Outreach templates

Cold email for a first user and a first client, a forwardable warm intro, LinkedIn notes, a three-step follow-up, and a one-page pilot proposal.

Every template is a shape, not a script: rewrite each one for the person in front of you, in your own voice, and keep it short enough to read on a phone. Write the first five by hand before you let an assistant draft from them - and you still edit and send every one.

1. Cold email to a potential first user

Subject: [their problem], at [their company]

Hi [first name],

I saw [the specific thing - a post, a job ad, a review, a mutual contact] and it looked like [the problem in their words] is something you deal with.

I'm building [one line: what changes for someone like them]. It's early - ten people are using it - and I'm looking for a few more who'd try it for a week and tell me honestly where it falls short.

Would that be worth fifteen minutes this week? If not, a one-line reply saying so helps too.

[Your name]
[Company] - [website]

2. Cold email to a potential first paying client

Subject: [outcome] for [their team / function]

Hi [first name],

[Reason you are writing to them specifically - one line.]

Teams like yours told us [the problem] costs them [the cost you heard in interviews: hours a week, a number, a risk]. [Company] [what it does, one line]. [Named customer or user] used it to [result].

I'd like to show you how it would work on your [data / workflow] - fifteen minutes, and I'll send a one-page pilot proposal afterwards if it makes sense.

Does [day] or [day] suit?

[Your name]
[Company] - [website]

3. Forwardable warm introduction (you write it, your connector forwards it)

Subject: Intro to [your name] - [one line of what you do]

Hi [connector's first name],

Could you forward this to [prospect]? Feel free to edit.

[Prospect first name] - [your name] is building [one line]. They've been talking to [their type of role] about [the problem] and have a working version a handful of teams use. They'd value fifteen minutes to hear how you handle it today - no pitch unless you ask. Here's [your name]'s email: [email].

Thank you - happy to return the favour any time.
[Your name]

4. LinkedIn

Connection note (under 200 characters):
Hi [first name] - I'm working on [problem area] and your post on [topic] was the most useful thing I read this week. Would like to follow your work.

Message after acceptance (a day or two later):
Thanks for connecting. Quick question if you have a second: when [the problem] comes up for your team, what do you do about it today? I'm trying to understand it properly before building more.

5. Follow-up sequence (each adds something)

Day 3 - add a proof:
Hi [first name], one thing I didn't mention: [a specific result, a short screenshot, a relevant number]. Still happy to show it in fifteen minutes if useful.

Day 7 - answer a question they didn't ask:
Hi [first name], a lot of [their role] ask me about [common objection - security, pricing, integration]. Short answer: [one line]. If timing is wrong, tell me when to come back.

Day 14 - the honest close:
Hi [first name], I'll stop here so I'm not in your inbox for no reason. If [the problem] comes up again, I'm one reply away - and if it's a no, a one-word reply helps me too. Thanks for reading.

6. Subject lines that get opened

- About them, not you: '[their process] at [company]', 'your [post / talk] on [topic]', '[mutual contact] suggested I write'.
- Short: two to five words. No 'quick question', no 'partnership', no exclamation marks.
- Follow-ups reply in the same thread - do not start a new one.

7. Pilot proposal (one page)

Section	What goes in it
Goal	The one outcome the pilot proves, in the buyer's words.
Scope	Exactly what is included, for whom, on what data. One sentence on what is excluded.
Dates	Start date, end date (four to eight weeks), review meeting a week before the end.
Price	A real price, paid at the start. State what the annual price will be if it converts.
Success criteria	Two or three measurable things agreed with the buyer.
What happens at the end	Converts to [annual contract at price] or stops. No silent extension.
What we need from you	A contact, access, a kickoff call, feedback at the midpoint.
Signatures	Both sides, electronically.

Notes by place

- India: WhatsApp is normal for business follow-ups once you have met or emailed - ask first. Add the GST clause and 30-day payment terms to the pilot; Udyam-registered sellers have a 45-day statutory limit behind them.
- UAE: Procurement is formal; a pilot proposal on letterhead with VAT shown goes further than a chat message. Expect a vendor registration form.
- Global: Check the anti-spam law of the recipient's country before sending at volume; keep an unsubscribe line in anything sent to a list.

> General information as of October 2026. Not legal, tax or investment advice; fees, thresholds and programme terms change - check the official page before relying on a figure, and use a qualified professional where the roadmap says so.