From Proposal Requests to Getting Approvals: 6 Email Templates to Make Agency Communication Easier
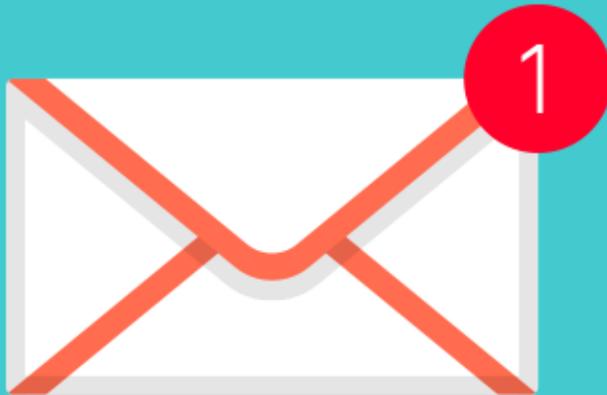
When you've got an important email to write, it can seemingly take hours.

You write, revise, delete, and agonize over every word, link, and even your email signature.

And if you are selling your staff's time in the form of the billable hour, this can be a huge waste of resources.

While we're talking about one-on-one communication, it's a worthwhile pursuit to create a library of canned email responses or templates that your team can use for specific activities or in response to clients.

It ensures that the communication from your team is clear and consistent, makes it easier to respond to requests more quickly, and removes the uncertainty that junior staffers feel when dealing with a difficult situation.

Below you'll find a starting point for building out your library of email templates that can be customized.

Use these to make your client communication more efficient.

6 Email Templates for Communicating With Clients

1) When a Prospect Requests a Proposal

Next steps

Hi [First Name],

Thank you for your interest in [Agency]. We've worked with many companies that have struggled with [Key Challenge]. You can read up on the successes of our previous relationships here [Link] and here [Link].

We don't create proposals at this point in the process as we're a results-driven agency, meaning we need to better understand your business, challenges, and needs to be able to determine if and how we can help. Because of this focus, we only take on a certain number of new accounts per year -- those clients who we are confident we can produce results for.

I'd love to schedule a call or in-person meeting to learn more about your marketing and sales goals for the year, your current marketing activities, and how our agency could work to improve results for [Company Name].

Here are a few dates and times that would work for us.

- [Date and Time]
- [Date and Time]
- [Date and Time]

Looking forward to chatting.

Best,

2) When a Client Requests Out-of-Scope Work

RE: Additional Content Projects

Hi [First Name],

Thanks for sending over the information on the additional content pieces you would like us to create prior to the launch of the new website. It's a great idea, and I think they will add a lot of value to visitors who are unfamiliar with your brand and products.

I've gone ahead and updated the scope of work [Link or Attach] to include these two new content projects, which you will see reflected in the revised quote. The price for the additional content offers comes to [$X,000]. Take a look, and let me know if you have any questions. Once you approve, I'll add those two projects to [Project Management Tool] where you'll be able to review and track the timeline for completion and approvals.

Thanks,

Send ⏱

3) To Send Over a Project for Approval

Website Redesign Comps

Hi [First Name],

I hope you're ready!

The team just finished up the design comps for the redesign of the homepage, and I'm so excited to show them off to you. I think you'll find that while the two versions are very different, they both solve the problem of your visitors failing to understand how easy to implement your solution is.

But first, we want to highlight a few things from the approved creative brief to set the stage:

- [Target audience]
- [The problem the design should solve]
- [The action viewers should take]
- [The emotion/feeling people should have when viewing]

Now, here are the design mockups with an accompanying description of why we made certain decisions.

- Version 1 [Link]
- Version 2 [Link]

After viewing these, please let us know if you have any opinions on the following for each design:

- What's memorable?
- Which do you think will appeal more to your target audience?
- Is the messaging in line with the needs/challenges of your visitors?
- Is the call to action compelling and clear? Could we do anything to improve this?
- Which one do you think will perform better with your target visitors?

As we mentioned in our last meeting, we think it would be valuable to do a heat mapping test on these two version to determine which converts at a higher rate. Here's a [Link] to the description of the project and price for that test.

If you'd like to have a call to discuss this, click here [Link to Online Booking Calendar] to schedule time on my calendar.

Thanks,

4) To Follow Up With a Client

Following up on the design comps

Hi [First Name],

I wanted to follow up with you to see if you have any feedback on the design comps I sent over late last week. Please let me know if you have any suggestions/questions or inform me of your approval of one of the designs.

To meet the requested launch day of [Date], we will need at least [# of Days or Weeks] for development and testing. If I don't receive your approval by [Date], we'll have to push back beginning on Phase II of the project, which will impact the final delivery date.

I'll follow up by phone if I don't hear from you by tomorrow morning.

Thanks,

5) When You Need to Push a Deadline

Important information on the website launch date

Hi [First Name],

I'm checking in with some news on the project. Everything looks really good right now, as you saw during our check-in last week, but we actually encountered a problem that will impact the original launch date. We're not going to be able to meet the original due date because of [List Reasons]. While this is something we discussed was a risk factor that could impact the launch date during the project scoping, we were hoping it could be avoided. We're doing everything we can to minimize the impact, including [State Actions Taken].

Based on the timeline of the vendor, I've adjusted the milestones, including your review and approval dates, in [Project Management Tool]. The new final delivery date is set for [Date].

I apologize for any negative consequences this may have on your schedule. I'd be happy to discuss how we can help to reduce the impact of any issues due to the change.

Please give me a call to discuss this further if you'd like, or you can schedule a time with me here [Link to Online Booking Calendar].

Best,

6) To Ask for a Testimonial

RE: June Results

Hi [First Name],

I was very happy to see the results of the analysis of the website redesign's impact on Q3 marketing and sales -- as I'm sure you were.

On that note, I was wondering if you would give us permission to showcase the project on our website. And if so, would you be able to write 4-5 sentences that describes your experience working with us: What did you like about working with us? What results have you seen? Why will other clients like you enjoy working with our team? We'd love to feature the project, your testimonial, and your name/headshot in a call out on our site. If you'd like some inspiration, here are a few examples [Link] of kind words from previous clients.

Let me know if you have questions or need more information. We really enjoyed working with you on this project.

Thanks,