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First Contact Email to a New Referral Source

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USE FOR:
PRIVATE AND THIRD
SECTOR

HOW TO USE

Write to professionals whose clients plausibly need your firm's work, with a reason specific to them. Name a mutual contact only if they have agreed. This template is for professional contacts: paragraph 8.9 of the SRA Code bars unsolicited approaches to members of the public.

Who you may email. Emailing a company or LLP needs no consent, but you must identify yourself and offer an opt-out. Sole traders and some partnerships count as individuals: email them only with consent or where the soft opt-in applies. If you cannot tell which applies, treat the contact as an individual (ICO business-to-business marketing guidance).

SUBJECT LINE: REFERENCE SOMETHING REAL TO THEM

Never use: Introduction | Reaching out | Connecting | Partnership opportunity

- o Your talk at [event] on [topic]
- o [Mutual contact] suggested I get in touch
- o [Development] and your [sector] clients
- o A question about your [sector] clients

VERSION A: WARM INTRODUCTION VIA A MUTUAL CONTACT

Dear [First Name],

[Mutual contact] suggested I contact you. I work in [role and area] at [firm], and much of our work is with [client type], which appears close to yours. Would a short conversation be useful?

[Name] | [Firm] | [Phone]

VERSION B: CONTENT OR EVENT CONNECTION

Dear [First Name],

I [read your article / attended your talk] on [topic]. [One specific, truthful observation.] I work in [role and area] at [firm]. Would a short conversation about our respective work be useful?

[Name] | [Firm] | [Phone]

VERSION C: SECTOR RELEVANCE, NO PRIOR CONNECTION

Dear [First Name],

I work in [role and area] at [firm]. Your published information suggests you work with [client group]. If relevant, would you be open to a brief conversation about the services our organisations provide?

[Name] | [Firm] | [Phone]

IF THERE IS NO REPLY: ONE FOLLOW-UP AFTER 10 WORKING DAYS

Dear [First Name], I am following up on my message of [date]. If this is relevant, would a short conversation be useful? If you would prefer no further messages, please let me know. [Name and firm]

THE RULE

One accurate subject, one clear identity, one relevant request, with the firm's approved privacy and opt-out wording. Stop after any objection.

INSIGHT

Specialise. A first contact that shows you understand their clients' problems beats one that lists everything your firm does.