



ASK FOR A CASE STUDY - EMAIL TEMPLATE

Social proof is really important in marketing a firm in the financial profession. Having good feedback from clients, especially if they are recognised brands/names, is a strong way to convince people to work with you. Send this email individually and personalize it by including the recipient's name. You may also add details about a project you worked on or points you might discuss on the call.

Before sending this email to your contacts, please make sure to do the following:

1. Replace all text in red font with your firm's information
2. Make sure your logo and signature appear in the email
3. Revise any content to ensure it reflects your firm

Subject line: Case study for (firm name)

Preview line: Will you give us your feedback?

--body of email--

Hi (first name), I hope you're well.

We're looking to add case studies from our valued clients to our website and use them in our marketing.

We'd love to interview you and get your feedback, is that alright?

I'll ask you a few questions about why you chose (firm name), how you've found it working with us, and we'd love to hear about the results you've seen from our support. It should only take about 15-20 minutes.

Does this week suit you for a chat? Please let me know what time works for you and I'll give you a call.

Thanks so much, we really appreciate it!

(your name and contact details)