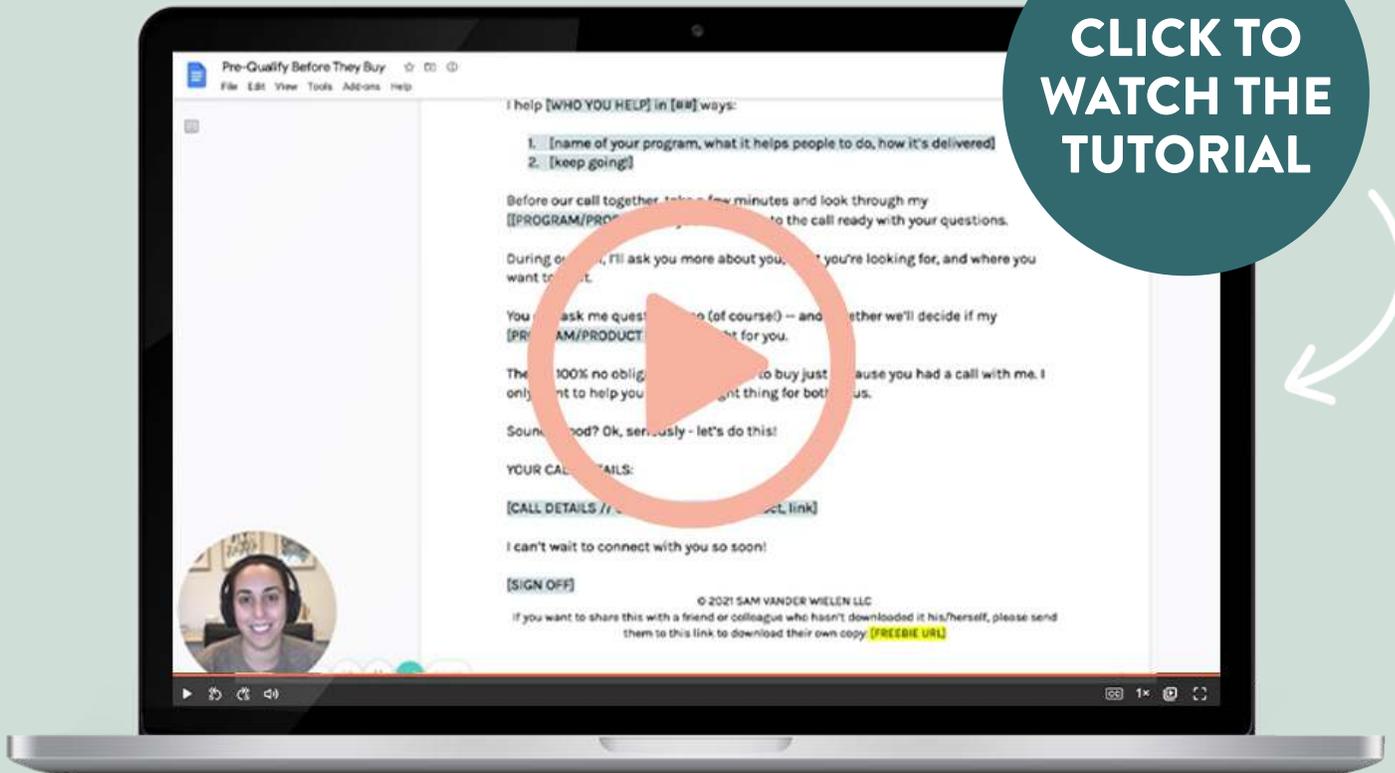




**PRE-QUALIFY  
BEFORE THEY BUY**

CLICK TO  
WATCH THE  
TUTORIAL



## INSTRUCTIONS

1. Edit the highlighted text to be your own.
2. Read the email all the way through so it makes sense for you.
3. Add your own style, vibe, and personality -- it'll be better that way!
4. Upload to your email service provider -- I use ConvertKit ([free trial here](#), or check out their [free plan here](#)) -- and automate, if you can.
5. Let me know if you like these email templates by [tagging me in your Instagram stories](#) or leaving a review for my On Your Terms podcast [here!](#)

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## EMAIL #1 - SEND IMMEDIATELY AFTER CALL SIGN-UP

### SUGGESTED SUBJECT LINE:

You've just made the best decision, **[[FIRST NAME]]** [CALL CONFIRMATION]

### GOAL:

Confirm, introduce yourself, get them excited about meeting you, show them what's possible for them based on what you've done in the past.

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## EMAIL TEMPLATE #1:

Hi [[FIRST NAME]]! You've just made the best decision to [result that you help people achieve/experience]. Why wouldn't you? You're one smart cookie.

Before I share your [call name] details below, I want to make sure you know just what's possible for you when you [result that you help people achieve/experience].

[BUST A MYTH -- ie., business success isn't just possible for people who have 50k followers on Instagram, meal prep is only possible for people who have hours on end to spend on Sundays, a fulfilling career is only possible for those who are super clear on their purpose in life, starting your own business is only possible for those who have a financially supporting spouse/partner, etc.]

[VALIDATE THAT IT'S POSSIBLE FOR THEM, TOO -- ie, You deserve and are worthy of all that same success, too.]

You know why I know this, [[FIRST NAME]]?

Because this isn't my first time at the wheel. I've helped [100s, thousands, loads, tons, lots, etc.] of [your ideal client, ie., women, new moms, coaches,] [what you've helped them achieve.]

[OPTIONAL: add some street cred - I've even got a podcast called \_\_\_\_\_, I run a YouTube channel where I teach people how to \_\_\_\_\_, or 'you might have seen me on \_\_\_\_\_']

It's time we sneak a peek into your future, [[FIRST NAME]].

Here's what a few of my clients who, just like you, booked my free [name of your call] and got [your result, ie. legally protected, financially secure, in touch with their body's signals, etc.] have said...

[TESTIMONIALS] \*Could also use other social proof here! Like screenshots, DMs.

[TESTIMONIALS]

[TESTIMONIALS]

I'm actually getting really excited FOR you, [[FIRST NAME]].... You're in for a treat!  
OK, now for the details of your call:

[CALL DETAILS // date, time, way to contact, link]

RESCHEDULING/CANCELLATION //

If you can't make your call at the scheduled time, please do your best to reschedule or cancel [[your policy, ie 24 hours] before your appointment time. I save this time just for me and you, and I only take on a limited number of these calls each week. So it's important to me that we both honor that commitment. If you need to reschedule or cancel for any reason, please do so HERE [link].

I can't wait to chat with you on [DAY] at [TIME].

Keep your eyes peeled for an email I've got coming for you [WHEN YOU'LL SEND IT, GENERALLY -- ie tomorrow, in a few hours, later today, the day before your call, etc.]

[SIGN OFF]

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## **EMAIL #2 - SEND AFTER EMAIL #1, depending on when people schedule their call**

### **SUGGESTED SUBJECTLINE:**

[REMINDER] Your call is coming up! Are we on the same page?

### **GOAL:**

Show them the door if they signed up for free advice

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## EMAIL TEMPLATE #2:

Hi [[FIRST NAME]]! I'm getting excited about our call together -- are you?

[[STORY ABOUT A TIME YOU THOUGHT SOMETHING WOULD BE ONE WAY, BUT IT TURNED OUT TOTALLY DIFFERENT - MAYBE A FUNNY ONE?]]

What does that have to do with our call that's coming up, [[FIRST NAME]]?

Well, I want to make sure we're on the same page before we chat. You're busy, I'm busy -- we've both got lots going on. And I want to respect both of our schedules and boundaries by making sure we know what this call is all about.

So as you know, I'm a [YOUR TITLE, ie. career coach who helps...]. But I'm not a [WHAT YOU'RE NOT, ie. a therapist, doctor, lawyer, accountant, nurse].

So that means that both on our call AND in our work together (if we worked together), I wouldn't offer you [TYPE OF] advice. [OPTIONAL: Add anything else you can't do, like : "I won't be able to diagnose what you've got going on..." or "I won't be able to prepare your taxes or advise you on investment strategies..."]

Instead, my work focuses on [WHAT YOU DO AND HOW YOU DO IT].

That's why our call will go something like this:

I'll get to know you and ask you some questions about [WHAT YOU DO/ASK ABOUT]. You'll have the opportunity to share more with me about what's coming up for you and what you're looking for help with. If we both feel like it's a good fit, at the end I'll share more with you about next steps and working together.

I won't offer you [TYPE OF ADVICE, legal, medical, financial etc] advice on the call [optional: or in our work together.]

If that's not what you signed up for, then it's 100% OK to cancel your call with me here (please do so by [TIME]).

But if that IS what you're looking for, then here's what you've got to look forward to:

[1-3 SHORT CLIENT TESTIMONIAL/SOCIAL PROOF]

Here are those call details one more time:

[CALL DETAILS // date, time, way to contact, link]

See you soon!

[SIGN OFF]



## EMAIL #3 - SEND AROUND 6-24 HOURS BEFORE CALL

### SUGGESTED SUBJECT LINE:

[We're doing this!] Quick question for you, **[[FIRST NAME]]**...

### GOAL:

Ask them to review your services/products before your call so they come ready with questions and have their objections ready for you :)

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## EMAIL TEMPLATE #3:

Hey **[[FIRST NAME]]**! Our call together is getting close -- but I've got a question for you first --

Are you getting excited to talk more about how you can **[[RESULT YOU HELP PEOPLE GET?]]**?!

Imagine what you're going to feel like once you've got **[[WHAT YOU HELP THEM ACHIEVE/EXPERIENCE]]**. Did you just get the chills?? Because I did!

*[[Italicized questions that get them imagining what's possible -- ie., Picture what it'd be like to be able to unplug from work, not worrying about yet another 11pm "emergency" email coming in, just as you're ready to crawl in.]]*

I know you're ready to **[[CHANGE THAT WILL BE MADE, ie, make bold moves in your business]]** -- but you're scared/worried/afraid that **[[COMMON OBJECTION IN YOUR FIELD, ie, you need more followers first, need to learn more about your subject, etc]]**

I get it -- I've definitely heard that before. And I've helped so many people like you move through it, too.

It's time to **[[RESULT]]** so you can:

- **[[List out tangible benefits they'll achieve/experience, ie. release your program to the world, crush that 5K, have fresh, nourishing meals on the table without breaking a sweat]]**
- **Etc**

I help [WHO YOU HELP] in [##] ways:

[name of your program, what it helps people to do, how it's delivered]

[keep going!]

Before our call together, take a few minutes and look through my [[PROGRAM/PRODUCT]] so you can come to the call ready with your questions.

During our call, I'll ask you more about you, what you're looking for, and where you want to shift.

You can ask me questions, too (of course!) -- and together we'll decide if my [PROGRAM/PRODUCT NAME] is right for you.

There's 100% no obligation or pressure to buy just because you had a call with me. I only want to help you if it's the right thing for both of us.

Sounds good? Ok, seriously - let's do this!

YOUR CALL DETAILS:

[CALL DETAILS // date, time, way to contact, link]

I can't wait to connect with you so soon!

[SIGN OFF]

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**WATCH MY FREE WORKSHOP**



**5 STEPS TO LEGALLY  
PROTECT & GROW YOUR  
ONLINE BUSINESS**

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