



Client Success Hub

1. Welcome + Next Steps

Subject: Welcome to [Company] — Here's What's Next

Hi [Client Name],

We're excited to get started. To make sure we're aligned from Day 1, here's what happens next:

- [Step 1]
- [Step 2]
- [Kickoff date or link to book a call]

Let me know if anything is unclear. I'm here to make this easy.

— [Your Name]

Client Success Manager

2. Post-Kickoff Recap

Subject: Kickoff Recap + Follow-Up Items

Hi [Client Name],

Thanks again for your time today. Here's a quick summary of what we covered and what's coming up:

- Key decisions: [Brief notes]
- Action items: [Assigned owners and due dates]

We're on track to [milestone/goal]. You'll hear from me again by [date] with updates.






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3. Project Update (No Surprises)

Subject: [Client/Project]: Weekly Status

Hi [Client Name],

Here's your update for the week of [date]:

-  Done
-  In Progress
-  Risks/Issues

No action needed on your end unless noted. Let me know if you'd prefer a different format or frequency.

4. Delayed, But Under Control

Subject: [Deliverable] – Slight Delay

Hi [Client Name],

Quick heads-up: [Explain the delay in one sentence — no excuses]. Here's what we're doing to keep things moving:

- [Fix or mitigation]
- Revised ETA: [New date]

I'll keep you posted if anything changes again. Appreciate your patience.

5. Feature Request Response

Subject: Re: [Feature Request]

Hi [Client Name],

Thanks for bringing this up. We've passed your request to [Product/Dev team], and here's where it stands:

- [In review / planned / not on roadmap]



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Even if this doesn't happen immediately, your feedback helps us shape the roadmap. I'll keep you posted.

6. Upsell, Soft Approach

Subject: Saw Something You Might Like

Hi [Client Name],

As we've been working together, I noticed [specific problem or opportunity]. We have something that could make a real difference: [Product/Service].

Happy to walk you through it if you're interested — no pressure.

7. Smoothing Over a Mistake

Subject: We Messed Up — Here's Our Fix

Hi [Client Name],

We dropped the ball on [what happened], and I want to personally apologize. Here's what we're doing to fix it and prevent it from happening again:

- [Correction]
- [Process change]

Let me know if you'd like to discuss live — I'm available [insert availability].

8. Pre-Renewal Check-In

Subject: Let's Chat Before Your Renewal

Hi [Client Name],

Your renewal date is coming up on [date], and I want to check in early. Let's make sure you're still getting full value and talk through what's next.

Here's my availability: [link or time options].

Looking forward to hearing how things are going on your side too.



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9. Client Feedback Request

Subject: Quick Feedback?

Hi [Client Name],

I'd love your input on how things are going so far.

- What's working well?
- What could be better?
- Anything I can do differently to support you?

No need for a long write-up — even a few lines would help.

Appreciate your time either way.

10. Friendly Nudge (Ghosted, Not Gone)

Subject: Just Checking In

Hi [Client Name],

Haven't heard back in a bit — just making sure everything's okay on your end. If this project is still active, let me know how you'd like to proceed.

If priorities have shifted, no problem. Just say the word, and we'll adjust on our side.