PREVAIL
TRANSACTION PARTNERS

FOR PROFESSIONAL ADVISORS

Client Introduction Email Templates

Ready-to-send language for raising exit planning with a client for the first time — plus the follow-ups for every way they respond.

How to use these

These are written to open a conversation, not to sell one. That is the whole design: an email about exit planning that reads like a pitch gets archived, and it makes the next one harder to send.

Copy the language, then change enough of it to sound like you. One specific reference to their business — a conversation you had, a number you know, something they mentioned last quarter — will do more for the response rate than anything else in this document.

BEFORE YOU SEND ANYTHING

These work on clients you already have a relationship with. Sent cold, the same words read as prospecting. If you do not know what their business did last year, this is not the right email for them yet.

ADVISOR NOTE

Send it from your own address as a plain-text message. No banner, no signature graphic, no tracking link. The moment it looks like marketing it gets read as marketing — and the point of coming from you rather than from us is that it doesn't.

SECTION 01

Subject lines

The subject decides whether the rest of this matters. Pick the one that fits the relationship — not the one that sounds most professional.

Have you thought about your exit plan?

Direct. Best for a client who has already raised the topic themselves.

Planning ahead: maximizing your business value

Value-framed. Works for the client who thinks in terms of growth rather than exit.

A conversation worth having about your business

Low-pressure and curiosity-driven. The safest default for a long relationship.

When is the right time to think about exit planning?

Question-framed. Good for owners who assume it is far too early.

ADVISOR NOTE

Avoid anything with “opportunity,” “solutions,” or an exclamation mark. Owners of businesses this size get a dozen unsolicited approach emails a month, and pattern-matching to those is the fastest way to lose the read.

SECTION 02

The main email

The full-length version. Roughly 250 words — long enough to explain the idea, short enough to read on a phone.

SUBJECT

A conversation worth having about your business

[Client Name],

I hope this finds you well. I wanted to raise something that I think could be valuable as you keep growing the business.

Most owners I work with are so focused on running the company that they rarely step back to think about the long term — specifically, how and when they might eventually transition out of it. Whether that's five years away or fifteen, having a plan in place well beforehand tends to change the outcome significantly.

Exit planning isn't really about selling. It's about building a business that runs independently, is worth more, and gives you options and control whenever you decide to make a decision. The work you'd do now — cleaning up financials, reducing how much depends on you personally, documenting how things actually get done — is what determines what's possible later.

I work with Prevail Transaction Partners, a firm that specializes in helping owners think through these transitions and, when the time comes, execute them. Their focus is preparation, value creation, and making sure owners actually understand their options — whether that means selling, transitioning internally, or something else entirely.

If it's worth exploring, even informally, I'm happy to make an introduction or just send over a few resources. No pressure and no commitment — just a chance to think it through.

Let me know what would be useful.

Best,

> [Your Name]

One edit worth making: the fourth paragraph is the only place this reads like an introduction to someone else. If your client is the type to bristle at that, cut it entirely and send the email without it — then raise Prevail on the phone once they respond.

SECTION 03

Two shorter versions

Same idea, different pressure. Use these when the long version would be too much.

The direct version

For a client who has already mentioned thinking about their long-term plans. Do not over-explain something they have already raised.

> [Client Name],
>
> You've mentioned thinking about long-term plans for the business a few times, so I wanted to follow up on that properly.
>
> I work with Prevail Transaction Partners, who specialize in exit planning and business transitions — helping owners prepare strategically, improve value ahead of a sale, and navigate the process with a clear head.
>
> Would a brief, no-obligation conversation be useful? I'm happy to set it up, or to send materials first if you'd rather look on your own time.
>
> [Your Name]

The educational version

For a client who is not thinking about this at all. It leads with something useful and never mentions selling.

> [Client Name],
>
> I came across some material recently on how owners strengthen their businesses and build more flexibility into them, and it made me think of our last conversation.

> Even if selling isn't anywhere on your radar, the principles are the same ones that make a company better to own day to day — reducing how much runs through you personally, documenting operations, tightening up the financial reporting.
>
> Thought you might find it useful. Happy to send it over if you're interested.
>
> [Your Name]

ADVISOR NOTE

The educational version has the highest response rate of the three and the longest path to a conversation. That trade is usually worth it: it starts a thread you can return to in six months without having asked for anything.

SECTION 04

Follow-ups

Three ways they respond, and what to send back for each.

IF THERE'S NO RESPONSE AFTER A WEEK

> [Client Name],
>
> Wanted to follow up on my note about exit planning. I know it may not be top of mind — no rush at all, just didn't want it to get lost in the shuffle.
>
> Happy to share more or answer questions whenever it's useful, even if that's a year from now.
>
> [Your Name]

IF THEY'RE INTERESTED

> [Client Name],
>
> Glad to hear it. I'd be happy to connect you with [Contact Name] at Prevail. They usually start with a confidential conversation to understand your goals and timeline — no pressure, just clarity on where things stand.
>
> Would you like me to make the introduction, or would you rather I send materials first so you can review on your own time?
>
> [Your Name]

IF THEY'RE HESITANT

> [Client Name],

> Completely understand. Exit planning can feel premature when the business is doing well — but that's usually the best time to think about it, precisely because you don't have to.
>
> It isn't about making a decision now. It's about having options later. If it's useful, I can send over a short workbook or a readiness assessment you can work through at your own pace, with nobody involved but you.
>
> Let me know what would help.
>
> [Your Name]

SECTION 05

What to attach

All three are white-labeled — put your own logo on them before they go out.

01 **The Business Sale Workbook** — the best first send. Reflective, no pitch, and it works for an owner who is years away

02 **Exit Readiness Assessment** — a scored self-assessment across six dimensions. Send this when they want something concrete

03 **Business Value 101** — how buyers actually value a business. Send this when the question is “what's it worth?”

04 **The confidential value estimate** — when they want a number rather than a framework

What makes these work

- ✓ **Personalize the opening line** — one specific detail about their business beats three paragraphs of general framing
- ✓ **Keep it conversational** — write it the way you would say it. Read it aloud before sending — if you would not say it, rewrite it
- ✓ **Remove the pressure explicitly** — say there is no obligation. Owners assume there is one unless told otherwise
- ✓ **Lead with preparation, not transaction** — the word “sell” in the first paragraph loses most of the audience
- ✓ **Offer a choice of next step** — a call, some materials, or an introduction. Letting them pick raises the odds they pick something

- ✕ **Don't send it as a marketing email** — no banner, no tracked links, no formatted template. Plain text from your own address

- ✕ **Don't follow up more than twice** — a third chase converts a soft no into a hard one and costs you the relationship's goodwill
- ✕ **Don't attach four documents at once** — pick the single one that fits where they actually are

> *The goal of the first email is a reply, not a meeting. Everything else follows from a client who wrote back because the note sounded like you rather than like a campaign.*

Making the introduction

When a client is ready to talk, a short email with both parties copied is all it takes — there is no referral process to navigate and nothing to sign on your end. If you would rather talk it through before putting anyone in touch, call first. That is often the more useful order.

PREVAIL TRANSACTION PARTNERS

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