

Outreach Sequence - Email First

Three emails. If nobody replies, they were not a prospect.

Why email and not the phone: Aqib sells from Pakistan. A cold call from an overseas number pays a trust tax we cannot afford to spend on a stranger. An email carrying one specific, checkable number does not. The phone is earned by a reply, never by dialling.

The reality to plan around

Most firms do **not** publish an email — they hide behind a contact form, and some hide the owner's name entirely. So a send list needs three passes per firm, in this order:

1. **Published email** if there is one (verify it on their own site, never guess a pattern).
2. **The contact form** on their site — paste the same body. Fine for email 1 and 2.
3. **LinkedIn** — find the owner-partner by name and send email 1 as a connection note.

Never invent an address. `info@` guesses bounce, and a bounce costs the domain's reputation.

Email 1 — the specific number (day 0)

Subject: chasing documents at {{firm}}

Hi {{first name}},

Quick question about {{firm}}'s busy season.

A survey of 367 firm owners found "getting information and documents from clients" was the single biggest workflow problem they had — 65.2% said so, up from 53.8% the year before. The firms I speak to usually put it at about five hours a week in season.

If you're running around {{client count}} clients, that's something like {{touchpoints}} document requests a season, and roughly \${{dollars}} a month of your most senior time.

We run that chase for firms automatically — we track what each client still owes you, ask them for the specific missing items by name, and escalate to you when they go quiet.

Worth 20 minutes? If it's not a fit, reply "audit" and I'll send you a free count of what chasing costs you instead.

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Rules for this email: - Under 150 words. It is a question, not a proposal. - **No attachments.** An unsolicited PDF on first contact reads as spam. - No prices. The audit is the next step, not the quote. - Fill in the three bracketed numbers, or delete the sentence. A wrong number is worse than none. - Never claim we have accounting clients. We don't yet. If asked, say so — "we're new to this niche, which is why the audit is free."

Email 2 — the free Chasing Audit (day 3, only if no reply)

Subject: re: chasing documents at {{firm}}

Hi {{first name}},

Following up once. The offer stands: send me last season's client list and what each one owed you, and in three days I'll send back a one-page count — how many document touchpoints you ran, how many stalled past the point work could start, and what those hours cost at your own rate.

No charge, and you keep the page whether or not we work together.

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Email 3 — the close-out (day 7)

Subject: re: chasing documents at {{firm}}

Hi {{first name}},

Last note from me — I'll assume the timing isn't right and stop here. If the chasing gets heavy this season, the audit offer stays open.

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Why a close-out email matters: it is the highest-reply email in most sequences, because it removes the pressure. Do not skip it, and do not send a fourth.

Never do these

- **Never send two emails in one day.** It reads as desperation.
- **Never “just checking in”.** Every email carries something new or it doesn't go.
- **Never quote the 87% or “5 hours” as our own finding.** They are other people's surveys — cite them as such or don't use them.
- **Never discuss tax treatment.** If they ask, “that's your call, I only handle the chasing.”
- **Never mention AI.** Say automated.