

Standardized Email Format Increases Client Engagement

Spend less time writing emails and gaining information from clients by using a standardized email format rather than a “wall of text”. Instead of asking clients what to do next; provide them with the steps they need to take. After all, they look to you for advice and guidance.



What should be included:

- **Greeting.** Make it short, to the point, and informative. One to two sentences is enough.
- **Bullets.** Leverage a bullet list to keep content short. Consider links to content on our website for more information.
- **Next Steps.** Also in a bullet format, describe the actions/next steps you or the client should take to move forward.
- **Call to Action.** In one or two sentences, describe to the client what he/she needs to provide for you to continue with next steps.
- **Closing.** Sign off with your firm’s tag line or standard closing statement. Be sure to include any social media links to your firm’s profiles or company pages.

Example

In this example, we are notifying clients about a looming Employee Benefit Plan Form 5500 filing deadline. We share:

Standardized Email Format Increases Client Engagement

1. Why the message is being sent;
2. Important tips about the filing;
3. Next steps, giving recipients easy access to information they need;
4. A call to action, so the recipient knows what is expected of him/her;
5. A closing with our firm's standard closing line; and
6. Signature, with links to social media to help inform clients of our online channels.

Additional Email Tips

Remember to consider your subject line when sending client emails. Here's a fun tip to remember, talk about the candy, not the wrapper, for example, rather than this subject line "Avoid Penalties With These Form 5500 Tips," tell the reader what's in the email, such as "5500 Deadlines Looming - Tips to Prepare."

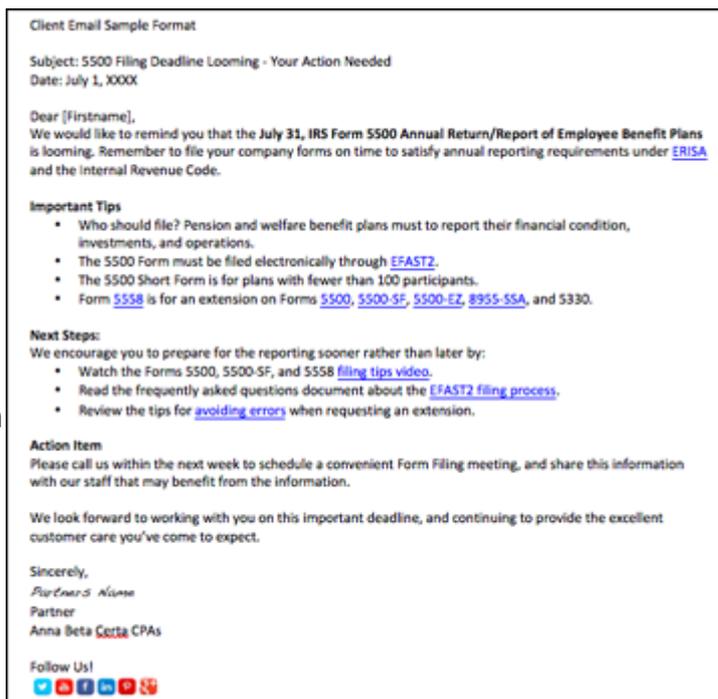
Also:

- **Emphasize the personal value of your content.** Subject lines that make readers think "This is useful." "This is timely." "This is about me."
- **Keep subject lines short.** Try to keep it under 75 characters.
- **Keywords.** Use a keyword in the subject line to help with SEO. Try to get the keyword as close to the first word as possible.

Subject Line Formula

Rather than trying to think of a catchy email subject line every time, use a formula to help. Here are some examples, where "blank" would be one of your firm's targeted keywords:

- Who Else Wants [blank]?
- The Secret of [blank]
- Little Known Ways to [blank]



Click to view a larger image.

Standardized Email Format Increases Client Engagement

- Get Rid of [problem] Once and For All
- Here's a Quick Way to [solve a problem]
- What Everybody Ought to Know About [blank]

Additional Resources

- [2018 Marketing Prep Checklist](#)
- [7 Reasons Why Your Email Open Rates May Be So Low](#)
- [Email is Still Your Ace in the Hole](#)
- [How Buying Email Lists Can Get You Into Trouble](#)

Your Turn

Which of these tips will come in most handy for your firm or company? Share your comments below.