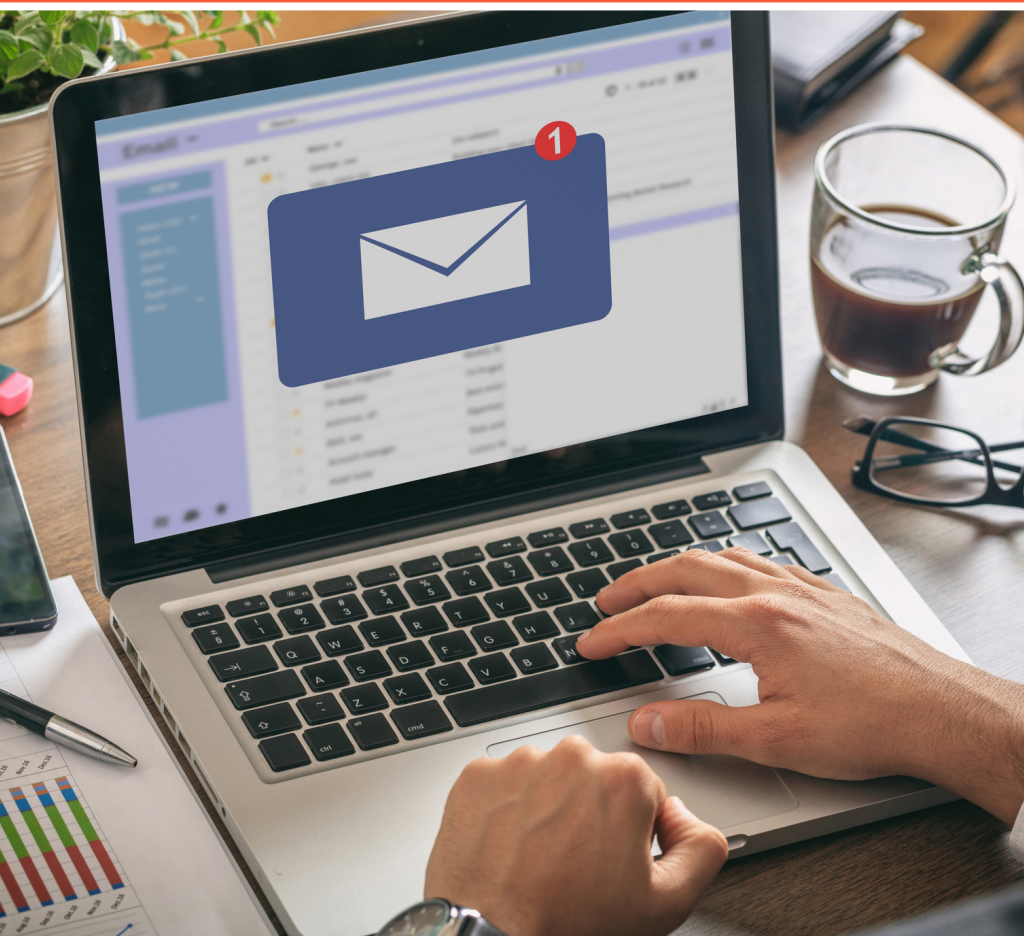


Free Onboard Email Marketing Templates

Rossi Digital Marketing



Getting Started

Before we get started, a few tips about emails.

- Less is more – respect people’s inboxes and don’t spam them with email. It may help some metrics or sales in the short term but it will hurt you in the long run (trust me).
- Provide Value – like the point above, don’t just send emails for the sake of sending emails. If there is no value or “purpose” to the email from the customer point of view then it shouldn’t be sent.
- Keep It Simple – make sure it is clear what the purpose of the email is, simplify your CTA and avoid ambiguous language (e.g. industry jargon, etc.)
- Experiment – these are just templates and there are no real 100% rules to email marketing. Test, experiment, mess around with different strategies to find what works.

With that being said, I hope the email templates below help you out! If you have any questions, feel free to reach out to me by visiting my website at <https://rossidigitalmarketing.com/contact-us>.



Onboarding Email Marketing Templates for New Customers

These emails are an automated sequence that should start once a user purchases your product or starts a free trial. The goal is to get a new user to engage with your product and realize value as quickly as possible.

- **Email #1: Welcome Email**
 - *Cadence:* Immediately after signup
 - *Goal:* Confirm signup, set expectations, and provide easy product resources.
 - *Content:*
 - Thank the user for signing up.
 - Help them get started - resources to help them get to quick value
 - Link to crucial support resources (quick start guide, knowledge base, etc.).
- **Email #2: Value Prop Reminder**
 - *Cadence:* 1-2 days after the Welcome email
 - *Goal:* Remind users why they signed up, drive product usage
 - *Content:*
 - Social Proof
 - Briefly restate 2-3 key benefits/ problems your software solves.
 - Link to resources and additional support
- **Email #3: "Aha Moment" Nudge**
 - *Cadence:* 3-5 days after signup (adjust based on product complexity)
 - *Goal:* Guide users to key action that delivers taste of your products value.
 - *Content:*
 - Contextual onboarding – identify the "aha moment" in your product (profile completion, key feature setup, etc.)
 - Clear instructions on how to achieve this milestone.
- **Email #4: Advanced Feature Spotlights**
 - *Cadence:* 3-7 days after email #3 - can also be usage based depending on product
 - *Goal:* Highlight core features to help drive product usage.
 - *Content:*
 - Briefly describe feature(s) and the problem it/they solve.
 - Include tutorial resources and offer additional support.
- **Email #5: Milestone Celebration/Upgrade Prompt**
 - *Cadence:* Triggered when user hits milestone or end of trial/freemium limits
 - *Goal:* Reaffirm the value they are getting, provide additional resources, and nudge toward paid/upsell if applicable
 - *Content:*
 - Acknowledge their achievement of the milestone.
 - If they're on a free plan, mention features available through upgrading.
 - Provide a time-sensitive discount or offer.

Onboarding Email Marketing Templates for New Customers

Email 1: Welcome Email

Subject Line: Welcome to [Company] – Let's Get Started 🚀

Hi {{ firstname }},

A huge welcome from all of us at [Your Company]!

Over [insert customer amount] use [Your Company] to [insert key benefits] and we're thrilled you've chosen us to be a part of your [insert what your product helps with - e.g., fitness journey, creative workflow, etc.].

We know getting started with a new tool can be a bit overwhelming, so we've put together a few things to make your experience smooth:

- **Example resource 1:** Set up your account: [Link to setup guide]
- **Example resource 2:** Check out our top features: [Link to features page]
- **Example resource 3:** Need help? We're here for you! [Support contact info, FAQ]

Over the next week we will be sending you some additional resources to help you get started (and learn about some of our cooler features) so keep an eye out in your inbox!

We appreciate you choosing [Your Company] and we're here to support your success every step of the way – please don't hesitate to reach out if you have any questions.

Let's get started!

The [Company Name] Team

[Your Logo]

[Your Company Website]

[Social Icons]

High Level Notes

- The biggest challenge (especially if you are a free trial or freemium) is getting them to see value in your product as quick as possible so give them resources and make it easy.
- Social proof, offering guidance etc. are all good ways to reduce buyer's remorse.
- Language, tone, etc. depend on your brand and industry.

Onboarding Email Marketing Templates for New Customers

Email 2: Reinforce Value Prop

Subject Line: Remember Why You Signed Up... 🤔

Hi {{ firstname }},

[Product Name] provides a simple, easy way to [restate core benefits].

One way we do this is through our [highlight a core feature] which helps [insert social proof] achieve [benefit of using this feature].

Here are some quick resources you might find helpful as you get familiar with [Product Name]:

- Example resource 1: Get started guide
- Example resource 2: Tutorial Video or Videos of Key Features
- Example resource 3: Case Study, News Article, or Customer Highlight

If you need more personalized support or have any questions, please don't hesitate to reach out to us at: [insert way for them to reach out]

Cheers,

The [Company Name] Team

[Your Logo]

[Your Company Website]

[Social Icons]

High Level Notes

- I like the subject line remember why you signed up here because it plays on our desire to be consistent and calls on them to remember why they signed up in the first place.
- Once again, goal is to provide resources and get them to that value point - whatever that is for your product.
- Early on, especially for free trials or freemium versions, I would have a special customer success team that responds as quick as possible so that the customers being onboarded get the best possible support you can offer.
- Social proof can be something like "helps our more than 30,000K customers" or "helps our major customers like XYZ" or even as simple as "helps our small business customers" achieve...

Onboarding Email Marketing Templates for New Customers

Email 3: “Ah Ha Moment” Nudge

Subject Line: 📧 The one step to get the most out of [Product Name]

Hi {{ firstname }},

To really get the most out of [Product Name], our [insert social proof] [describe the core action they need to take to get the most out of your product]. This will help you [describe key benefit of that action].

Here's how you do it:

- [Clear steps or link to instructions]
- [Link to additional resources]

If you run into any issues or need more personalized support, we are here to help [insert way for them to reach out].

Hope you are enjoying!

The [Company Name] Team

[Your Logo]

[Your Company Website]

[Social Icons]

High Level Notes

- While this will depend on your product, the “Ah Ha” moment is where the user realizes tangible value - for Canva it might be creating a design or MailChimp an email etc. Figure out what yours is and tailor this email to that. If your product has more than one, figure out the simplest and easiest one.
- Social proof and core action combo can be as simple as *“To really get the most out of our Product XYZ, our small business customers in the financial space uploaded their key documents which helped them save XXX hours/money etc. per week.”*
- Provide outlets for support or if they run into issues, as noted above it can be wise to have a special customer success team that responds as quick as possible so that the customers being onboarded get the best possible support you can offer.

Onboarding Email Marketing Templates for New Customers

Email 4: Advanced Feature Spotlight

Subject Line: [Product Name] Advanced Feature(s) ✓

Hi {{ firstname }},

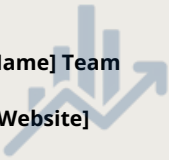
Want to take your [Product Name] experience to the next level? Try out our more advanced [Feature Name] feature. It's perfect for [describe what the feature helps with].

Here's a quick guide to getting started: [Link to guide]

If you need a 1-on-1 walkthrough or more personalized support, just let us know by reaching out: [insert way for them to reach out].

Sincerely,

The [Company Name] Team
[Your Logo]
[Your Company Website]
[Social Icons]



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P.S. if you want to learn more about [include link to resources or upsells etc.]

High Level Notes

- I like sprinkling in the word advanced here (advanced feature or for our more advanced users) as it can be a nice little challenge word to drive engagement.
- Providing resources and guides
- This would normally be an email where I might start adding in a P.S. after the email signature with a CTA I want them to pay attention to. This can sometimes be a creative way to boost click through by almost making it an afterthought.

Onboarding Email Marketing Templates for New Customers

Email 5: Milestone Celebration/ Upgrade Prompt

Subject Line: Congratulations, on [Insert milestone or prompt] 🎉

Hi {{ firstname }},

Congratulations - you just [describe specific milestone]!

To continue getting value from [Product Name], you might want to consider upgrading to our [plan name]. This will give you access to:

- [Feature 1]
- [Feature 2]
- [etc.]

If you're ready to upgrade? [Link to upgrade options]

[Optional: Include a discount code or special offer]

Otherwise, if you need any help or have any questions, as always we're here to help: [insert link to reach out].

Sincerely,

The [Company Name] Team

[Your Logo]

[Your Company Website]

[Social Icons]

High Level Notes

- Milestone can be the same as the upgrade prompt, e.g. "Congratulations, you've used all 5GB of our free tier creating with Product ABC." I like this because it changes the frame on the free trial or freemium limit.
- Providing a discount or special offer here if they are at the end of their free trial/freemium is a great way to boost conversions.
- Reinforcing that you are there to help and providing an outlet for them to seek assistance.

Have questions? Reach out to us to schedule a [free 1-1 marketing consultation](#) today!

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