



Introduction Email to New Customer Template (For Partner-Sourced Deals)

Subject: Welcome to [Product] — quick kickoff with [Your Company]

Hi [Customer first name],

I'm [Your name], [role] at [Your Company]. Thanks to [Partner name] for the intro.

You've selected [plan / package] to achieve [one-line outcome, e.g., "centralize partner deal registration and reporting in your CRM"]. I'll own your onboarding; [CSM/Implementation lead] will run delivery.

Can we meet for 30 minutes to confirm timeline, roles, and success criteria?

- [Option A: Tue 10:00—12:00 CET]
- [Option B: Wed 14:00—16:00 CET]

Or grab another time that suits: [booking link]

We'll use [Slack/Teams/email] for day-to-day and track milestones in a short mutual action plan. If you have key docs (security, SSO), feel free to drop them in the invite.

Thanks,

[Your name]

[Title] — [Your Company]

[Phone] | [Calendar link]