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**Template: OBM Introduction to New Client - Systems Vault**

**If you haven’t met them yet**

Subject Line: Welcome to Sarah Noked OBM!

Hi XXX,

My name is XXX, your new Online Business Manager at Sarah Noked OBM. Sarah has brought me up to speed on the projects and tasks that you’ll be bringing to our team, and I’m SO EXCITED to be working with you to systematize, automate, and better organize your business as it continues to grow.

As your OBM, I will be your main point of contact. I'll be in charge of keeping all of your projects organized, moving forward, and making sure all the moving pieces are assigned to the relevant team members. Furthermore, I'm your girl if anything comes up that requires our team's immediate attention.

I'll be joining you in tomorrow's meeting and in future meetings. Our team is passionate about building personal business relationships despite the fact that our work is entirely virtual. I’d like you to be able to put a face to the name of the person who will be so intimately involved in accelerating your business and putting your ideas into action.

Looking forward to working with you,

XXX

**If you’ve met them (in a d-call or some other platform)**

Subject Line: A formal hello :)

Hi XXX!

Just dropping a line to introduce myself as your designated Online Business Manager here at Sarah Noked OBM! I’m SO excited to be working with you to systematize, automate, and better organize your business as it continues to grow.

As your OBM, I will be your main point of contact as work on your projects commences. I'll be in charge of keeping all of your projects organized, moving forward, and making sure all the moving pieces are assigned to the relevant team members. Furthermore, I'm your girl if anything comes up that requires our team's immediate attention.

I'll be joining you and Sarah in your Getting Down to Business Call at the end of the month (don't forget to reserve your preferred time slot!) and you and I will be putting our heads together in ongoing monthly strategy calls after that.

Looking forward to working with you!

XXX

**Created by:**  Confident OBM

**Department:** XXX

**Date:** XXX

**Revised:** XXX

**Revised by:** XXX