

This is an onboarding sequence I wrote for a SaaS company.

Sequence

1 Confirmation email

2 Benefits email

3 CEO email

4 Create a record

5 Letting agents

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7 550%

C8: Conditional: not created a record

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9 Will upload database

10 Your trial has ended

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#1 Confirmation email - sent immediately

S/L Your Gas Engineer Software trial starts here

Hi {name},

Thanks for signing up for a free 30-day trial of Gas Engineer Software.

Over the next few weeks, we're going to show you how this software will save you hours every week, cut your costs, and increase your revenue.

But first...

Your GES Login Info

To get started with Gas Engineer Software, log in and start creating your first Gas or Oil records.

Your password is: {password}.

To change your password, [log into the web portal with this link](#) and click on your name.

And, if you haven't already, you can download the App which will sync with the web portal.

For iPhone and iPad, [click here](#).

For Android phones and tablets, [click here](#).

If you have any questions, please reply to this email. Alternatively, you can call us on 0207 129 7058 during office hours. We'll be happy to help.

Three ways to get started

Finally, to make things super easy, we've put together these short articles showing how you can get up and running in just a few minutes:

[Getting started with Gas Engineer Software](#)

[Creating your first certificate on the app](#)

[How do I create a job?](#)

All the best,

Tulloch Priest,

Gas Engineer Software Team

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Email #2 - sent the next day

S/L: What to expect from Gas Engineer Software

Hi {name},

I hope you've had the chance to try Gas Engineer Software. If not, you should have received your login information yesterday.

If you didn't get that email, please reply and let me know.

How Gas Engineer Software can help your business

So you might be wondering, how will GES help your business?

Well, with Gas Engineer Software...

- * You and your company will look more professional to your customers.
- * With less paperwork, you will finish your work AT work - freeing you to enjoy your evenings and weekends doing what you love with your family and friends.
- * You'll get more done with fewer people - saving at least 10 hours per engineer each week, AND needing fewer staff in the office.
- * Automatic Service reminders will get you more repeat business without any extra marketing.
- * You'll get more business with Quote/Estimate Reminders. Gas Engineer Software will chase your customers without you having to lift a finger.
- * You'll get paid quicker. Unpaid invoices will be chased with Invoice Reminders.
- * You can also take advantage of accounts integrations that'll save you hours on tax returns and lots of money on accountant fees.

Over the next few weeks, I'll help you experience these benefits for yourself.

But, in the meantime, if you haven't already, why not [log in](#) and try creating your first gas or oil certificate?

All the best,

Tulloch Priest,

Gas Engineer Software Team

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Email #3: CEO email

Subject line: I want to thank you

Hi {name},

I see that you recently signed up for a free trial of Gas Engineer Software and I just wanted to send a quick email thanking you for giving it a try.

Tulloch and I put a lot of work into creating GES - to make it a great all-in-one app for gas engineers.

And even though it's being used by thousands of businesses, we still feel honoured when someone new takes out a trial.

Over the next few weeks, you'll get some emails from us with resources to help you get going and get the most out of Gas Engineer Software. So please watch out for those.

In the meantime, I have a question for you.

We want to make sure we're tailoring our support to your needs.

So what's the biggest issue in your business you would like to solve by using Gas Engineer Software?

Could you please hit reply and let me know?

All the best,

Gamze Priest,
CEO

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Email 04 - would be only sent to users who hadn't yet created a certificate.

Subject line: Let's create your first certificate

Hi {name},

Electronic certificates are probably the biggest game-changer in Gas Engineer Software.

That's because, once you've created a certificate, GES will save the customer details. That means, when it's time to make a follow-up visit, you won't have to re-enter them.

That can save you up to 30 minutes per job.

So to see how easy these certificates are to set up, why not create your first one?

Here are the instructions:

[Creating your first certificate on the app](#)

[How do I create a job?](#)

All the best,

Tulloch Priest,

Gas Engineer Software Team

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Email 05

Subject line: How letting agents choose gas engineers (inside info)

Hi {Name},

Before we created Gas Engineer Software, Gamze and I were letting agents.

In fact, we created Gas Engineer Software BECAUSE we'd been letting agents.

You see, we'd see Gas Engineer firms make the same mistakes over and over... mistakes that were killing their profits. (And making our lives harder, too.)

So we created this software to prevent those mistakes and help make Engineers far more successful.

Let me explain...

The six word sentence that gets you more business

You might be wondering how letting agents pick engineers to do gas safety checks.

Well, that can usually be summed up by these 6 words...

“The squeaky wheel gets the grease.”

You see, letting agencies are constantly being hit up by gas safety inspectors who want our business.

They know that, if they do a half-decent job and their prices are reasonable, they can get a lot of work from a single agency.

But here's the thing...

If you did the inspection last year, and you haven't sent a reminder, the agency has no real motivation to chase you up. It's just as easy to hand it to a rival company that's pitching us for work.

How Gas Engineer Software stops your competitors poaching your clients

That's why one of the key features of Gas Engineer Software is the reminder system.

Two weeks before a safety certificate is about to expire, the software contacts the agent to arrange a new inspection.

That way, you're making the letting agency's life easy... and making sure your competitors aren't poaching your clients!

All the best,

Tulloch Priest,

Gas Engineer Software Team

P.S. The other frustration we had with Gas Engineers was getting hand-written paperwork.

For three reasons...

First, because we would usually have to wait for it. Or, even worse, chase it up.

Second, because we'd then have to scan it and file it. More work for us.

Third, because some engineers have terrible handwriting and we'd have a nightmare trying to decipher it.

In the end, we simply stopped using engineers who brought in paper copies. And we know other firms did the same.

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Email 06

Subject line: It's time to get fancy

Hi {Name},

One way to make your firm stand out and look more professional is to add your logo to your certificates, quotes and invoices.

Fortunately, this only takes 2 minutes to do with Gas Engineer Software.

Check out the instructions here: [Upload your company logo \(1:29\)](#).

All the best,

Tulloch Priest,

Gas Engineer Software Team

PS If you have any problems, let me know. I'll be happy to help.

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Email 7: Wayne grew his turnover by 550%

Hi {name},

In previous emails, we've talked about how Gas Engineer Software can help you grow your business.

So let me tell you about someone who used it to do just that.

His name is Wayne, and he used GES to go from being a sole trader to having a firm of 7 people. And, more importantly, he increased his turnover by 550%.

Wayne's Story

Wayne founded The Boiler Engineer Ltd - a plumbing and heating company - in 1999 near Ashford, Kent.

Like most plumbing and heating companies, they were using paper certificates, records, quotes and invoices. And, like most companies, their paperwork was a nightmare.

Wayne would spend hours most evenings and weekends catching up with it. Invoicing, posting certificates, filing, searching for paperwork, tracking payments, chasing unpaid invoices, sending quotes...

(This story might sound familiar to you.)

The problem

Wayne realised that, if he wanted to work on growing his business, he needed to free up time. And the simplest way to do this would be to automate all this paperwork.

Not only that, but with more and more competitors sending electronic certificates and invoices, his paper versions were looking unprofessional by comparison.

The solution

So he turned to Gas Engineer Software as his all-in-one solution for replacing all that paper.

Suddenly, Wayne could issue quotes, invoices, certificates and records before he even left a job site. His customers loved how professional and efficient it all was.

And, when he made return visits to a site, he didn't have to fill in the customer and address details as the software had already saved them.

Not only that, the software chased all his unpaid invoices with automatic reminders, so he got paid more quickly and didn't have to stress about keeping track of invoices himself.

With all the time he saved, Wayne could focus on growing his business. And, within 7 years, he'd grown from being a sole trader to being the boss of a 7-person firm.

And his turnover had increased by 550%.

Despite that, Wayne is able to spend more time with his family in the evenings and weekends, and enjoys going fishing with his son instead of spending Saturdays catching up with paperwork.

What will your story be?

Now, I can't promise you'll grow your turnover by 550%. And maybe you don't want to grow your firm - maybe you just want more free time to enjoy life?

It's your choice.

Either way, if there are things you'd rather be doing than paperwork, Gas Engineer Software can help.

All the best,

Tulloch Priest

Gas Engineer Software Team

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C8: Conditional: not created a record

This email would go out to anyone who still hasn't created a record. And would be the same as the existing email 04 Create Your First Certificate.pdf

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8 Paperwork

S/L: "Cut my paperwork time by more than half"

Hi {name},

Have you ever added up all the time you - and your team - spend doing paperwork each week?

It's pretty frightening. And, let's be honest, no-one becomes a gas engineer because they're into doing admin.

Which is why Gas Engineer Software earns reviews like these:

Geoff Bailey: "Best software I have used cut my paperwork time by more than half. Just excellent, well done."

Chris Myers: "Not had the usual 'up until 1am sorting out paperwork' sessions since I've been using GES."

Another Chris, Chris O'Neill, wrote "The best app for gas engineers anywhere saves hours of paperwork."

Tots Hynes: "It takes out the pain of paperwork."

Elle4120: "Saves me so much time with paperwork."

Lloyd Barrett: "Definitely cuts down on the paperwork. I have actually got some free time in the evening now."

You can find these reviews - and many more - in the [Appstore](#) or on [Google Play](#).

So, if you'd love to halve your paperwork... for less than £1 per user per day... Gas Engineer Software could be the best investment you make in your business - and your quality of life - this year.

All the best,

Tulloch Priest

Gas Engineer Software Team

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9 Will upload database - these next 2 emails are close to the end of the trial and are intended to close.

S/L Creating records doesn't have to be a drag

Hi {name},

Hopefully, by now, you've taken a few minutes to set up a gas or oil record in Gas Engineer Software.

If so, you'll have seen that it only takes a few minutes. And, once you've done it once for a property, the work's been done.

That's the beauty of the system.

But it gets even better.

If you have a database - even if it's just an excel spreadsheet - we can usually load this into the system for you.

It's a service we offer to anyone who decides to pay for a Gas Engineer Software subscription.

So, if you're enjoying the benefits of the software, but you were dreading adding all your records manually, I just wanted to give you the good news!

All the best,

Tulloch Priest

Gas Engineer Software Team

PS Ready to upgrade to a paid plan? (What's the cta?)

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10 Your trial has ended

S/L Your Gas Engineer Software trial has ended

Hi {name},

Your free trial of Gas Engineer Software has ended.

If you'd like to continue to enjoy the benefits. Benefits like these:

- * You and your company looking more professional to your customers...

- * Less paperwork - freeing you to enjoy your evenings and weekends doing what you love with your family and friends...

* Getting more done with fewer people - saving at least 10 hours per engineer each week, AND needing fewer staff in the office...

* Automatic Service reminders that will get you more repeat business without any extra marketing...

* Getting more business with Quote/Estimate Reminders - and having Gas Engineer Software chasing your customers without you having to lift a finger...

* Getting paid quicker and having unpaid invoices chased with automatic Invoice Reminders...

* Accounts integrations that'll save you hours on tax returns and lots of money on accountant fees...

You'll need to upgrade to a paid plan.

Fortunately, these plans will cost you less than £1 per day per user.

So why not upgrade today?

{CTA Button}

All the best,

Tulloch Priest

Gas Engineer Software Team

P.S. If you have any questions whatsoever, just reply to this email. I'll be happy to answer them.

Or, if you prefer, give me a call on 0207 129 7058 during UK office hours.