next8n

EMAIL TEMPLATES

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Author: Mirza Iqbal

Contact: mirza.iqbal@next8n.com

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1. Sales & Discovery

Initial Response to Inquiry

```
Subject: RE: [Their Subject] / Thanks for reaching out!

Hi [First Name],

Thanks for reaching out about [what they mentioned]!

I help [industry/type] companies automate [specific process],
and it sounds like there might be a good fit here.

I'd love to learn more about what you're looking to solve.
Do you have 20-30 minutes this week for a quick discovery call?

Here's my calendar: [Calendly Link]
Or let me know what times work for you.

Looking forward to chatting!

[Your Name]
[Your Title]
[Company]
```

Discovery Call Confirmation

```
Subject: Confirmed: Discovery Call - [Date] at [Time]

Hi [First Name],

Great, we're confirmed for [Day, Date] at [Time] [Timezone]!

JOIN LINK: [Zoom/Meet Link]

What we'll cover:
* Your current workflow challenges
* What you're hoping to achieve
* Whether our solutions might be a good fit

Feel free to bring anyone else who should be part of the conversation.

If anything comes up, just let me know.

Talk soon!

[Your Name]
```

Post-Discovery Follow-Up

```
Subject: Great chatting - Next steps

Hi [First Name],

Thanks for the great conversation today!

QUICK RECAP:
* [Main pain point they mentioned]
* [What they're looking to achieve]
* [Key requirement or constraint]

NEXT STEPS:
I'm putting together a proposal with a few options that
address [their need]. You'll have it by [date].

In the meantime, if you think of anything else, just reply!

Talk soon,

[Your Name]
```

2. Proposal & Closing

Proposal Delivery

```
Subject: Your Automation Proposal - [Project Name]

Hi [First Name],

As promised, here's your proposal for [project name].

 PROPOSAL: [Link to document or attached]

WHAT'S INCLUDED:
* [Key deliverable 1]
* [Key deliverable 2]
* [Key deliverable 3]
* Full documentation and training
* [X] days post-launch support

INVESTMENT: $[X,XXX]

I've designed this based on our conversation about [their need].
The approach focuses on [key benefit].

NEXT STEP:
Let's schedule 30 minutes to walk through the proposal together.
Here's my calendar: [Link]

Or if you have questions, just reply!

[Your Name]
```

Proposal Follow-Up (No Response)

```
Subject: Following up - [Project Name] Proposal

Hi [First Name],

Just checking in on the proposal I sent over on [date].

Did you have a chance to review it? I'm happy to:
* Walk through it together on a call
* Answer any questions
* Adjust the scope if needed

What works best for you?

[Your Name]

P.S. Our calendar fills up quickly, so if timing is important,
let me know and we can secure your spot.
```

Ready to Sign

```
Subject: Ready to get started - Agreement attached

Hi [First Name],

Exciting! I'm attaching the service agreement for [project name].

 AGREEMENT: [Link to DocuSign/PandaDoc]

QUICK OVERVIEW:
* Project: [Brief description]
* Investment: $[X,XXX]
* Timeline: [Overview]
* Deposit: $[X,XXX] to begin

TO PROCEED:
1. Review and sign the agreement
2. We'll send the deposit invoice
3. Once received, we'll schedule kickoff!

Questions? Just reply or give me a call.

Looking forward to working together!

[Your Name]
```

3. Project Kickoff

Pre-Kickoff Preparation

```
Subject: Kickoff Prep - [Project Name] - [Date]

Hi [First Name],

Excited for our kickoff call on [Date] at [Time]!

JOIN: [Zoom/Meet Link]
Duration: ~60 minutes

TO PREPARE, PLEASE HAVE READY:

 Sample data/examples
    - [Specific examples needed]
    - Anonymize if needed

 Tool access information
    - [List of tools we'll connect]

 Right people on the call
    - Decision maker
    - Technical contact (if different)

 Your n8n account (I'll help set up if needed)

AGENDA:
1. Review scope & timeline (10 min)
2. Set up n8n environment (20 min)
3. Configure first integrations (20 min)
4. Agree on communication & next steps (10 min)

See you soon!

[Your Name]
```

Post-Kickoff Summary

```
Subject: Kickoff Complete - [Project Name] - Next Steps

Hi [First Name],

Great kickoff today! Here's a summary of where we are:

 COMPLETED:
* n8n environment set up
* [Your Name] has team access
* [Integration 1] connected
* [Integration 2] connected

 YOU NEED TO PROVIDE:
 [Remaining sample data]
 [Any pending credentials]
 [Other items]

 WE'LL DO:
 Begin building [Workflow 1]
 Send weekly progress updates
 Reach out if questions arise

NEXT CHECK-IN:
[Date/Time] or [how you'll communicate]

COMMUNICATION:
* Weekly updates: [Loom/Email]
* Questions: [Slack/Email]
* Urgent: [Method]

Questions? Just reply!

[Your Name]
```

4. During Development

Weekly Update

```
Subject: Weekly Update - [Project Name] - Week [X]

Hi [First Name],

Here's your weekly update!

 COMPLETED THIS WEEK:
* [Accomplishment 1]
* [Accomplishment 2]
* [Accomplishment 3]

 IN PROGRESS:
* [Current work] - [X]% complete

 NEXT WEEK:
* [Planned work 1]
* [Planned work 2]

 QUESTIONS/NEEDS:
* [If anything needed from them]

 BLOCKERS:
* [Any blockers, or "None!"]

We're on track for [milestone/completion date].

VIDEO: [Loom link if applicable]

Questions? Reply anytime.

[Your Name]
```

Requesting Information/Decision

```
Subject: Quick question - [Project Name]

Hi [First Name],

Quick question as I'm building [specific part]:

[Clear question with context]

OPTIONS:
A) [Option A description]
B) [Option B description]

My recommendation: [Your suggestion and why]

Can you confirm which direction to go?

Thanks!

[Your Name]
```

Requesting Information/Decision

Scope Change Request

```
Subject: Scope Discussion - [New Request]

Hi [First Name],

Thanks for sharing your idea about [new request].

I've reviewed it, and here's my assessment:

THIS REQUEST:
[Clear description of what they asked for]

SCOPE STATUS:
This is outside our current project scope, which includes:
* [Original deliverable 1]
* [Original deliverable 2]

OPTIONS:

1. ADD TO CURRENT PROJECT
   Additional investment: $[X,XXX]
   Timeline impact: [X days/weeks]

2. PHASE 2 PROJECT
   After current project completes
   Separate quote

3. FOCUS ON CURRENT SCOPE
   Add to backlog for future

My recommendation: [Your suggestion]

Let me know how you'd like to proceed!

[Your Name]
```

5. Testing & Feedback

Ready for Client Testing

```
Subject: Ready for Testing! - [Project Name]

Hi [First Name],

Great news - the workflow is ready for you to test!

TESTING INTERFACE: [Link or instructions]

DEMO VIDEO: [Loom walkthrough]

HOW TO TEST:
1. [Step 1]
2. [Step 2]
3. [Step 3]

WHAT TO LOOK FOR:
* Does the output match your expectations?
* Is the format/tone appropriate?
* Any edge cases I should handle?

FEEDBACK:
Please share feedback by [date] using:
* Reply to this email
* Record a Loom
* [Feedback form link]

This is the testing phase - finding issues now is expected and helpful!

[Your Name]
```

Requesting Feedback

```
Subject: Feedback Request - [Project Name]

Hi [First Name],

Checking in on the testing - have you had a chance to try
the workflow yet?

I'd love to get your feedback so we can make any needed
adjustments before final delivery.

Quick questions:
1. What's working well?
2. What needs adjustment?
3. Any edge cases to consider?

Please share by [date] so we stay on track for [delivery date].

Thanks!

[Your Name]
```

6. Handover & Delivery

Scheduling Handover

```
Subject: Handover Call - [Project Name]

Hi [First Name],

Your workflow is ready for handover!

Let's schedule the handover call where I'll:
* Walk you through the live system
* Show you how to monitor
* Go live together
* Answer any questions

Please pick a time: [Calendly Link]

PLEASE HAVE READY:
* Access to your n8n
* Production credentials (if not already configured)
* Anyone else who should join

Duration: 45-60 minutes

Looking forward to it!

[Your Name]
```

Post-Handover Complete

```
Subject: Handover Complete - [Project Name]

Hi [First Name],

Congratulations - your workflow is live!

CALL RECORDING: [Link]

 DOCUMENTATION:
* Walkthrough Video: [Link]
* Technical Docs: [Link]
* FAQ: [Link]

 BACKUPS:
* Workflow Export: [Link]

SUPPORT PERIOD:
I'll be monitoring closely for the next [X] days.
Reach out anytime if something seems off.

 WHAT'S NEXT:
1. I'll check in with you on [date]
2. Let me know if you notice anything unexpected
3. Support period ends [date]

Thank you for trusting me with this project!

[Your Name]
```

7. Billing & Admin

Invoice Sent

```
Subject: Invoice #[XXXX] - [Project/Description]

Hi [First Name],

Please find attached Invoice #[XXXX] for $[X,XXX].

PROJECT: [Project Name]
AMOUNT: $[X,XXX]
DUE: [Date]

PAYMENT OPTIONS:
* Bank: [Details]
* Card: [Payment Link]
* [Other]: [Details]

If you have any questions about this invoice, just reply!

Thank you,

[Your Name]
```

Payment Received

```
Subject: Payment Received - Thank You!

Hi [First Name],

This confirms receipt of your payment of $[X,XXX]
for Invoice #[XXXX].

Thank you!

[Any next steps if applicable]

Best,

[Your Name]
```

8. Relationship Management

Project Complete - Thank You

```
Subject: Thank You - [Project Name]

Hi [First Name],

Now that [Project Name] is complete, I wanted to say
thank you for the opportunity to work with you.

It's been a pleasure building [what we built] and seeing
[outcome or impact].

A FEW REQUESTS:

1. TESTIMONIAL (Optional)
   If you're happy with the results, I'd love a brief
   testimonial for my portfolio. A few sentences about
   your experience would mean a lot.

2. REFERRALS
   If you know anyone who could benefit from automation,
   I'd appreciate an introduction.

3. FUTURE WORK
   I'm here if you need additional automation help.
   Just reach out!

Thanks again, and I hope to work together again soon!

[Your Name]
```

Quarterly Check-In (Past Clients)

```
Subject: Checking In - How are the automations running?

Hi [First Name],

It's been a few months since we wrapped up [Project Name],
and I wanted to check in.

How's everything running? Any issues or new needs?

I'm also working on some new [relevant capability] that
might be useful for you.

Let me know if you'd like to catch up!

Best,

[Your Name]
```

9. Offboarding

Retainer Ending

```
Subject: Retainer Transition - [Client Name]

Hi [First Name],

As discussed, your retainer will be ending on [Date].

FINAL STEPS:

1. DOCUMENTATION UPDATE
   I'll update all documentation before [date]

2. FINAL HANDOVER
   Let's schedule a brief call to wrap up
   [Calendly Link]

3. DELIVERABLES
   You'll receive:
   * Updated workflow exports
   * Current documentation
   * Final monthly report

4. FINAL INVOICE
   Will be sent on [date] for the remaining period

AFTER [DATE]:
* I'll remove my access to your systems
* Future support available as new projects

It's been great working with you. Let me know if you
have any questions about the transition.

[Your Name]
```

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