

Follow-Up Email Templates

FILE by FIFO — Post-Meeting Communication

Copy, customize, and send after every sales meeting

Template 1: Great Meeting — They're Interested

Use when: Meeting went well, they want a quote or are ready to move forward

Subject: File by FIFO — Your Quote + Next Steps

Hi [Name],

Thank you for meeting with me today to discuss File by FIFO. It was great to learn about [Company Name] and understand your HR challenges.

As discussed, here's your quote:

[Company Name] — [X] Employees - Annual Subscription: R[X] - One-Time Setup Fee: R[X] - **Total Year 1: R[X]**

This includes: - 10-phase guided warning wizard - 11 South African language scripts - Unlimited warnings and employee records - Setup assistance and training - Ongoing email support

Next Steps: 1. Review the attached one-pager and pricing sheet 2. Let me know if you have any questions 3. When ready, I'll send the order form to get started

I'm available for a follow-up call if you'd like to discuss anything further or show the system to other stakeholders.

Looking forward to helping [Company Name] protect your business.

Best regards, [Your Name] [Your Phone]

Attachments: one-pager.pdf, pricing-sheet.pdf

Template 2: Thanks for Your Time — Need to Think

Use when: They're interested but need time to consider or get internal approval

Subject: Thanks for Your Time — File by FIFO

Hi [Name],

Thank you for taking the time to meet with me today. I enjoyed learning about [Company Name] and your approach to managing your team.

I understand you need some time to [discuss internally / consider your options / get approval]. That's completely reasonable.

In the meantime, I've attached: - Our one-pager (quick overview for sharing with colleagues) - The pricing sheet (detailed breakdown)

Key points to remember: - Starting from R[X]/month for your [X] employees - One prevented CCMA case pays for 5+ years of File - Setup assistance included — we make it easy

Would it be helpful if I scheduled a brief demo for [decision maker name / your team / the HR manager]? I'm happy to walk through the system with anyone who'd like to see it.

I'll follow up next [day] to see if you have any questions.

Best regards, [Your Name] [Your Phone]

Attachments: one-pager.pdf, pricing-sheet.pdf

Template 3: As Discussed — Ready to Proceed

Use when: They said yes in the meeting, confirming and formalizing

Subject: Let's Get Started — File by FIFO

Hi [Name],

Great news! I'm excited to welcome [Company Name] to File by FIFO.

As discussed, here's what happens next:

Step 1: Complete the Forms Please fill in and return: - Order Form (attached) — confirms your subscription - Onboarding Form (attached) — tells us how to set up your account

Step 2: Payment Once we receive your order form, we'll send an invoice for: - Annual Subscription: R[X] - Setup Fee: R[X] - **Total: R[X]**

Step 3: Setup Call After payment, we'll schedule a setup call to: - Configure your account - Import your employee data - Train you and your managers

Timeline: Most clients are live within 3-5 business days of payment.

Let me know if you have any questions. Simply reply to this email with your completed forms, and we'll take it from there.

Welcome aboard!

Best regards, [Your Name] [Your Phone]

Attachments: order-form.pdf, onboarding-form.pdf

Template 4: Welcome Aboard — Payment Received

Use when: They've paid, confirming and setting expectations

Subject: Welcome to File by FIFO — Let's Get You Set Up

Hi [Name],

Thank you! Your payment has been received, and your File by FIFO account is being prepared.

What happens now:

1. **Account Setup (Today/Tomorrow)** We're creating your account and configuring your company branding.
2. **Setup Call (Scheduled for [Date/Time])** We'll walk through the system together, import your data, and answer any questions.
3. **Go Live (Target: [Date])** Your managers will be ready to use File.

Before our setup call, please: - [] Send your company logo (if not already sent) - [] Complete the onboarding form (if not already done) - [] Prepare your employee list (CSV or we'll enter manually)

Your Account Details: - URL: <https://file.fifo.systems> - Admin Login: [email address] - (Temporary password will be sent separately)

If you have any questions before our call, just reply to this email.

Looking forward to helping [Company Name] protect your business!

Best regards, [Your Name] [Your Phone]

Template 5: Follow-Up — No Response

Use when: You sent a quote/info but haven't heard back (wait 3-5 business days)

Subject: Quick Follow-Up — File by FIFO

Hi [Name],

I wanted to follow up on our conversation from [date] about File by FIFO.

I know things get busy, so I'll keep this brief:

- Did you have a chance to review the information I sent?
- Do you have any questions I can help answer?
- Would it be helpful to schedule a quick call?

If now isn't the right time, no problem — just let me know and I'll check back in a few months.

If you're ready to move forward, I'm happy to send the order form whenever works for you.

Best regards, [Your Name] [Your Phone]

P.S. Remember, one prevented CCMA case pays for over 5 years of File. It's peace of mind you can't afford not to have.

Template 6: Price Objection Follow-Up

Use when: They said it's too expensive in the meeting

Subject: The Real Cost — A Quick Thought

Hi [Name],

Thanks again for our meeting. I've been thinking about your concern about the investment.

Here's a different way to look at it:

The Math: - File for [Company Name]: R[X]/year - Average CCMA case (if lost): R180,000+ - Break-even: One case every [X] years

The Question: How confident are you that every manager in your business will handle every disciplinary situation correctly for the next [X] years?

File isn't an expense — it's insurance. And unlike insurance, it actively helps you avoid claims by ensuring proper process every time.

I'd be happy to discuss this further or explore options that might work better for your budget. Would a quick call help?

Best regards, [Your Name] [Your Phone]

Email Tips

Before Sending

- ☐ Replace all [brackets] with actual information
- ☐ Attach relevant documents
- ☐ Proofread for typos
- ☐ Check recipient email address

Best Practices

- Send same day or next morning after meeting
- Keep follow-ups short (2-3 paragraphs max)
- Always include a clear next step
- Be helpful, not pushy
- Use their name and company name

Follow-Up Schedule

After Meeting	Action
Same day	Send main follow-up email
3-5 days	First follow-up if no response
2 weeks	Second follow-up
1 month	Final follow-up or "keep in touch"
