

CHAPTER 8 / APPLY

Sales, Renewal, Recruiting and Management Template Vault

Copy proven starting points for daily CRM work, then adapt and approve them for your product, market, team voice and communication rules.

75% CRM execution	25% growth support
Workflow, data, follow-up, reporting and adoption.	Ads, recruiting, AI, training and templates.

Outcome

This chapter creates one approved library for the repetitive work around the CRM: first response, follow-up, appointment control, objection handling, sale handoff, client service, renewals, referrals, recruiting, onboarding, coaching, meetings, reporting, and campaign operations.

Templates improve speed only when they remain connected to the record. Before sending or using one, confirm the person, situation, permission, product facts, next action, and required disclosure. After use, record the activity and next step in Conquest.

A template is a starting point, not permission to send. Replace every bracket, verify every fact, and obtain the approval required for the real market and channel.

1. Build one controlled library

Every approved template needs:

- Template ID and clear name.
- Business purpose and intended audience.
- Allowed channel.
- Trigger condition in the CRM.
- Required placeholders.
- Claims or facts that require verification.
- Required disclosures or opt-out language.
- Owner, approver, version, approval date, and review date.
- Retirement status for old versions.

Do not let every agent maintain a private folder of slightly different scripts. Keep one master version and allow personalization only inside defined fields.

2. Select the template from the CRM state

Choose the message because of an observable event:

- New lead received.
- First contact attempt failed.
- Two-way contact occurred.
- Appointment booked.
- Appointment approaching.
- No-show occurred.
- Information requested.
- Proposal delivered.
- Decision date approaching.
- Opportunity moved to nurture.
- Sale accepted.
- Client review due.
- Renewal window opened.
- Referral requested.
- Candidate applied.
- Candidate interview scheduled.
- New user started onboarding.
- CRM activity fell below standard.

If the record does not show why the template applies, fix the record before sending.

3. Personalize without creating risk

Safe personalization uses known, necessary information and changes the message meaningfully:

- First name.
- Requested topic.
- Agreed date or time.
- Assigned representative.
- Approved next step.
- Relevant location or service where needed.

Avoid unnecessary personal details, inferred vulnerabilities, sensitive data, or references that could feel intrusive.

4. Channel rules

Phone

Use a structure rather than reading word for word: identify, state the reason, confirm permission to continue, ask a useful question, agree the next action, and record it.

SMS or messaging

Keep it short, identify the sender, explain the context, ask for one action, and include required opt-out wording. Do not send detailed or sensitive customer information.

Email

Use a clear subject, short opening, useful body, one primary CTA, approved signature, and required disclosures. Avoid attachments containing private data unless the approved secure process requires them.

Internal CRM note

Record observable facts, customer-stated information, agreed next action, owner, and date. Do not write insults, diagnoses, speculation, or irrelevant personal information.

5. The five-part communication structure

Most effective templates can be built from:

- 1 Context - why this message is relevant.
- 2 Value - what useful next step is offered.
- 3 Specificity - what will happen or what is needed.
- 4 Action - one clear reply, call, booking, or task.
- 5 Control - permission, timing, opt-out, or alternative.

Do not hide the CTA inside a long paragraph.

6. Follow-up system

A follow-up sequence should vary purpose, not repeat "just checking in."

- Attempt 1: confirm request and offer two times.
- Attempt 2: provide one useful preparation point.
- Attempt 3: restate the specific next step.
- Attempt 4: offer a later date or different approved channel.
- Final active attempt: close the loop respectfully.
- Nurture: schedule only with a real reason and permitted future contact.

Every sequence needs a stop rule. Stop or change course when the person declines, withdraws permission, completes the action, is invalid, is assigned elsewhere, or reaches the approved attempt limit.

7. Objection handling structure

Do not "overcome" an objection by arguing. Use:

- 1 Acknowledge the concern.
- 2 Clarify what the person means.
- 3 Confirm the decision criteria.
- 4 Respond only with approved facts.
- 5 Check whether the concern is resolved.
- 6 Agree the next action or close respectfully.

Record the real objection category and outcome in the CRM. This creates useful coaching and product feedback.

8. Renewal system

Renewals should be a dated workflow, not a last-minute message.

Recommended checkpoints, adjusted to the product and rules:

- Early review window: confirm ownership and missing data.
- Preparation: gather approved documents and changes.
- Review invitation: explain purpose and scheduling options.
- Review completed: record needs, facts and next action.
- Decision follow-up: track outstanding items.
- Completion: update status, effective date and next review.

Do not imply automatic continuation, savings, eligibility, or coverage without verified facts.

9. Recruiting and onboarding system

Recruiting templates need the same control as customer communication. Use accurate role, location, responsibilities, requirements, compensation facts, employment status, interview process, and data notice. Avoid earnings promises and vague hype.

New-user onboarding templates should drive observable CRM tasks: sign in, complete role lesson, work a test lead, record an activity, schedule a next action, advance a stage, and demonstrate the relevant handoff.

10. Management templates

Management templates should turn data into action:

- Daily huddle agenda.
- Weekly pipeline review.

- One-to-one coaching.
- Data-quality correction.
- Missed-SLA escalation.
- Campaign review.
- Renewal risk review.
- Monthly operating review.

Each ends with owner, due date, CRM measure, and review date.

11. Template approval workflow

- 1 Author drafts from an approved process.
- 2 Process owner verifies operational accuracy.
- 3 Compliance or legal reviewer verifies required wording where applicable.
- 4 Channel owner checks length and formatting.
- 5 A role champion tests the template with fictional data.
- 6 Owner publishes one master version.
- 7 Old versions are retired.
- 8 Performance and complaints are reviewed on schedule.

12. Template performance

Do not optimize only for replies. Compare the downstream CRM outcome.

Template family	Primary operational measure	Downstream measure
First response	Speed and contact rate	Qualification rate
Appointment	Confirmation and show rate	Completed meeting
Proposal follow-up	Response and decision timing	Sale or clear loss reason
Renewal	Reviews completed on time	Retention and documented outcome
Recruiting	Screen and interview completion	Training and 90-day retention
Coaching	Behavior completed	CRM process metric improvement

13. Chapter assignment

- 1 Choose the 15 templates the agency needs this month.
- 2 Add template ID, trigger, owner, channel, approval and review date.
- 3 Replace bracketed text for the actual approved use case.
- 4 Test each with fictional data.

- 5 Publish one master version and retire duplicates.
- 6 Link each template to the relevant CRM stage or operating routine.
- 7 Review performance using downstream outcomes.

The chapter is complete when a new team member can select the correct approved template from an observable CRM state, personalize it safely, use it through the approved channel, and record the next action.

EDITABLE TEMPLATE PACK

Copy these into your working documents. Replace bracketed placeholders, obtain the required approval, and connect every live process to a CRM owner and field.

Master template control card

```
TEMPLATE ID: [Category-###]
NAME: [Clear name]
PURPOSE: [Business purpose]
TRIGGER: [Observable CRM state]
AUDIENCE: [Who receives or uses it]
CHANNEL: [Phone / SMS / email / internal]
REQUIRED PLACEHOLDERS: [List]
REQUIRED DISCLOSURES: [List]
STOP RULE: [Rule]
OWNER: [Name]
APPROVER: [Name]
VERSION: [#]
APPROVED: [Date]
NEXT REVIEW: [Date]
STATUS: [Draft / approved / retired]
```

A. New lead and first response

Template A1 - Phone opening

```
Hello [First name], this is [Name] from [Organization]. You requested [approved offer]
through [source]. Is now an appropriate time for a brief conversation about what you
wanted to review?
```

Template A2 - Immediate acknowledgement

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Hi [First name], [Organization] received your request for [offer]. [Assigned person]
will contact you [approved response window]. If another time is better, reply with
your preference. [Required wording]
```

Template A3 - Two time options

```
Hi [First name], this is [Name] from [Organization] about your request for [topic].
Would [time A] or [time B] be better for a short call? [Required wording]
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Template A4 - First email

Subject: Your request for [topic]

Hi [First name],

Thank you for requesting [offer]. I am the person assigned to help. The first conversation covers [approved topics] and whether a next step is appropriate.

Would [time A] or [time B] work? You may also reply with a preferred time.

[Signature and required disclosures]

Template A5 - Missing information

Hi [First name], I am preparing for our [call/review]. To complete the next step, please confirm [minimum non-sensitive item] through [approved secure method]. Please do not send sensitive information by ordinary message. [Required wording]

B. Follow-up and no response

Template B1 - Useful preparation point

Hi [First name], before we speak about [topic], it may help to note [one approved preparation item]. I can call [time A] or [time B]. Which works better? [Required wording]

Template B2 - Context reminder

Hi [First name], you requested [offer] on [date]. I am following up so the request does not remain open without a next step. Would you prefer a call this week, a later date, or for me to close the request? [Required wording]

Template B3 - Different channel option

Hi [First name], I have not been able to reach you about [offer]. If [approved alternative channel] is easier, reply with your preference and a suitable time. [Required wording]

Template B4 - Final active follow-up

Hi [First name], I will close this request for now so I do not keep contacting you. If you would still like help with [topic], reply [approved response] and I will reopen it. [Required wording]

Template B5 - Nurture confirmation

Thanks, [First name]. I have noted that [approved month/date] is a better time to revisit [topic]. I will follow the permitted contact process then. If your preference changes, contact us at [approved contact].

C. Appointment control

Template C1 - Appointment confirmation

Confirmed: [meeting type] with [representative] on [date] at [time/time zone] through [location/channel]. We will cover [topics]. To reschedule, use [approved method]. [Required wording]

Template C2 - Day-before reminder

Reminder: your [meeting type] is tomorrow at [time/time zone]. Please prepare [approved items]. Reply [confirm word] to confirm or use [method] to reschedule.

Template C3 - Same-day reminder

Hi [First name], a quick reminder about our [meeting type] today at [time]. Join or arrive through [approved instruction]. If plans changed, reply here so we can reschedule.

Template C4 - Reschedule

No problem. Available alternatives are [option A], [option B] or [option C]. Which works best? I will send a new confirmation after you choose.

Template C5 - No-show

Hi [First name], we missed you for the [meeting type] at [time]. If you still want to discuss [topic], I can offer [option A] or [option B]. If not, tell me and I will close the request. [Required wording]

D. Discovery and meeting structures

Template D1 - Discovery agenda

1. Confirm purpose and available time
2. Understand current situation
3. Clarify goals and timing
4. Identify constraints and decision criteria
5. Explain only approved relevant options or next steps
6. Agree owner, action and date
7. Record outcome in the CRM

Template D2 - Discovery questions

What prompted you to review this now?
What is working well in the current situation?
What would you like to improve or understand?
What timing matters?
Who else is involved in the decision?
What information would help you decide the next step?
What should happen after this conversation?

Template D3 - Meeting recap email

Subject: Agreed next steps - [topic]

Hi [First name],

Thank you for today's conversation. We discussed [verified summary]. The agreed next actions are:

- [Action] - owner [name] - due [date]
- [Action] - owner [name] - due [date]

Our next contact is [date/time]. If anything above is inaccurate, please reply.

[Signature and required disclosures]

E. Objection handling

Template E1 - "I need to think"

That makes sense. Which part would be most useful to think through - the fit, timing, cost, information, or something else? I can answer with approved facts, or we can agree a date for your decision.

Template E2 - "Send information"

Of course. To avoid sending irrelevant material, which question should the information help you answer? I will send the approved resource and schedule a brief follow-up for [date] if that is acceptable.

Template E3 - "Too expensive"

I understand cost matters. Are you comparing the total cost, payment timing, the value of the outcome, or another option? I will use only the approved pricing and explain what is and is not included.

Template E4 - "Already have something"

That may be the right answer. What do you value most about the current solution, and what prompted the conversation today? If there is no meaningful gap, we should not force a change.

Template E5 - "Not now"

Understood. Is there a real future date or event that would make a review useful, or should I close the request? I will record your preference and follow it.

Template E6 - "Need another decision-maker"

That is reasonable. What information will they need, and would a joint conversation prevent anything being lost in translation? We can schedule that only if everyone agrees.

F. Proposal and decision follow-up

Template F1 - Proposal delivered

Hi [First name], the approved information for [topic] was provided on [date] through [secure method]. Please review [specific sections]. Our agreed decision or question time is [date/time]. Contact me if anything is unclear.

Template F2 - Decision-date reminder

Hi [First name], we agreed to reconnect on [date] about [topic]. What questions remain before you can choose the next step? I will answer only from the approved information.

Template F3 - Clear close

To keep the record accurate, should the next step be [approved action], a later review date, or closing this opportunity? Any option is acceptable; I want to record your decision correctly.

Template F4 - Lost opportunity acknowledgement

Thank you for letting me know. I have closed the request as [approved reason category]. If you are comfortable sharing, what mattered most in the decision? I will record only relevant feedback. [Required wording]

G. Won sale and client handoff

Template G1 - Internal won-sale checklist

- [] CRM stage changed to Won
- [] Approved product and value fields complete
- [] Effective date confirmed
- [] Client record created or linked
- [] Required documents stored in approved location
- [] Handoff owner assigned
- [] Welcome communication approved
- [] Renewal or review date entered
- [] Commission fields reviewed by authorized role
- [] Next action scheduled

Template G2 - Client welcome

Subject: Welcome and next steps

Hi [First name],

Thank you for completing [approved process]. Your contact for [service] is [name/role] through [approved contact]. The next planned step is [action/date]. Use [approved secure method] for private information.

[Required disclosures]

Template G3 - Internal handoff

CLIENT RECORD: [CRM ID]
OUTCOME: [Approved category]
EFFECTIVE DATE: [Date]
RESPONSIBLE OWNER: [Name]
OPEN ITEMS: [List]
NEXT ACTION: [Action/date]
DOCUMENT LOCATION: [Approved reference, not private attachment]
RISKS OR EXCEPTIONS: [Facts only]

H. Renewal and client review

Template H1 - Review invitation

Hi [First name], it is time for the planned review of [approved topic]. The purpose is to confirm what has changed, answer questions, and agree any appropriate next step. Would [time A] or [time B] work? [Required wording]

Template H2 - Review preparation

Before the review, please prepare [approved non-sensitive list]. Send private information only through [approved secure method]. We will cover [topics] and record the agreed next action.

Template H3 - Renewal at-risk internal alert

RECORD: [CRM ID]
RENEWAL/REVIEW DATE: [Date]
RISK REASON: [Approved category]
LAST CONTACT: [Date/outcome]
NEXT ACTION: [Action/date]
OWNER: [Name]
ESCALATION: [Name/date]

Template H4 - Renewal completion

Hi [First name], the [review/renewal] step was completed on [date]. The confirmed next action is [action/date]. Contact [name/role] through [approved contact] with questions. [Required wording]

I. Referrals and reviews

Template I1 - Referral request

If you know someone who would genuinely benefit from a conversation about [approved topic], you may share our [public link/contact]. Please do not send us their private details without their permission.

Template I2 - Feedback request

Thank you for working with [Organization]. Would you be willing to share honest feedback about the process? Positive, neutral and critical feedback are all useful. Please do not include private account or policy information.

Template I3 - Testimonial permission request

You provided the following feedback: "[EXACT QUOTE]." May we publish this exact wording with [name/role/company or anonymous label] on [channels] until [date]? You may decline or withdraw future use through [contact]. Please confirm the exact approved attribution.

J. Recruiting

Template J1 - Application acknowledgement

Hi [First name], [Organization] received your application for [accurate role]. The next step is [process] and the expected review period is [time]. Do not send sensitive documents until requested through the approved method. [Privacy notice]

Template J2 - Screening invitation

Hi [First name], we would like to schedule a [length] screening conversation for [role]. Available options are [A], [B] and [C]. The conversation covers [job-related topics]. Reply with your preference.

Template J3 - Interview confirmation

Confirmed: interview for [role] on [date/time/time zone] with [names/roles] through [location/link]. Format: [structure]. Please prepare [job-related item]. Contact [approved contact] to reschedule.

Template J4 - Candidate decline

Hi [First name], thank you for your time and interest in [role]. We will not progress the application to the next stage. We appreciate the opportunity to learn about your experience. [Approved data-retention or future-opportunity wording]

Template J5 - Offer next steps

Hi [First name], we would like to discuss the next step for [role]. This message is not a substitute for the formal approved documents. Please choose [time A] or [time B] for the conversation.

K. New-user onboarding

Template K1 - Day-one checklist

- [] Account created with correct role
- [] Sign-in tested
- [] Chapter 0 completed
- [] Role chapter completed
- [] Test lead opened
- [] Activity recorded
- [] Next action scheduled
- [] Stage advanced correctly
- [] Handoff demonstrated
- [] Support path understood

Template K2 - Training completion

USER: [Name]
 ROLE: [Role]
 MODULES: [List]
 TEST WORKFLOW: [Workflow]
 EVIDENCE: [Demo record]
 RESULT: [Pass / repeat]
 COACH: [Name]
 NEXT REVIEW: [Date]

L. Management and coaching

Template L1 - Daily CRM huddle

1. Unassigned new leads
2. Overdue next actions
3. Qualified without appointment
4. Decision pending without follow-up
5. Won not converted to client
6. Renewals without action
7. Blockers with owner and due time

Template L2 - One-to-one coaching

OBSERVABLE CRM METRIC: [Metric/period]
 PROCESS STANDARD: [Standard]
 AGENT VIEW: [What they observe]
 EVIDENCE REVIEWED: [Records/calls without unnecessary private detail]
 ONE BEHAVIOR TO PRACTICE: [Behavior]
 SUPPORT: [Training/template/demo]
 OWNER: [Name]
 DUE: [Date]
 REVIEW METRIC: [Metric/date]

Template L3 - Data-quality correction

Hi [Name], [#] records assigned to you are missing [owner/stage/next action/outcome].
 Please correct them by [time] using [guide]. If the field does not fit the real
 situation, report the process issue rather than entering false data.

Template L4 - Missed-SLA escalation

SOURCE/QUEUE: [Name]
 RECORDS AFFECTED: [#]
 SLA: [Standard]
 ACTUAL: [Result]
 IMMEDIATE OWNER: [Name]
 CAPACITY ACTION: [Reassign/pause/other approved step]
 ROOT-CAUSE REVIEW: [Owner/date]

Template L5 - Weekly pipeline review

1. Volume by source and owner
2. Contact speed and contact rate
3. Qualified and appointment conversion
4. Stage aging and stalled records
5. Sales, losses and reasons
6. Client handoff and renewal coverage
7. Data-quality exceptions
8. Coaching commitments
9. One process change with owner and due date

Template L6 - Monthly operating review

CRM ADOPTION: [Metrics]
 PIPELINE: [Metrics]
 CLIENTS/RENEWALS: [Metrics]
 CAMPAIGNS: [Downstream results]
 RECRUITING: [Funnel and retention]
 TRAINING: [Completion and behavior]
 RISKS: [Top three]
 DECISIONS: [Scale/repair/pause]
 OWNERS AND DATES: [List]

M. Template review log

Template ID	Version	Owner	Last approved	Usage	Downstream result	Complaints/issues	Decision	Next review
[ID]	[#]	[Name]	[Date]	[#]	[Metric]	[Details]	Keep/revise/retire	[Date]