

Lead Nurture Email Templates

for Zoho Partners

Disclaimer- Zoho CRM and other related resources have been mentioned in the below email templates for illustrative purposes only. Feel free to customize it to suit your Zoho product specialisation.



Intro to the Partner Company

New Mail

From

To

Day 01

Subject

Start exploring your Zoho CRM Free trial!

Hey there,

Congratulations on starting your Zoho CRM trial. We are thrilled to work with you!

Your trial period is for 30 days, and we hope you take this time to explore everything that the service has to offer. Zoho CRM is packed with several powerful features, which our implementation experts can guide you through. We suggest you schedule a consultation call at your earliest convenience to help you get started right away.

Schedule a consultation

How do we help?

With over XX years of experience working with the A, B, and C industries, our team of professional, responsive, and knowledgeable CRM experts are capable of delivering a perfect solution that can cater to your particular needs. We can streamline the entire process of setting up Zoho CRM for your business, from start to finish, allowing you to dedicate your time toward your customers and growing your revenue.

To learn more about us and how we have helped companies like yours accomplish more with Zoho, [check out our industry case studies](#).

Begin your Zoho journey!

The best way to understand Zoho CRM and everything it has to offer is to [jump right into it](#). Although there are a lot of advanced features—discovering which may require some support from our end—there's still a lot you can explore on your own. Feel free to get in touch with one of our experts if you have any questions. We look forward to working with you!

Schedule a consultation

Best regards,
{Email Signature}

If you'd like to know more about us, check out our-

- [Customer case studies](#)
- [Client testimonials](#)

CTA Attach your calendar bookings page here.

Attach most recent and relevant case studies to add value to your lead nurture email, build trust, and show social proof.

Attach onboarding resources you built to help showcase your expertise.

CTA Attach your calendar bookings page here.

Attach your custom-created resources.

Consultation Confirmation Email

New Mail

From

To

Subject

You are on track to maximising your Zoho CRM trial!

Hey there,

Thank you for scheduling a consultation with us! Your session is confirmed for 25th June, 2024 at 3:30 PM. We are excited to work with you and help your business do more.

Below are a few recommendations before we get on a consultation call to help you get the most out of it.

- To start, please fill out this [implementation questionnaire](#) to help us understand your business better and what you're hoping to get out of Zoho.
- Email us a comprehensive list of requirements agreed upon by you and your team. This will help us get on the same page during the meeting and keep it focused.
- If possible, plan to show us how you currently manage your customer data, whether you use another CRM, a custom app, or spreadsheets. This will help us visualize your objectives better.
- Invite any relevant stakeholders to the consultation call. Getting everyone aligned from the beginning can help streamline the process and reduce the time it takes to get your new CRM set up and running.

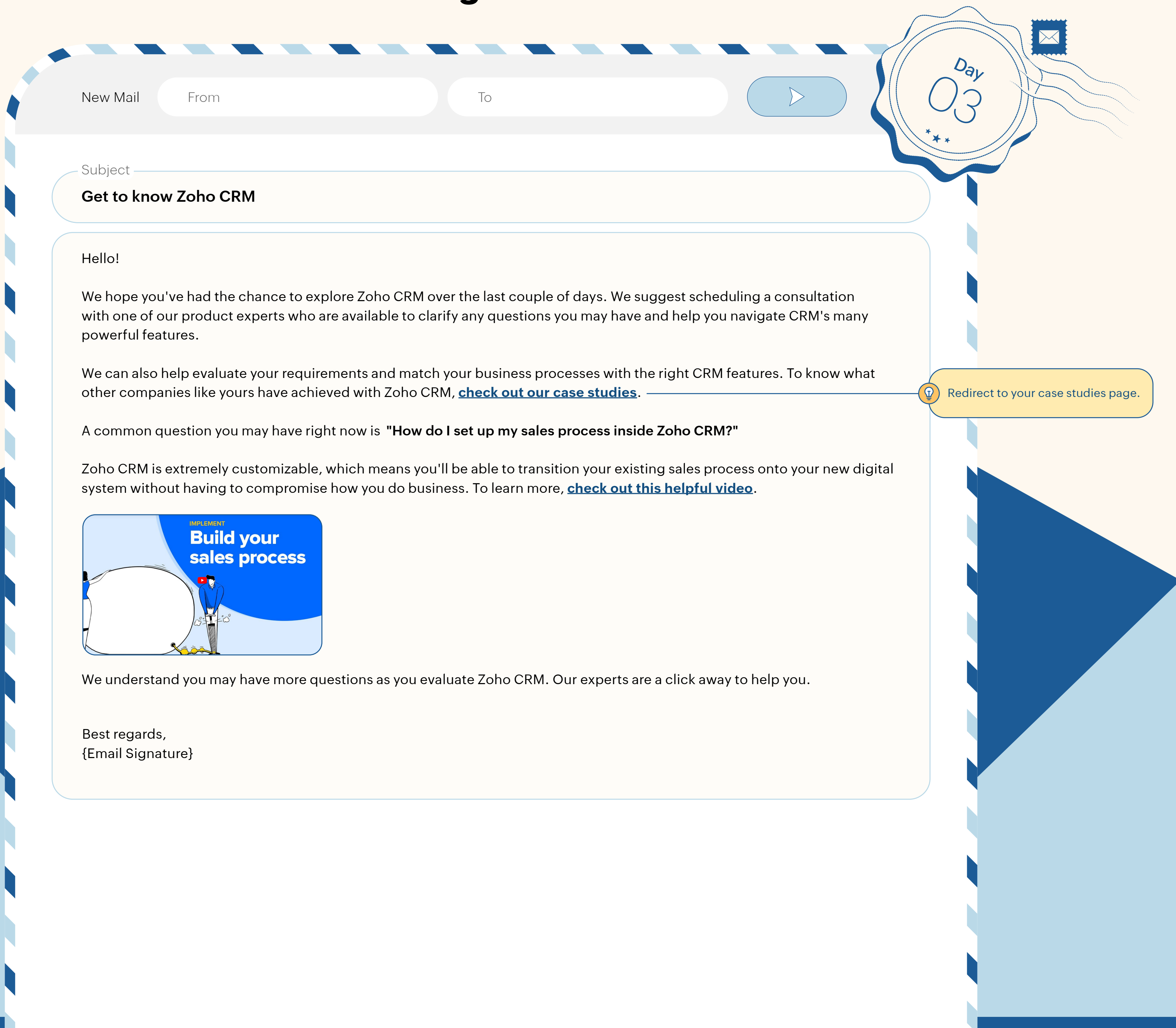
The more information we have about your business and requirements, the more productive our conversation will be. However, if you are unable to execute the above recommendations, don't worry! We can still have a very fruitful initial discussion.

If you have any questions, please do not hesitate to reach out to us.

Speak to you soon,
{Email Signature}

Attach your customized, product-specific implementation questionnaire.

Starting Free Trial



New Mail

From

To



Subject

Get to know Zoho CRM

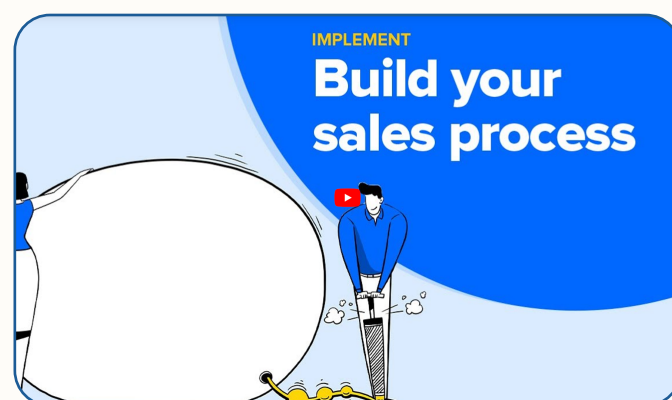
Hello!

We hope you've had the chance to explore Zoho CRM over the last couple of days. We suggest scheduling a consultation with one of our product experts who are available to clarify any questions you may have and help you navigate CRM's many powerful features.

We can also help evaluate your requirements and match your business processes with the right CRM features. To know what other companies like yours have achieved with Zoho CRM, [check out our case studies](#).

A common question you may have right now is **"How do I set up my sales process inside Zoho CRM?"**

Zoho CRM is extremely customizable, which means you'll be able to transition your existing sales process onto your new digital system without having to compromise how you do business. To learn more, [check out this helpful video](#).



We understand you may have more questions as you evaluate Zoho CRM. Our experts are a click away to help you.

Best regards,
{Email Signature}



Redirect to your case studies page.

How was your first week with Zoho CRM

New Mail

From

To

Day 07

Subject

7 days of Zoho CRM. How's it going?

Hello,

You have just completed your first week of your Zoho CRM trial. We hope you've had time to explore the product. We would love to hear more about your journey so far!

We are always here to help!

The best way to swiftly implement advanced CRM features is to schedule a consultation call with one of our product experts. This way, we can assess your needs and build a customized implementation plan that works for your business.

Chart your sales process from start to finish

One of our favourite features of Zoho CRM is Blueprints. With [Blueprints](#), we can visually map out your entire sales process so every executive can effortlessly follow the same process. Not to mention, with well-crafted Blueprints in place, you can rapidly train and scale your sales team.

Explore the possibilities of automated sales

With professional implementation, you can deploy sophisticated automated triggers that guide your leads through your entire sales pipeline. If you're interested in learning how your business can benefit from automation, check out Zoho's ebook, [Automate your sales processes with Zoho CRM](#), to get an overview of what we can do.

Feel free to reach out to us for a walk-through of how you can utilize Zoho CRM to streamline all your unique sales processes, save your time, and help you close deals quicker.

Schedule a consultation

Best regards,
{Email Signature}

CTA Attach your calendar bookings page here.

Mid-point of Trial

New Mail

From

To

Day 14

Subject

Let us help you do more with Zoho CRM on your trial.

Hello,

You are halfway through your month-long free trial, and we hope you've been enjoying using Zoho CRM so far. We wanted to check-in and make sure you are getting the most out of the service. If you haven't connected with our experts yet, we suggest scheduling a call as the first step to learning about what Zoho CRM can do for your business.


Schedule a consultation

If you'd like to continue exploring Zoho on your own, here are a few advanced features you shouldn't miss out on:

Real-time notifications from every touchpoint

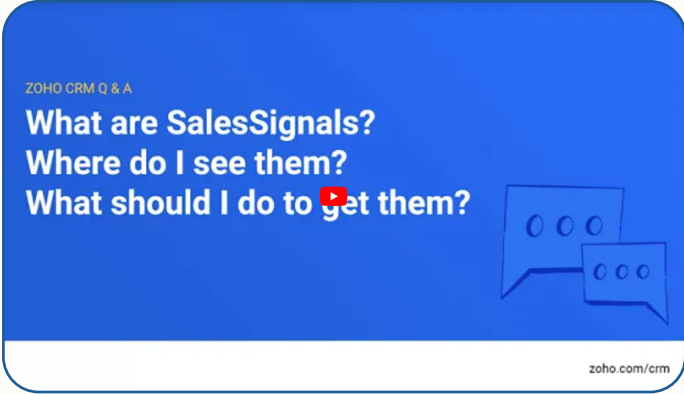
Sales Signal a centralized, custom notification system within Zoho CRM that instantly alerts team members of any new actions taken by their contacts—this allows the rep to react quickly before the deal goes cold. We can help your team set up SalesSignals to monitor any relevant touchpoints across your entire sales funnel.

Here is an overview of **Sales Signals**. You can watch [this video](#) to get an overview of the features, where to find them, and what you need to do to get them.



ZOHO CRM Q & A

What are SalesSignals?
Where do I see them?
What should I do to get them?



Artificial intelligence powered by Zia

The Enterprise and Ultimate editions of Zoho CRM include a particularly powerful feature: Zoho's **AI business assistant**, Zia. By offloading labor onto your new AI, your team will have the information they need to convert more leads and drive more sales.

If you have any other queries, feel free to drop a message to us.

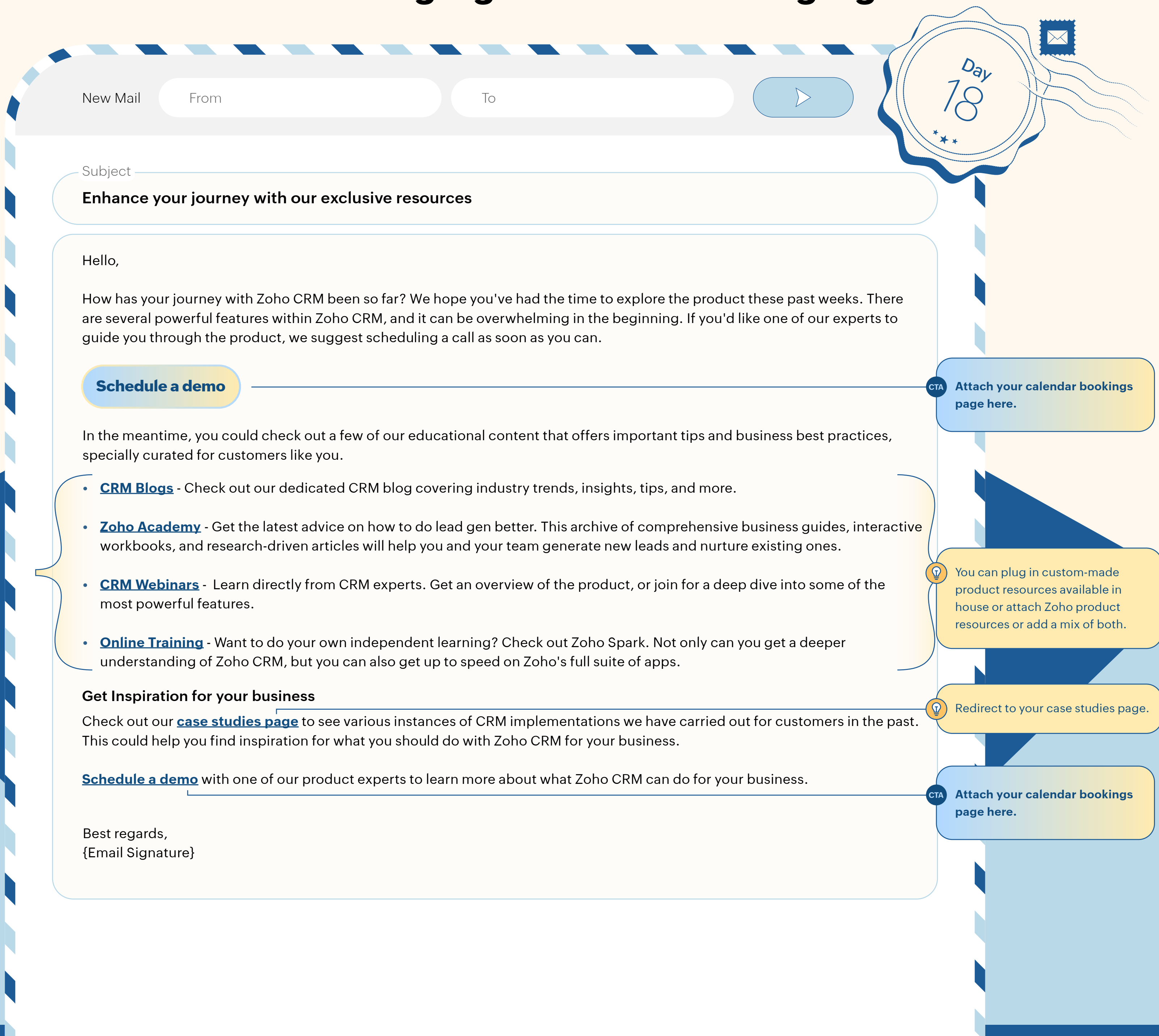
Contact Us

Best regards,
{Email Signature}

CTA Attach your calendar bookings page here.

CTA You can attach a custom contact form or add your email.

Content Resources highlight + Case Studies highlight



New Mail

From

To



Subject

Enhance your journey with our exclusive resources

Hello,

How has your journey with Zoho CRM been so far? We hope you've had the time to explore the product these past weeks. There are several powerful features within Zoho CRM, and it can be overwhelming in the beginning. If you'd like one of our experts to guide you through the product, we suggest scheduling a call as soon as you can.

Schedule a demo

In the meantime, you could check out a few of our educational content that offers important tips and business best practices, specially curated for customers like you.

- **[CRM Blogs](#)** - Check out our dedicated CRM blog covering industry trends, insights, tips, and more.
- **[Zoho Academy](#)** - Get the latest advice on how to do lead gen better. This archive of comprehensive business guides, interactive workbooks, and research-driven articles will help you and your team generate new leads and nurture existing ones.
- **[CRM Webinars](#)** - Learn directly from CRM experts. Get an overview of the product, or join for a deep dive into some of the most powerful features.
- **[Online Training](#)** - Want to do your own independent learning? Check out Zoho Spark. Not only can you get a deeper understanding of Zoho CRM, but you can also get up to speed on Zoho's full suite of apps.

Get Inspiration for your business

Check out our **[case studies page](#)** to see various instances of CRM implementations we have carried out for customers in the past. This could help you find inspiration for what you should do with Zoho CRM for your business.

[Schedule a demo](#) with one of our product experts to learn more about what Zoho CRM can do for your business.

Best regards,
{Email Signature}

CTA

Attach your calendar bookings page here.



You can plug in custom-made product resources available in house or attach Zoho product resources or add a mix of both.



Redirect to your case studies page.

CTA

Attach your calendar bookings page here.

Offer Trial Extension

New Mail

From

To

Subject

Your CRM free trial is ending soon!

Hello,

With nine days left on your trial of Zoho CRM, we hope you've had a chance to experience our software fully! We understand you might have much to think about and numerous options to evaluate, so please let us know if you have any questions.

If nine more days doesn't seem like enough time to evaluate the product in-depth, let's [schedule a demo](#). We can discuss your business, your requirements, and how to proceed with your implementation. With those details in hand, our team can extend your trial period.

Feel free to reach out to us in case of any questions.

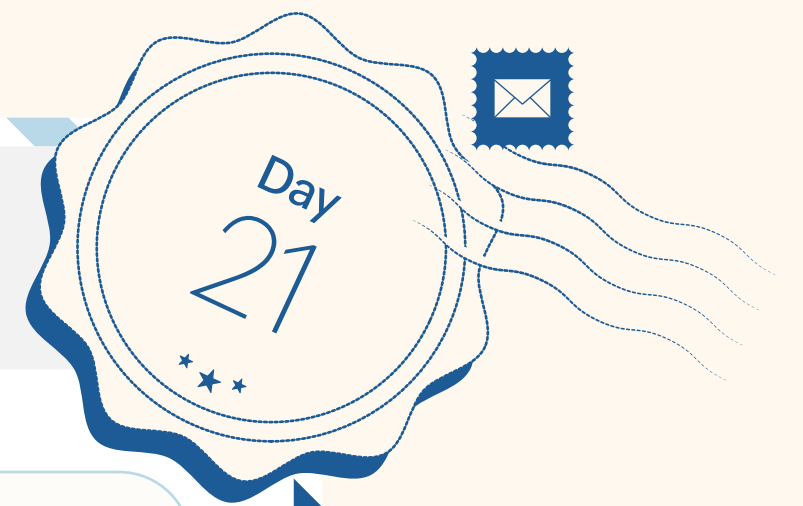
Best regards,
{Email Signature}

CTA

Attach your calendar bookings page here.

Day 21

7 days left on free trial



New Mail

From

To



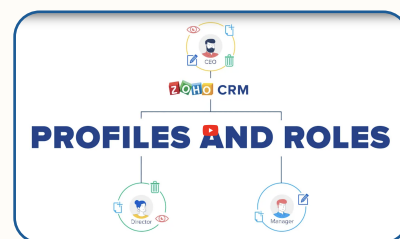
Subject

We are nearing the end of your trial!

We hope you've had a chance to explore Zoho CRM over the last few weeks. We're here to help if you have any questions. However, if you'd rather set things up yourself, here are a couple of places you'll want to pay particular attention to

Protect your data with roles and permissions

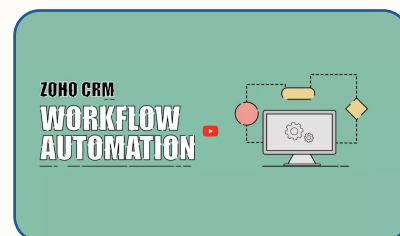
Do you have multiple potential CRM users in your company? You can recreate your organization's structure in Zoho CRM with in-depth, customizable roles and permissions. You'll be able to control who has access to view or edit every facet of your valuable sales data. Check out [this video](#) to learn how:



Experiment with workflows

The right workflow automations can transform how your sales team manages their pipeline. With a little effort, you can map your sales process into Zoho CRM, reducing the amount of manual work your sales team has to do each day. Even a simple rule—such as a "send a reminder email two weeks after first contact"—can boost your close rate. But, the more familiar you are with the system, the more complex your rules can become. If you let yourself get creative, you'd be surprised how much of your sales process can be automated.

Check out [this video](#) to learn how to start using workflow automation in Zoho CRM:



For a more in-depth breakdown of Zoho CRM's core features, you can also check out Zoho's [how-to video page](#).

If you're interested, there's still time to [schedule a demo](#) with one of our implementation experts! We're here to help make this the transition to a new CRM as easy as possible.

Schedule a demo

Best regards,
{Email Signature}

CTA

Attach your calendar bookings page here.

1 day left

New Mail

From

To

Subject

One more day to go! Extend your trial now!

Hello,

If you're interested in continuing to use Zoho CRM, we encourage you to compare the features and pricing between [the different versions of Zoho CRM](#). With five different tiers—all priced competitively against other products in the market—you can choose the plan that fits your needs best.

Need a little more time? Let us know!

If you're not quite done exploring the trial version of Zoho CRM, just let us know. We can discuss what you're looking for, and offer you a trial extension.

Schedule a conversation

If you don't choose a paid edition in the next three days, your account will be switched automatically to the Forever Free plan. The advanced features of the product will be disabled, but your data will still be accessible. Feel free to add to two other users and manage your sales pipeline going forward.

Best regards,
{Email Signature}

CTA Attach your calendar bookings page here.

Day 29

END OF TRIAL

New Mail

From

To

Subject

Head's up! Your Zoho CRM trial ends today

Your trial of Zoho CRM is complete. Over the last 30 days, we hope we've been able to help you discover the potential that Zoho can bring to your business. If you haven't signed up for a paid account with Zoho CRM, you will be switched automatically to the Free plan. Your data will be safe, but some of the features you've been exploring may no longer be available. To learn more about which features are included in the different editions, you can consult Zoho CRM's [feature guide](#).

Need a little more time? Let's talk!

Reach out to us for a demo. We'll discuss your business' software needs, and we can extend your CRM trial if you need more time with the product.

Schedule a conversation

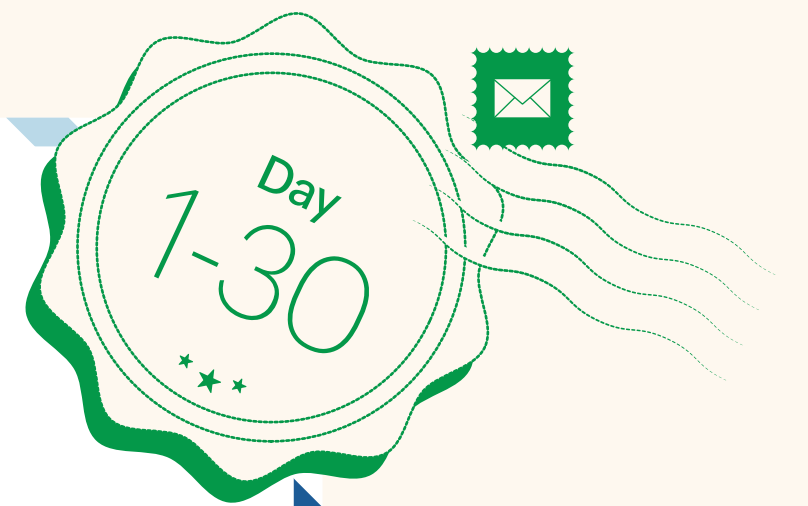
If you have any questions—now or in the future—please don't hesitate to contact us. We wish you the best in your software journey!

Best regards,
{Email Signature}

Day 30

CTA

Attach your calendar bookings page here.



Zoho
Partners

Building Success Together

zoho.com/partners

