible and ensure you confirm a meeting.

We can do this [suggest meeting options, i.e., face-to-face (if so, include destination), video call, or phone call]. What would work best for you?

Great! A [confirmed meeting method] on [confirmed date and time] it is. I'm booking this now.

It was great talking to you today. I'll send over a summary of our conversation today, along with any relevant information you should bring to our meeting, in an email so you have everything in one place.

In the meantime, if you have any questions, please feel free to call or email me; I'm here to help.

Voicemail script

Hi [lead name], sorry to have missed you.

This is [your name] from [your company].

I got your details from Unbiased.

You submitted an enquiry earlier, looking for [lead's advice query].

I'm hoping to schedule a call with you to discuss how I can be of help.

I'll call you again at [give them a date and time of when you'll call back] and send you an email with more information. If there is a better time to reach you, please let me know. You can reach me at [your number].

Looking forward to talking to you.

Text message

Hi [lead name], this is [your name] from [your company].

I got your details from Unbiased as you submitted an enquiry earlier looking for [lead's advice query].

I'm hoping to schedule a call with you to discuss how I can be of help.

I'll call you again at [give them a date and time of when you'll call back] and send you an email with more information. If there is a better time to reach you, please let me know. You can reach me at [your number].

Looking forward to talking to you.

Email template

Subject line: Your matched adviser, specialising in [lead's advice query].

Hi [lead name],

My name is [your name], and I am from [your company].

I got your details from Unbiased.

You submitted an enquiry earlier, looking for [lead's advice query]. I've worked with multiple people on [repeat lead's advice query], so I have a solid understanding of what's involved.

I'm hoping to schedule a call with you to discuss how I can be of help.

You can schedule a meeting at a time that suits you here [hyperlink your appointment scheduling link if applicable], or feel free to call me at [your number].

I'll try to call you again at [give them a date and time of when you'll call back] or if there is a better time to reach you, please let me know.

Looking forward to talking to you.

Kind regards,

[Your name]

If you weren't able to organize your initial consultation at this stage, it's time to launch a consistent contact cadence over the following nine days.

Follow-up cadence after day 1

These templates are designed as part of the [10-day follow-up cadence](#) to arrange that crucial first meeting with your new lead.

Day 2

Phone call: *If you get through, follow the first contact phone call script.*

Voicemail: *If you don't get through, leave a new voicemail message.*

Hi [lead name],

It's [your name] from [your company]; apologies for missing you again.

I got your details from Unbiased after you submitted an enquiry for [lead's advice query].

I'm hoping to schedule a call with you to discuss how I can be of help.

I'll call you again at [give them a date and time of when you'll call back]. You can also reach me at [your number].

Speak soon.

Day 3

No contact.

Day 4

Phone call: *If you get through, follow the first contact phone call script.*

Voicemail: *If you don't get through, leave a new voicemail.*

Hi [lead name],

It's [your name] from [your company]; sorry I missed you again.

I received your enquiry via Unbiased regarding [lead's advice query], and I'd love to arrange a time to chat about how I can support you.

I'll try calling again on [give them a date and time of when you'll call back], but feel free to reach me sooner on [your number].

Looking forward to speaking with you.

Email: *And send them a new email.*

Subject line: Your matched adviser, let's schedule a call.

Hi [lead name],

I'm [your name] from [your company]; thanks for your recent enquiry through Unbiased.

You mentioned you were looking for help with [lead's advice query]. We've supported many clients with similar needs, so I'd be happy to explore how we can assist you as well.

If you'd like to book a time that works for you, you can do so here: [hyperlink your appointment scheduling link]. Alternatively, feel free to call me at [your number].

I'll also try reaching you again on [give them a date and time of when you'll call back].

Looking forward to connecting.

Kind regards,
[Your name]

Day 5

No contact.

Day 6

Phone call: *If you get through, follow the first contact phone call script.*

Voicemail: *If you don't get through, leave a new voicemail.*

Hi [lead name],

It's [your name] from [your company]; we seem to keep missing each other.

I got your details from Unbiased after your enquiry about [lead's advice query], and I'd really like to see how I can help.

I'll give you one more call on [date and time of when you'll call back], but if it's easier, feel free to call me directly on [your number].

I hope to speak soon.

Text: *And send a new text message.*

Hi [lead name], this is [your name] from [your company].

I'm just following up again about your enquiry through Unbiased.

Let's arrange a call to see how I can help.

I've sent an email with all my details, but feel free to call me back on this number.

I'll try you again on [give them a date and time of when you'll call back].

I hope to speak soon.

Days 7-9

No contact.

Day 10

Phone call: *If you get through, follow the first contact phone call script.*

If you're still unable to reach your lead after this phone call, it's time to put them into your longer-term nurture journey.

Extended lead nurturing journey

These templates are designed for the [six-month lead nurturing journey](#) to help you build trust and convert leads who weren't immediately ready for advice.

Email 1

Subject line: [lead name], let's schedule a call

Hi [lead name],

It's [your name] here from [your company].

In your enquiry via Unbiased, you mentioned you're looking for help on [lead's advice query].

I understand how hard it can be to find an answer to [lead's advice query].

Thankfully, I've been there before.

A number of clients I've worked with have also needed help with [lead's advice query], so I know I can be of help.

[Go into more detail about your experience in this specific area.]

Let's schedule a call to discuss everything in more detail.

Feel free to schedule a meeting at a time that suits you by clicking here

[hyperlink your appointment scheduling link if applicable] or call me at [your number].

Looking forward to talking to you.

Kind regards,

[Your name]

Emails 2-10

Emails 2-10 will follow the same format – some industry-specific news they would be interested in, and a reminder to schedule a meeting. Please edit the following template for each email in the nurture cadence.

Subject line: [lead name], the latest on [lead's advice query]

Hi [lead's name],

Are you still concerned about [lead's advice query]? / Is [lead's advice query] still on your radar? / Have you heard the latest about [lead's advice query]?

[Insert relevant and timely news, including how it could impact them, about the advice area your lead has submitted their enquiry for.]

[Insert how your experience with the advice area. Include any recent experience, especially if it relates to the news above.]

With this in mind, I just wanted to remind you that I am still available for a meeting to discuss your specific needs.

You can schedule a meeting at a time that suits you by clicking here [\[hyperlink your appointment scheduling link if applicable\]](#) or by calling me at [\[your number\]](#).

I'm on hand to help.

Looking forward to hearing from you.

Kind regards,

[\[Your name\]](#)

Final email

If your lead has still not engaged after 6 months of consistent contact, it's time to let them go.

Subject line: This is my last email to you.

Hi [\[lead's name\]](#),

I noticed you haven't interacted with an email from us in a while.

I will remove you from our mailing list for now.

If you'd like to opt in to receive regular industry updates, you can do so here [\[include your newsletter subscribe link, if applicable\]](#). However, we won't be reaching out to you again personally.

If you're still interested in receiving financial advice or would like to reach out in the future, please feel free to contact me at [\[provide your contact details\]](#).

Kind regards,

[\[Your name\]](#)