Client Contact Engagement & Re-Engagement Toolkit

A practical communication toolkit for coaches/service providers and service provider to support motivation, maintain engagement, and re-engage clients who lose momentum!

Compass Rose Consulting
Donna Lynn Price

Welcome, Welcome!!

Re-engaging clients or contacts can be good for your business. Clients or contacts that are already familiar with you and your work are more likely to do business with you than new contacts.

Email is an excellent tool for maintaining contact and connection.

Let's get started!

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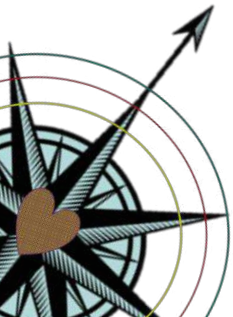


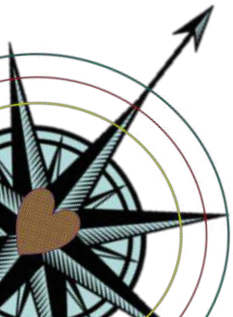
Many coaches/service providers struggle to maintain consistent contact with clients outside their sessions/appointments. Email is a great way to keep in touch, either at the beginning when motivation is high or to re-connect with clients undergoing motivation dips.

How to Use This Resource:

- Add the 10-day sequence to your onboarding process
- Choose a re-engagement message if a client becomes quiet or inconsistent
- Adapt the tone and language to your style. Keep it clear, kind, and supportive
- Pair these with a check-in accountability form or reflection prompt if needed

This bonus document is in two parts:

1. 10-Day Client Motivation Booster Email Sequence
2. Disengaged Client Rescue Emails



Part 1: 10-Day Client Motivation Booster Email Sequence

Use this email sequence during the first 10 days of a client relationship or group program to set the tone, keep clients engaged, and reinforce progress. Save yourself time by uploading the messages to be sent out automatically at a frequency that will suit your audience.

They can be adapted and sent as DMs, private group posts or SMSs if you prefer.

Day 1 – Set a Strong Start

Welcome the client and prompt them to reconnect with their original goal for coaching. Encourage them to define what success looks like and why it matters now.

Example prompt to include:

- "Why is this the right time for you to take action on this goal?"
- "What will success look or feel like for you in 3 months?"

Example

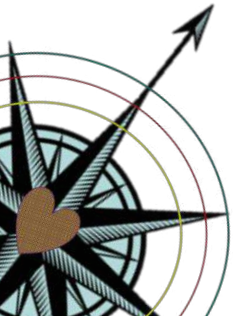
Subject: Let's set you up for success

Hi [Client Name],

Welcome! I'm so glad you've taken this step. Before we go too far, I'd love for you to take a moment to reflect on the big picture.

What brought you here? What do you want to get out of this experience?
And most importantly—why now?

Knowing your answers will help guide how we work together and ensure your goals stay front and center.



Feel free to jot down your thoughts or send them to me if you'd like to share.

Talk soon,

[Your Name]

Day 3 – Tackle the Motivation Dip

Clients often feel a dip in motivation a few days in. Use this check-in to normalize the experience and reframe any wobble as part of the process.

Example prompt:

- "What's gone well so far?"
- "Is anything starting to feel unclear or stuck?"

Example

Subject: It's early days

Hi [Client Name],

It's very common to hit a small dip a few days in, especially once the initial energy wears off. If that's happening, it doesn't mean anything's gone wrong.

Here's a quick check-in:

- *What's one thing that's gone well so far?*
- *What's felt harder than expected?*
- *Do you need a quick reset?*

You don't need to push through. Follow your coaching goals, pause, reflect, and refocus if needed. Let me know if you want help adjusting your approach.

Best,

[Your Name]

Day 5 – Handle Setbacks Without Losing Momentum

If something hasn't gone to plan, remind the client that progress doesn't require perfection. Encourage a reset rather than a restart.

Example prompt:

- "What's one thing you've learned this week, even if things didn't go perfectly?"
- "What's one small way you can move forward from here?"

Example

Subject: What to do when things don't go as planned

Hi [Client Name],

Some days won't go to plan. That's normal, and it doesn't undo your progress.

Instead of starting over, try this:

- *What did you learn from the past few days?*
- *What would help you move forward with less pressure?*

Coaching is about building habits not getting everything right the first time. You've still got this.

I'm here if you want to talk it through,

[Your Name]

Day 7 – The Power of Small Wins

Draw attention to the importance of consistency of action over big outcomes. Encourage reflection on what's working and how it feels to follow through.

Example prompt:

- "What's a small win you've had that you may have overlooked?"
- "What helped you follow through?"

Example

Subject: Let's celebrate the progress you've made

Hi [Client Name],

You've made it a full week in. Well done. Whether it's big or small, something has likely shifted.

What's one small win you're proud of?
And what helped you follow through?

Noticing your own progress keeps motivation going. If something has clicked, hold onto it. If not, that's valuable feedback too.

Keep moving,

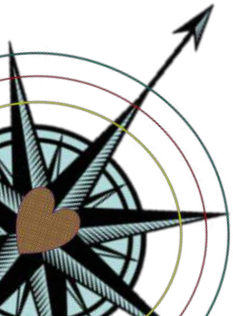
[Your Name]

Day 10 – What's Next? Keeping Momentum

Help clients consider what comes after the first phase. Reinforce self-direction and identify one new step to maintain progress.

Example prompt:

- "What would you like to focus on next?"
- "What's one habit or strategy you want to keep using?"



Example

Subject: Where do you want to go from here?

Hi [Client Name],

You've completed the first 10 days of our coaching together. Now it's time to look ahead. Here are two quick questions to help shape your next step:

- *What's one thing you want to continue doing because it's working?*
- *What's one thing you want to change or try differently?*

This is your process. You get to shape it based on what feels most useful.

Looking forward to what's next,

[Your Name]

Part 2: Disengaged Client Rescue Email Templates

These message templates are designed to support you later in the coaching process when clients begin to disengage or disconnect entirely.

Resistance comes up for most clients after a while. If you notice your client isn't finding time to complete agreed goals, turns up late for appointments or doesn't return their accountability forms, it's likely they've entered that phase.

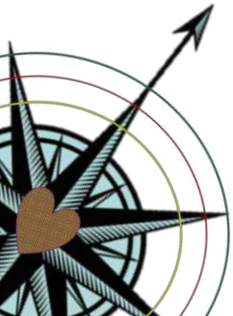
Save these emails for use then. They align with the same tone as the motivation sequence, so the transition feels natural and supportive.

Template 1: The Soft Check-In

For clients who are quiet or slower to respond than usual.

Subject: Checking in

"Hi [Name], I wanted to check in and see how you're doing. No pressure.



I'm curious how things are going and if anything's shifted for you.

I'm here if you want to talk through anything, or if a pause is what you need right now, that's okay too."

Template 2: Accountability Reset

For clients who show up but aren't following through on agreed actions.

Subject: Revisit and Reset

"Hi [Name], I noticed you've had a few gaps between intention and action lately, which is totally normal.

Sometimes it helps to step back and ask: Is the goal still right? Is something getting in the way? I'm happy to revisit the plan together if that's helpful."

Template 3: Let's Restart

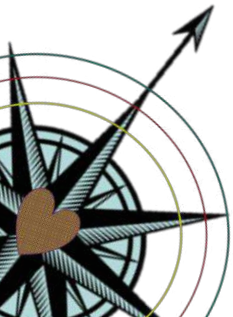
For clients who've gone completely quiet or missed multiple sessions.

Subject: Open Door

"Hi [Name], I know it's been a little while.

I just wanted to say that if you'd like to restart or pick things up again, we absolutely can. There's no need to explain or catch up.

Just let me know what you need, and we'll take it from there."



Template 4: Exit With Grace

When the relationship needs to close with professionalism and kindness.

Subject: Wrapping Up

"Hi [Name],

I haven't heard back from you recently, so I'll assume the timing might not be right for this work right now and that's completely okay.

I've really valued working with you and want to wish you the best with whatever comes next.

You're always welcome to reconnect when the time feels right."

Your Action Plan:

_____

_____

_____

_____

Remember: Business growth is a flow. Strengthen one key, and you strengthen them all.

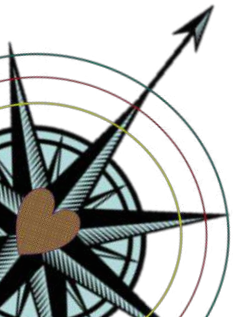
Now it is time...to make it happen!!

What email templates will you use? Get started and set up your automation, track the results and let me know how they impact your business.

It is time to take action on your course and move it forward!!

All the best,

Donna



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