



New Feature Outreach

Use this template to introduce prospects and customers to new features. Learn more about this template below.

Below is a series of email templates to engage a customer and/or feature champion around a new feature training.

Outreach email:

- Send To: Client admins + [Feature] champion(s)
- CC: Setup lead(s), CSM, relevant client champions
- Subject: [Company] <> [Client Name] [Feature] Setup

Body:

Hi [Client Name],

As we're going through your setup, I wanted to send you a note with some great news! [Company] would like to enable you to gain time back in your day by [feature benefit]. We are giving each of our customers [this feature] for free to see for yourself the value it can add to your organization. Here's a quick plan to get us started:

Let's find some time to connect next week [suggest times or include scheduling link if applicable].

Prior to our chat, here are some resources to get the ball rolling on how [this feature] can work for you:

- Resource #1
- Resource #2
- Resource #3



Have a use case in mind? Awesome! Let us know what you had in mind in your reply. We look forward to helping your team with [feature benefit]. Please let us know if you have any questions.

Thank you!



Pre-training email:

- Send To: Client admins + [Feature] champion(s)
- CC: Setup lead(s), CSM, and any other relevant client champions
- Subject: [Company] <> [Client Name] [Feature] Training - Test Files

Body: Hi [Clients' Names],

In anticipation of our [feature] training tomorrow, I'm attaching some files that we'll use to illustrate [feature]. Linked below are also some common use cases that our clients use [feature] for if you'd like to review before the call. We also ask that one of you log into [the product] and share your screen so that we can show you exactly how to navigate the tool. Feel free to select one use case from the options in the document attached that you'd like to dive into during the training. Let me know if you have any questions. Thanks!

*Note: Attach files for the [feature] use case if applicable



Training follow-Up email:

- Send To: Client [Feature] training attendees
- CC: Setup lead(s), CSM
- Subject: [Company] <> [Client] [Feature] Training Follow Up

Body:

Hi Everyone,

Thank you for joining the [feature] training today. We're excited to hear your feedback as you start using the tool! Below are some helpful resources to get you started, including our training recording.

[Client Name] Action Items:

- Action Item #1

Resources:

- Recording: [Company] <> [Client Name] [Feature] Training (zoom link here)
- Help Center article
- [Company] Support: Please reach out to me or [support email] if any questions come up during the close.

Thank you!