

## E-MAIL TEMPLATE TO SET-UP NETWORKING MEETING FOR USE WHEN NOT PROVIDED WARM INTRODUCTION - ONLY NAME AND E-MAIL

Offering to reach out to connections directly makes it easier for your connection and puts you in control. You simply need their approval to reference their name when you reach out.

**OBJECTIVE** To set-up networking meeting

**A** Keep it short - focus on this goal

**TITLE** Dan Smith - Referral from Jim Johnson

**B** Your name: Include on all e-mails, people will remember your name, not your e-mail address

**C** Referral name: This is why people will open the e-mail - because they recognize the name.

**BODY** Dear \_\_\_\_\_,

I am pursuing a CFO role in a consumer products company and Jim recommended you as a networking contact.

**D** Why are you reaching out to them.

I would like to find time to have coffee or a call to share our backgrounds and find mutual networking opportunities.

**E** Your ask of them.

Let's begin with your calendar, if you could please provide some possible dates/times to meet - then I can send an invite.

**F** What is their next step.

Look forward to meeting you.

Dan

**CONTACT** Dan Smith  
222-222-2222  
[smith.dan@provider.com](mailto:smith.dan@provider.com)  
[www.linkedin/in/dansmith](http://www.linkedin/in/dansmith)

**G** Give full information to create a contact

Include LinkedIn or personal website

### **INITIAL E-MAIL: Other tips**

- 1) If you have additional connections (e.g. same college, other colleagues in common, etc.) best to include in the first paragraph - to give them more reason to read on.
- 2) Assume your e-mail will be read their phone, keep it short and capture their attention on the first screen. Always good to send yourself a test e-mail - just to see how it looks.
- 3) If you need to add more information, do it below your signature, and reference the extra information in the body of the e-mail. Allows you to keep the main e-mail short and gives the reader the option to read on if they wish.
- 4) Your Targeted Role and resumes are optional on the first contact - its generally the strength of your referral that will get you the meeting.

### **PRE-MEETING:**

- 5) Regardless if you included it in your initial e-mail, send your marketing plan and resume the day before your meeting - especially if you had to book out a couple of weeks.

### **POST-MEETING:**

- 6) When you send a follow-up e-mail, include a short paragraph under your signature that summarizes your targeted role.