



CallRail

**Call follow-up scripts
and email templates
for small businesses**

How to best use these templates

Follow-up phone calls and emails are some of your best tools to keep leads warm and guide them toward a successful conversion. With so much riding on these interactions, it's worth leaning on tried-and-true engagement strategies to build an agent-lead relationship that offers mutual value for both parties.

To aid in your outreach, we've created call scripts and email templates for your business to use in its own outreach efforts. These should be used as an initial jumping-off point for your small business to write customized, effective call scripts and email templates that bolster your sales and marketing ROI.



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Follow-up phone calls and emails are some of your best tools to keep leads warm and guide them toward a successful conversion.”

Small business call scripts are used to help your sales representatives navigate conversations with potential customers. Likewise, email scripts can help you engage leads through relevant messaging that speaks to the right pain points.

These scripts and templates can also help your team become more comfortable immediately following up with leads, improving sales agent performance even when you aren't using these scripts directly.



Remember:

These are example templates, so you can add to, edit, or delete any copy or sections to best fit your small business. For the best results, use these templates as a framework for creating customized scripts targeted to your customer base.





First Call Follow-Up





First call follow-up

Voicemail script

Send a few days after initial conversation:



Hi **(first name)**,

This is **(your name)**. I've been thinking more about how we can help you with **(pain point)**. To demonstrate how **(your company name)** can **(build value and revenue for your business)**, I thought you would be interested to hear how we helped **(clients A and B)** handle those challenges.

After **(Client A)** started using our **(product or service)**, it was able to achieve a **(desirable outcome)** in the first six months.

(Client B) experienced similar success, using our **(product or service)** to **(desirable outcome)** in just **(time frame)**.

Even if you aren't ready to buy, do you have time for a short call, so I can share some additional benefits? Does **(date and time)** work for you?

Best,

(Your name)

How this would look for your legal business:



Hi Alex,

This is Charlie Smith. I've been thinking more about how we can help you with your recent traffic infraction. To demonstrate how Smith and Associates can help make the process run smoothly and save you time, I thought you would be interested to hear how we helped other clients handle this challenge.

After a client in your area started working with our team, she was able to get points back on her license, settle auto insurance increases, and paid a minimum fine for the violation.

Even if you aren't ready today, do you have time for a short call so I can share some additional details? Does Tuesday at 10:30 a.m. work for you?

Best,

Charlie Smith



Tips for businesses that provide legal services:

When calling leads or sending emails, always [speak with confidence](#).

Potential legal clients are looking for experts to guide them through uncertain and often stressful situations. By projecting confidence and subject expertise, you can build trust through each engagement.

>> [Get more inbound calls for your legal business](#)

First call follow-up

Email template

Send a few days after initial conversation:



Hi **(first name)**,

We talked **(on the phone/in person)** a few days ago about **(product or service)**. It was great getting to learn a little more about you, your business, and **(pain point customer raised in prior interaction)**.

I also wanted to share some additional information about **(product or service)**, and I would be happy to jump on call to walk you through it. Do you have time for a **(duration: 15 minute, 30 minute, etc.)** call? Does **(date)** and **(date)** around **(suggested time)** work for you?

Feel free to contact me at any time with questions about our **(product or service)**. You can reach me at our store here: **(phone number)** or feel free to set up some time to meet with my meeting link here: **(calendly link)**.

Best,

(Your name)

How this would look for your automotive business:



Hi Alex,

We talked on the phone a few days ago about trading in your 2011 Mazda CX-5. It was great getting to learn a little more about what you are looking for in your next family car, especially as you prepare for those travel baseball tournaments this summer.

I also wanted to share additional info on our trade-in program. Can we jump on a 15-minute call to walk through the benefits? Does Wednesday or Thursday around noon work for you?

Best,

Charlie Smith



Tips for car dealerships:

Demonstrate strong active listening skills when leads are discussing their [vehicle needs or preferences](#).

Attentive listening builds trust, and it helps you connect leads to vehicles that match the description of what they're looking for.

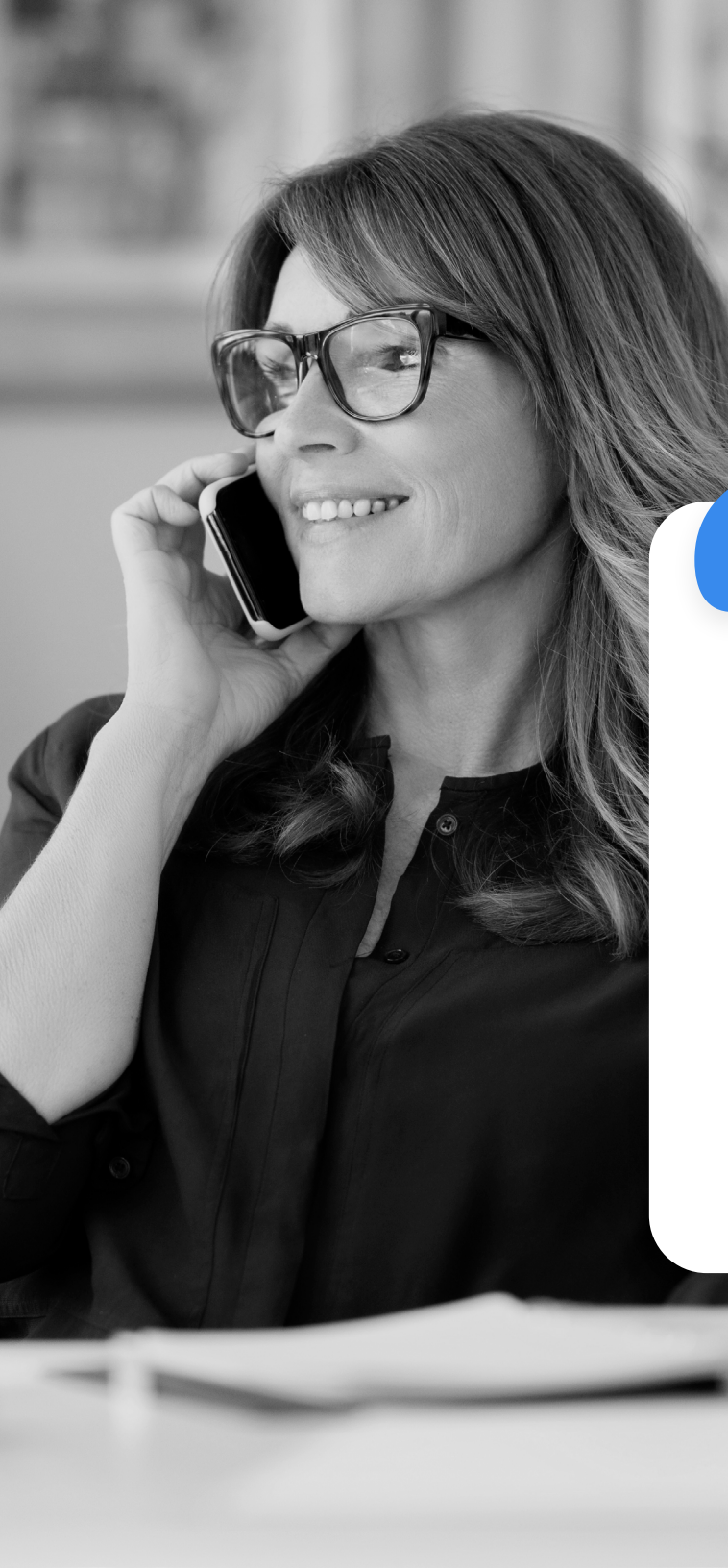
>> [Get more inbound leads for your automotive business](#)

Bonus tip:

Include a link to the trade-in program for them to learn more!



Second Follow-Up



Second follow-up

Voicemail script

Send a week after initial conversation, with no response:



Hi **(first name)**,

This is **(your name)** from **(store or company name)**. How are you doing?

I want to make sure we're helping you find **(the product or service)** you need. **(Refer back to the pain point and how your product or service can help)**.

I also wanted to share this **(whitepaper, e-book, or other premium content)** that I thought might be useful to you, based on our last conversation. I'll follow up via email.

Looking forward to connecting with you,

(Your name)

How this would look for your home services business:



Hi Alex,

This is Charlie from Piedmont Lawn Care.

I want to make sure we're helping you find the exact lawn care package you need to make your yard ready for spring. Weeds are growing quickly and taking care of them is important. Our gold package can help out with that and more.

I also wanted to share a lookbook of homes in your area that we've worked on to help you get a better idea of your options, based on our last conversation.

I'll follow up via email.

Let me know if you are still interested,

Charlie Smith



Tips for home services companies:

Show compassion and understanding for the [home services](#) problem your lead is facing.

Clogged toilets, faulty furnaces, and other residential issues are likely causing a lot of stress and worry for the homeowners contacting your business.

>> [Get more inbound leads for your home services business with local ads](#)

Second follow-up

Email template

Send a week after initial conversation, with no response:



Hi **(first name)**!

A few weeks back, we talked about **(product or service)**.
You may have already found what you're looking for, but in case you haven't, I would love to share this **(comparison/feature/benefit)**.
I also wanted to see if I could answer any questions to help your decision-making process?

Contact me at any time if you have questions about our
(product or service): **(phone number)**

We'd love to help you out if you're still looking for the right fit. You can also compare our **(product or service)**'s benefits to other alternatives using this helpful guide: **(comparison/feature/benefit sheet)**.

Best,

(Your name)

How this would look for your healthcare business:



Hi Alex!

A few weeks back, we talked about your smile and how you qualify for our Invisalign discount. You may have already found what you're looking for, and that's okay!

However, I just wanted to follow up one last time to see if there's anything you need from me. Are you still looking, and can I answer any questions to help your decision-making process?

Contact me at any time if you have questions about our Invisalign discount: 404-555-1234

We'd love to help you out if you're still looking for the right fit. You can also compare our Invisalign discount to other alternatives using this helpful guide: [3 Ways to a Straighter, Healthier Smile](#).

Best,

Charlie Smith



Tips for healthcare businesses:

When possible, review appointment histories and other general information before contacting a lead. This provides a stronger sense of personalized care.

>> [Live Q&A: How to improve patient care with call tracking](#)



Improve your strategy

There are two sides of the lead follow-up coin. One is knowing what to say. The other is knowing when to say it, based on how far along the customer is on their buying journey. Using call tracking software like CallRail can help you perfect both, so your sales department can level-up its lead follow-up and outreach game.

Better lead engagement and full-funnel communication leads to better sales performance, higher conversion rates, and greater ROI for your business.

Here's a closer look at how a call tracking platform like CallRail can help:

Know which sources drive your calls

By using dynamic number insertion (DNI) for your online marketing efforts, Call Tracking helps you pinpoint which sources generated a call. It then organizes all incoming leads into a timeline that shows every interaction each contact has with your business to make sure your team is routing leads and responding to calls as quickly as possible. The benefit? It sets up your business for better lead conversion rates.

Qualify leads faster

Powering up Call Tracking with Form Tracking accelerates lead qualification. It consolidates all customer interactions into a seamless timeline that allows your team to prioritize their outreach. It also equips them with the information they need to provide personalized customer experiences. This enables faster, more efficient lead outreach across your sales team.

Tighten up response time

Timely, consistent interactions keep your brand top-of-mind with a warm lead. But tracking these leads in their different stages can be tedious when you're managing them all on your own. [Lead Center](#) makes it easy to track each lead on its own individual timeline, improving your consistency when following up with leads — and keeping them engaged with your business.

Improve customer experiences

Nobody knows what your customers want better than your customers. Through [Conversation Intelligence](#), your business can leverage Artificial Intelligence to analyze the content of phone call conversations with leads. The content of these calls can help identify new keywords to target through marketing and relevant pain points to use in messaging and sales engagements with current and future leads. This improves your outreach and ongoing engagement with leads, while providing new insights to improve lead generation in the future.

**Want more visibility into
the quality of your calls?**

Start your free trial →

CallRail