

# Top Customer Success Email Templates

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Make your customer relationship stronger

# Sales to customer success handoff email template

## Sales to customer success handoff – Informal version

Hi [Customer Name],  
Nice to meet you! I'm [CSM Name] and I'll be your Success Manager here at [Company Name].  
Here's me congratulating you on starting to use our product:



Welcome Jenny!

You and I are about to embark on a wonderful journey together ;) As [Sales Rep Name] mentioned, it's my job to make sure you're staying ahead of the curve on all things related to [Product Name].

To kick things off, would you like to hop on a short onboarding call with me to help you get settled? You can schedule a meeting by going to this link: [your scheduling link]

Be seeing you!  
Best,  
[CSM Name]

## **Sales to customer success handoff – formal version**

Hi [Customer Name]

I hope you're well. I'm [CSM Name], your official Success Manager here at [Company Name] and I'll be your main point of contact moving forward.

As [Sales Rep Name] mentioned, it's my job to make sure you're hitting all your goals with [Product Name]

To get things rolling, I'd like to schedule an onboarding kickoff call at your earliest convenience. You can schedule a meeting by going to this link: [your scheduling link].

Looking forward to helping you reach your goals!

Sincerely,

[CSM Name]

# “Checking in” email

## **“Checking in” email – High-touch product**

Hi [Customer Name],

How are you doing? We noticed that you haven't logged into the product recently. I actually have a few recommendations based on a quick analysis I've made, for features that will help you get the most out of the product and help you achieve your KPIs.

I'd be delighted to set up a call with you and share those insights.

Here are some suggestions I'd love to discuss:

[a]

[b]

[c]

As always, If you need help with something, anything at all. don't hesitate to ask. I'm just an email away!

Catch you soon,

[CSM Name]

## **“Checking in” email – Low-touch product**

Hi [Customer Name],

I hope you’re having a great week! I’m checking in to ask if [Product Name] is meeting your needs and expectations so far.

As a reminder, you can visit our Knowledge Base [insert Knowledge Base link here] to find more information about our product and company at any time.

If you have any questions or concerns about [Product Name], I’d be delighted to provide some assistance. Feel free to send me an email and I’ll respond as soon as I can.

Sincerely,

[CSM Name]

Protip: Just like with the handoff email, this is a good time to step up your personalization game. If a customer has been missing in action for a while, why not tell them you miss them? A “missing you” animation GIF marks the spot.

Connection to the product  
team that wants to get  
feedback



## Sharing feedback directly with CSM

Hi [Customer Name],

How do you like our [Product Name] so far? We'd like to hear about it! Your feedback will help us figure out what we need to improve to serve you better.

If you can, please take a moment to fill out our survey. Shouldn't take longer than [number of minutes needed]

Thanks!

Best,

[CSM Name]

## Introducing the Product Manager

Hi [Customer name],

Thank you for using [product/service name] to [product benefits]. We hope you're enjoying your experience with us. We're always working to make sure [product name] is exceeding your expectations.

To help us make the right improvements to [Product Name] we wanted to ask if you can spare a few minutes to leave us an honest feedback. Your thoughts on our product will help us determine how we can serve you better.

If you're in - I'd love to introduce you to [product manager name] who will schedule a call with you and listen to everything you've got to share with us.

Thank you!

Regards,

[CSM Name]

# Renewal email

## Renewal email – Informal version

Hi [Customer Name],

Can you believe that it's been a year since you've become a [Company Name] member/subscriber? We hope you've enjoyed your experience with us over the last 12 months!

Here's a heads up, though: your annual subscription is coming to an end on [subscription end date].

With that said, we hope you'll choose to join us again for another year. We have a lot in store for you in the coming months and you don't want to miss it!

To renew your subscription with us, just click on the button below and [enter the required steps].

Looking forward to having you back!

Talk soon,

[CSM Name]

### Formal Version:

Hi [Customer Name],

I hope all is well with you and that you continue to enjoy your experience with us.  
I'd like to bring to your attention that your annual subscription is expiring on [subscription end date].

If you'd like to renew your subscription with us, just click on the button below and [enter the required steps].

I look forward to having you on board again!

**EverAfter** is the best place to create those customer journey experiences. Create an onboarding plan that paves the way for your customers, centralizes everything your customer needs during this period, and makes them feel they are in good hands.

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