keap

Welcome Email Templates

6 ready-made email nurture series templates
for new subscribers and new customers



Engage and convert subscribers with powerful welcome emails

Welcome emails typically have higher open and click-through rates than standard marketing emails. They provide a powerful opportunity to:

- Help solve challenges and build trust in your expertise
- Educate subscribers about your business
- Build a relationship with your ideal customers
- Encourage leads along a path to becoming a client

The email templates in this guide have been created for some of the most common use cases for small businesses. However, it's important that you customize them to match your brand, content, and offers. Remember, these emails are important to building an ongoing relationship with your ideal customer, so make sure they sound like they're coming from you.

In general, welcome emails should do some or all of the following:

- Have an upbeat, welcoming, congratulatory tone
- Set expectations about what's next
- Alleviate concerns the reader might have
- Resell the value of the product, the brand, the community
- Share valuable, popular content

Let's dive into the templates! There are 6 to choose from in this guide:

1. Lead magnet delivery email sequence

2. Newsletter subscription email templates

3. Free trial welcome series templates

4. New client onboarding welcome templates

5. New customer welcome email templates

6. Loyalty program welcome sequence templates

Lead magnet delivery email sequence

This email sequence is designed to deliver a lead magnet, begin to establish you as an expert in your field, and outline what your subscriber can expect next. It will also work to build the relationship with the subscriber by asking about their pain points and sending them resources tailored to their needs.

There are 4 emails in the series. The first email should be delivered as soon as the prospect signs up for the lead magnet, and the subsequent emails can go out with 1 to 2 days between each email.

The follow-up emails are especially important if the prospect doesn't download the lead magnet in the first email. The follow-up emails remind them of the value of the resource, encourage them to download it, and offer even more value in later emails.

01

This first email delivers the lead magnet, reiterates its value, and sets the expectation that you'll contact them again in the future.

TO

CC

Here's the **[lead magnet name]** you requested!

Hi **[first name]**,

We're so glad you requested our **[lead magnet name]**. It's a great resource to get you started **[doing/getting what they desire]**, even if you **[common hurdle]**.

Click here to download it now.

Inside you'll find:
- **[Item A]**
- **[Item B]**
- **[Item C]**
- And much more!

[Include a testimonial from a lead/customer who found value in this resource.]

Don't miss out on **[benefit offered by the resource]**.

Download the [guide, ebook, cheat sheet, etc., linked] now.

[company signature]

P.S. Be on the lookout for more great resources about **[topic of lead magnet or related topic]** in your inbox over the next few days.

02

This email provides another resource related to the pain point and desired outcome that your lead magnet and your business can help them with. By including a brief customer story, it confirms that you understand their pain and have helped people like them, which adds valuable social proof and credibility.

TO

CC

From **[pain]** to **[desired result]**

Hi **[first name]**,

We hope you're enjoying **[lead magnet name, linked]** and thought you might enjoy this popular resource as well:

[name of resource that complements the lead magnet they requested, linked].

We created it to help people struggling with **[pain point]** to **[desired result].**

Before **[solution you provide]**, **[client name]** was **[describe their problem/situation]**. After we helped them [**what you do]**, they **[transformation or result]**.

To discuss how we can help you achieve **[desired result], [make an appointment, reply to this email, watch a demo, etc.]**

[company signature]

03

The goal of this email is to understand the pain points and desires of the lead. Capture their response by asking for a reply and/or tracking their clicks to the linked resources. Then feed that information into your marketing automation software so you can provide tailored follow-ups containing relevant resources to help them move forward.

TO

CC

Help us help you **[first name]**

Hi **[first name]**,

What is the biggest challenge you're facing right now regarding **[topic/problem you help them with]**?

Reply to this email to let us know.

You can also check out these additional resources that are popular with our clients:

- **[Option A]**
- **[Option B]**
- **[Option C]**
- **[Everything/default option]**

We're here to help. Just let us know what you need!

[company signature]

P.S. If you haven't yet downloaded **[name of lead magnet, linked]**, do that now. You can also check out **[popular resource, linked]** to learn more about **[topic]**.

04

Now that you have some information about the lead's interests, it's possible to provide a resource that can help them. It's also a great time to introduce another customer success story. Since this is the last email in the series, we end with a P.S. that incites some gentle-yet-powerful urgency to take action.

TO

CC

Let's get you **[desire/need based on input from email #3]**

Hi **[first name]**,

You mentioned that you're interested in **[desire/need based on input from email #3]**. You've come to the right place for help! Check out this great resource: **[title/link]**

Many of our clients are looking for help with **[x]**, too. **[Share a success story of a customer, outlining the pain points they faced and how you helped them succeed. Include a written or video testimonial.]**

We've helped **[x people]** do **[x]** over the past **[x years]**, and we'd love to help you, too!

To get started, **[make an appointment, reply to this email, watch a demo, etc.]**

[company signature]

P.S. What will life be like a year from now if you don't take action now to change things? Even baby steps are better than nothing. If you're feeling uncertain, just reply to this email and tell us what you need to get unstuck. If we could wave a magic wand and give you what you need, what would it be?

Newsletter subscription email templates

This series is for new subscribers to your newsletter, blog, or mailing list. You'll share some valuable content right away and let them know what to expect going forward.

Deliver the first email as soon as they subscribe, then send the follow-up emails every 1-2 days afterwards. They'll also receive your other emails whenever you send them out to your entire list.

01

This email is sent immediately after subscribing. The goals are to welcome the lead, reiterate the benefits of subscribing, and share what they can expect going forward.

TO

CC

Thanks for signing up!

Hi **[first name]**,

Welcome!

Thank you for subscribing to the **[company name] [weekly/monthly]** newsletter! Going forward, we'll share the latest **[news/content/ resources/articles/tips]** about **[topics]**, as well as sneak peeks at our products and special discounts.

Over the next few days, we'll share some of our customers' all-time favorite resources to jumpstart your learning.

In the meantime, we've curated a few resources we think you'll love: **[list titles with images and links]**

[company signature]

02

The goals of this email are to position you as a trusted thought leader and begin to outline how you can help them. Provide a resource that ties closely to your company's benefits to make that connection.

TO

CC

A special free resource for you

Hi **[first name]**,

Welcome!

We've gotten a ton of positive feedback about **[resource name, linked]** so we wanted to share it with you!

Over the past **[x]** years, we've helped **[x]** customers **[do x/achieve x]**.

If you would like to achieve **[desired outcome], [make an appointment, reply to this email, watch a demo, etc.]**

[company signature]

03

Similar to email #2, this email will continue to highlight your expertise and how you can help them. Select one of your most popular resources and include a client story to provide important social proof.

TO

CC

They did it, and so can you

Hi **[first name]**,

One of our most popular **[articles, videos, etc.]** is **[resource name, linked]**.

[Topic] is at the heart of what we do at **[company name]**. Here's just one example of how we helped a client **[do x]**:

[Insert customer story]

Will your success story be next? We hope so!

To get started, **[make an appointment, reply to this email, watch a demo, etc.]**

[company signature]

Free trial welcome series templates

When a lead signs up for a trial of your product or service, use this email welcome series to help them get value from the trial and see the benefits of purchasing the full product.

01

Welcome your free trial subscriber, remind them of the value of what they're getting to test drive for free, and let them know how to get started and where they can go for help if needed.

TO

CC

Welcome to your free trial of **[product name]**

Hi **[first name]**,

Welcome to **[company or product name]**! We can't wait to help you **[main benefit you offer]** so that you can:

- **[Benefit A]**
- **[Benefit B]**
- **[Benefit C]**

We've helped **[x number]** of **[type of person you serve]** to **[benefit they want]** with our **[product/service]**.

To get started, simply **[next step instructions, with link]**.

If you run into any challenges, reach out to us at **[support info]**.

[company signature]

P.S. Your free trial lasts for **[length of time]**, so be sure to take advantage of it right away. You can upgrade at any time by **[upgrade process]**. Questions? Call us at **[sales phone number]**.

02

Encourage your subscriber to take advantage of the free trial by reminding them of the pain it solves and how easy it is to get a solution through their free trial. Share resources that will help them get the most value out of their trial.

TO

CC

Use your trial to **[benefit]**

Hi **[first name]**,

We've all had that awful feeling of **[painful emotion]** upon realizing that **[weakness/shortcoming]**... which led to **[undesirable result]**.

But that's about to change, because now you have **[free trial product]**, which will help you **[benefit]** so you can **[desirable result]**.

If you haven't already, start right now by **[instructions]**.

You can also take advantage of these additional resources to help you along the way:

- [Resource A, linked]
- [Resource B, linked]
- [Resource C, linked]

Reach out to us if you have questions. We're here to help!

[company signature]

03

Highlight the value of your product with success stories or best practices and encourage them to take next steps to achieve their own success story.

TO

CC

This success story could be yours **[first name]**

Hi **[first name]**,

It's hard to get **[desired result]** when **[obstacle]**.

No one knows that better than **[client name]**, who **[problem situation before you helped them. Describe their pain, their desire, what was standing in their way of success]**.

Then, they **[action they took with you or your product]**, and now:

- **[Result A]**
- **[Result B]**
- **[Result C]**

We love hearing these success stories... And we hope that yours is next!

[Action they need to take to move forward] now to begin your journey towards **[desired result]**.

[company signature]

04

Send this email shortly before their free trial ends with a special offer to upgrade to the paid product. The urgency of the trial ending plus a discount is a powerful combination. Throw in some client testimonials if you have them.

TO

CC

Special offer only for free trial participants

Hi **[first name],**

Your free trial of **[program name]** expires in **[x days]**, but there's good news: You can upgrade to **[name of paid program]** for only **[sale price/ offer]**.

[CTA button, linked:] Get special offer

Now's the time to **[key benefit or action]** like these clients:

[Insert 2 or 3 short testimonials]

Act now, because this special offer expires on **[date]**. You'll be glad you did!

[CTA button, linked:] Get discount

[company signature]

05

This post-trial email can be sent if the free trial subscriber didn't purchase the paid product. Ask for feedback about their experience to help you improve and also to address their concerns, which could lead to purchase.

TO

CC

Did we miss the mark **[first name]**?

Hi **[first name]**,

I work with **[company name]** and I noticed that you didn't sign up for the full version of **[program name]**.

Did we miss the mark in some way?

Please reply to let me know how we could have served you better.

If you're still interested and the timing just wasn't right, reply and let me know what time would work better for you, as I may be able to extend the special offer if I hear from you soon.

[salesperson signature]

New client onboarding welcome templates

This series is especially helpful for service-based businesses and can be used to set expectations, communicate what next steps to take, and provide links to key documents. It helps improve the client experience and boost retention.

Generally, it's a good idea to send these emails one day apart starting from the moment the client signs up with you. However, you may want to customize the cadence to fit your business and client experience.

01

Welcome them, thank them for their purchase, and reinforce that they made a smart buying decision. Get them excited to get started, encourage them to take the next step, and set expectations for what comes next.

TO

CC

Welcome to **[program name] [first name]**!



Hi **[first name]**,

Welcome and congratulations on your decision to sign up for **[product name]**! You're now on your way to **[desired result]**.

Here's what happens next:
[List out next steps / what to expect]

Let's get started! Take a few minutes right now to **[next step, linked if applicable]**.

We'll follow up with you regularly over the next few **[days/weeks]** with helpful reminders to keep you on track and to share valuable best practices. In the meantime, here are some resources to get you started successfully:
[List resources, linked]

If you have any questions or get stuck, reach out to us right away at:
[support contact info]

Thank you once again for placing your trust in us. Here's to your success!

[company signature]

P.S. For a little extra inspiration, here are some of the results others have gotten from this program. We can't wait to add your success story to this list!

[add in a few testimonials with client results]

02

Follow up on next steps, address common questions posed at this stage, and provide links to additional resources if appropriate. If you have a way of tracking what steps they've taken so far, make the text dynamic to where they're at in the process. Remind them to ask for help if they need it.

TO

CC

Following up on your progress

Hi **[first name]**,

How are things going with **[program name or their goal]**?

It looks like your next step is to **[dynamic text for next step]**.

Is there anything holding you back from moving forward? If so, remember that you can reach out to us at **[support contact info]** and we'll do our best to help you.

Some common questions and concerns that clients may have at this stage are:
[List questions, and link the text to where they can find the answers. Or, if the answers are short, include them here in the email.]

You may also find these resources helpful:
[List resources with links]

[company signature]

03

This email drives the new customer to a quiz or assessment. Depending on your onboarding process, you may want to move this email up in the series or combine it with the first email. If you have a quiz, just use “quiz” wherever it says “assessment” in the template.

If you have a tool like Keap, you can use a web form to capture their answers and tag them in your system so that you can do customized follow-up based on their responses.

TO

CC

[Program name] assessment

Hi **[first name],**

To help you get the most out of **[program or service]**, take this quick **[name of assessment]** assessment.

[Button linking to assessment] Take assessment

Your answers will help us optimize the program to your needs. It only takes a few minutes, so get started now. **[link to assessment]**

[support signature]

04

This email encourages new clients to engage with your community wherever they hang out online and to follow you on social media. If you have a customer referral program, this is a good place to mention it. You can also remind them of helpful resources and support options.

TO

CC

Be a part of our amazing community

Hi **[first name]**,

One of the benefits you get as a member of **[program name]** is access to our amazing community of **[type of people]**. If you haven't already, join the powerful discussions happening online in **[our private Facebook group, our private community forum, etc.]**

[Button, linked:] Join community

Our community needs your voice, so don't hesitate to join the conversation and share your experiences!

Also, be sure to follow us on **[social media names, linked]** and connect with the community there.

We're so excited that you're now a part of our community of powerful **[type of people]** who are **[desired result]**. If you know others who could benefit from this program, you can earn **[referral bonus]** when you refer them to us. Together, we can change even more lives for the better!

[company signature]

P.S. As always, you can access helpful program resources and information here: **[link to resources or dashboard]**

New customer welcome email templates

This series is geared towards product-based businesses to engage a customer after their first purchase. Use it for upsells, referral and review requests, and building brand loyalty.

Send this series right after their purchase, then move them into your regular mailing list for ongoing notification of sales and product announcements.

01

Thank them for their purchase and let them know it's being processed (or is already delivered, if it's an info product).

TO

CC

Thank you! We're processing your order.

Hi **[first name],**

Thank you for your purchase! We're processing your order now. Here are the details:
[insert dynamic fields with product name, image, price, delivery timeline if available]

[Or, if it's an info product, use this copy instead:]

Thank you for your purchase of **[product name]**! You can access it here: **[link to download or access content online]**

Based on your purchase, you may also find these products of interest: **[list upsell products]**

Once you've had a chance to try it out, share your experience in a review **[link to review site]**.

Questions about your order can be directed to **[support contact info]**.

Thank you for being a valued customer. We applaud your choice to **[benefit of the product to the customer, the environment, the community, etc.]**

[company signature]

02

If you have a product that makes a difference in the world, use this email to applaud the customer's participation in that movement and encourage them to spread the word. This will help build brand loyalty and reinforce the customer's decision to buy.

TO

CC

You're making a difference **[first name]**

Hi **[first name]**,

With your recent purchase of **[product name]**, you're supporting the movement to **[name/describe cause]**. Thank you!

The world needs more people like you. Together, we can make an even bigger impact. That's why your help is needed to spread the word about **[product]** and how it **[benefit to mankind]**. And, to reward you for doing so, we're offering **[referral bonus]** when you **[referral action needed]**.

Together, we're changing lives. Thank you for being part of the movement!

[company signature]

03

Use this email to encourage buyers to share their experience—publicly if they're happy, or with customer service if they're not happy. Remind them of your referral bonus and upsell opportunities.

Note: Avoid using the word "feedback" in the subject line as this tends to trigger an assumption that you want them to fill out a survey, and most people don't want to be bothered with surveys. Asking for their opinion is more likely to get a response.

TO

CC

How do you like **[product name]?**

Hi **[first name]**,

How are you enjoying **[product name]** so far?

If you have any problems or concerns, contact our Customer Service team at **[support contact info]** so we can do our best to make things right.

If you're loving it, please take a moment to leave us a review so that others can benefit from your experience. **[link to review site]**

And don't forget, you can get **[referral bonus]** when you **[referral action]**.

Plus, take a look at these other products that may interest you:
[upsell product info]

As always, it's a joy serving you!

[company signature]

Loyalty program welcome sequence templates

This series of emails is designed to outline how your loyalty program works, request more information about the loyalty member, and provide an offer to get started.

01

Welcome them to the program and outline how it works.

TO

CC

Welcome to **[Rewards Program Name]**!

Hi **[first name]**,

Thanks for joining **[Rewards Program Name]!** We can't wait to reward you for your **[purchases/visits].**

Here's how the program works:

- Earn **[x]** points per **[dollar spent/visit].** Simply **[do x]** to earn points.
- Receive **[x reward]** when you've reached **[x points or x visits]**
- **[Outline additional benefits like a birthday reward or special offers]**

Start earning points today! **[link to your website]**

02

Ask the customer to provide more information about themselves—information that will help you serve and sell to them more effectively.

TO

CC

Customize your rewards experience

Hi **[first name],**

Make the most of your membership in our rewards program by telling us more about yourself **[to earn x bonus points/so we can personalize your experience]**.

[Update your profile here/reply to this email with x information.]

Keep earning [x] points per **[dollar spent/visit] by [doing x]**.

We can't wait to reward you!

03

Provide a special offer that rewards them for being a loyalty member and upsells them into another product—a win-win for you and the customer.

TO

CC

Here's an exclusive offer for you!

Hi **[first name]**,

As a special bonus for joining our rewards program, we're giving you **[special offer]**. Take advantage of this by **[date]**.*

[Include redemption instructions]

Redeem your offer now! **[link]**

[*Include any offer details and legal copy.]

04

If they didn't purchase after the last email, send this one to remind them of their special offer.

TO

CC

Don't let your exclusive offer expire

Hi **[first name]**,

Don't miss out on your special offer for **[x]**, valid through **[date]**.*

[Expand on benefits of purchasing your product/service, including customer testimonials if possible.]

[Include redemption instructions]

Redeem your offer now! **[link]**

Keep earning **[x]** points per **[dollar spent/visit]** by **[doing x]**. We can't wait to reward you!

[*Include any offer details and legal copy.]

Conclusion

A good nurture sequence:

- Provides value to your subscribers
- Demonstrates that you understand their problems and desires
- Shows that you have what they need to reach their goals
- The result is credibility, trust, and a stronger relationship between you and your subscribers.

As you customize these templates to your own business, put yourself in your subscribers' shoes so you can deliver what they need, when they need it. Meeting them where they're at will maximize your open rates and your relationship with them.

Ready to put these templates to work in your business?
Start a free trial of Keap to choose from beautiful free email template designs and easily automate your welcome series.

Extra Resources

Play Blueprint: Nurture Sequence
Learn how to create a powerful email nurture sequence using Keap, and get step-by-step instructions that you can implement in just 30-45 minutes.

Keap Sales & Marketing Automation Software
Quickly and easily set up automated email sequences... and so much more! Try it free for 14 days (no credit card required).

Business Success Blog
Stay up to date on small business marketing trends, tactics, and strategies on the Keap blog.