

The Warm Introduction Toolkit

Struggling to get responses from cold outreach?

This toolkit gives you five high-performing warm introduction email templates, subject lines, and tips designed specifically for those in professional services who rely on relationship-based business development.

Template 1: Asking a Strong Connection for an Intro



Use This When

You're reaching out to someone you have a strong professional relationship with, a former client, colleague, or trusted partner, who likely won't need much convincing to help.



Also Works For

- Long-time collaborators across departments
- Friendly alumni network connections
- Vendors turned strategic partners



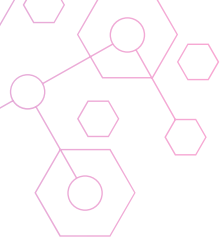
Do's

- **Personalize your ask** based on shared experience or past success together
- **Keep the tone professional**, but approachable



Don'ts

- **Don't assume** the person is comfortable making the intro – always offer a way out
- **Don't forget to follow up** with a thank-you



Template 1: Asking a Strong Connection for an Intro

Subject Line Options:

- Request for a Quick Intro to [First Name] at [Company]
- Would You Be Open to Introducing Me to [Name]?
- Could You Connect Me with [First Name]?
- Intro Request: [Your Name] <> [Prospect's Name]

Copy-and-Paste Version

Hi [Name],

Hope you're doing well. I wanted to ask a quick favor: would you be open to connecting me with [Prospect's Name] at [Company]? I believe there's potential for a productive conversation around [insert reason – e.g., shared client needs, strategic alignment, or recent market shifts or regulations].

To make things easy, I've drafted a short forwardable email below. Of course, if the timing isn't right or you're not comfortable making the intro, no problem at all – just wanted to ask.

Appreciate it either way and hope we get a chance to catch up soon.

Best,
[Your Name]

Alternate Version

(When You're Reaching Out to a Former Client or Partner)

Hi [Name],

I really appreciated the chance to work with you on [brief past engagement]. I'm reaching out because I'm hoping to connect with [Prospect's Name] at [Company] – I saw you're connected and thought you might be open to making an introduction.

There's potential for some alignment between their team and what we've been developing at [Your Firm Name], particularly around [brief reason or opportunity].

To make it easy, I've drafted a short note you can forward. And of course, if it's not the right time or not a strong connection, no worries at all.

Thanks again and let me know how I can be helpful on your end as well.

Best,
[Your Name]

Template 2: Asking an Acquaintance for an Intro



Use This When

You're asking a contact you know professionally but not closely. For example, someone from an event, alumni network or LinkedIn.



Do's

- Be upfront about why you're reaching out
- Keep the tone professional and respectful



Also Works For

- Former clients you haven't spoken to in a while
- Mutual connections introduced at industry events
- Past RFP collaborators/partners



Don'ts

- Don't fake familiarity, instead own the light-touch nature of the relationship
- Don't pressure or follow up aggressively

Subject Line Options:

- Potential Intro to [First + Last Name]?
- Are You Open to Connecting Me with [First Name]?
- Quick Ask - Connection to [Prospect's Name]
- Warm Intro Request - [Prospect's Company]

Copy-and-Paste Version

Hi [Name],

I hope you're doing well. I noticed you're connected with [Prospect's Name] at [Company] and wanted to see if you'd be open to making an introduction.

I believe there's a good opportunity to align on [brief reason or shared interest], and I'd be glad to provide a short message you can forward to make things easier.

Of course, no pressure at all if you'd prefer not to or if the connection isn't that strong – just thought I'd ask.

*Thanks in advance,
[Your Name]*

Alternate Version

(When Reconnecting After a Long Time)

Hi [Name],

I hope you've been keeping well – it's been a while since we last spoke. I was recently looking into [Company] and noticed you're connected with [Prospect's Name], which prompted me to get in touch.

Would you be open to making a quick introduction? I'd be happy to draft a message you can forward.

Totally understand if it's not the right time or the connection isn't close – just wanted to ask.

*All the best,
[Your Name]*

Template 3: Forwardable Email to Send Your Connector



Use This When

You're requesting a warm intro and want to make the connector's job as easy as possible.



Also Works For

- When asking a partner to introduce you to a client contact
- When requesting intros through shared service providers or vendors
- When your contact prefers double opt-in but still wants a draft to forward



Do's

- Keep it under 150 words
- Focus on mutual relevance, not your offering



Don'ts

- Don't include attachments or links
- Don't assume the meeting (offer it)

Subject Line Options:

- Connection Request: [Your Name] from [Firm Name]
- Reaching Out via [Connector's Name]
- Exploring [Topic] - Quick Intro?
- Would You Be Open to Connecting?

Copy-and-Paste Version

Hi [Prospect's Name],

[Connector's Name] mentioned you might be open to a quick introduction. I work with [Firm Name], where we support [brief, relevant value proposition, e.g., "professional services firms preparing for evolving tax frameworks" or "clients working through M&A transitions"].

I'd welcome the chance to connect for 15–20 minutes to learn more about your work at [Company] and see whether there's any overlap – now or down the road.

No urgency at all and happy to defer if timing isn't ideal.

Best,
[Your Name]
[Title, Firm Name]
[LinkedIn / contact info]

Alternate Version

(For Senior Execs or High-Gate Prospects)

Hi [Prospect's Name],

[Connector's Name] suggested you might be open to a quick intro. I'll keep this brief – I'm with [Firm Name], where we work with senior decision-makers navigating [topic].

If a short call is appropriate, I'd love to connect. Totally fine if it's not a fit or timing's off.

Best,
[Your Name]
[Title, Firm Name]
[LinkedIn / contact info]

Template 4: Following Up After the Introduction Is Made



Use This When

Someone has introduced you to a prospect and you want to acknowledge the gesture, regardless of the outcome.



Also Works For

- When you've had a great call and want to loop back
- When you're hoping to build long-term reciprocity
- When the prospect hasn't responded but the intro was still valuable



Do's

- Always thank the connector, regardless of outcome
- Offer value back, even loosely ("Let me know how I can help")



Don'ts

- Don't ghost the connector, regardless of outcome
- Don't turn the thank-you into another ask

Subject Line Options:

- Thanks for the Intro to [Prospect's Name]
- Thanks for the Intro—[Prospect's Name] and I Are Connecting
- Just Followed Up with [Prospect's Name]—Thanks Again!
- Appreciate the Connection
- Grateful for the Intro

Copy-and-Paste Version

Hi [Name],

Thank you again for the introduction to [Prospect's Name]. I've reached out and will keep you posted on how things unfold.

I really appreciate you taking the time. If there's ever anything I can assist with on your side – a connection, perspective, or second set of eyes – don't hesitate to reach out.

Best,
[Your Name]

Alternate Version

(When The Prospect Has Already Replied/Scheduled)

Hi [Name],

Thanks again for putting me in touch with [Prospect's Name] – we've connected and have a meeting lined up.

I really appreciate you making the introduction. If there's ever someone in my network I can connect you with, I'd be more than happy to return the favour.

Warm regards,
[Your Name]

Template 5: Double Opt-In Intro

Template for Your Connector



Use This When

You're sending a draft your connector can use to check with the prospect before introducing you.



Also Works For

- Sensitive intros where hierarchy or politics may be in play
- Situations where the connector doesn't know the prospect well
- When the connector is senior and wants to tread carefully



Do's

- Be neutral and give the prospect full agency
- Keep it short and low-pressure



Don'ts

- Don't pre-sell the person too aggressively
- Don't CC the requester before getting consent

Subject Line Options:

- Someone I Know Is Interested in Connecting – Okay to Share?
- Open to a Quick Intro Request?
- Quick Check – Intro to [Your Name]?
- Would You Be Open to an Intro?
- Intro Request (Optional)

Copy-and-Paste Version

Hi [Prospect's Name],

Someone in my network, [Name], asked if I might introduce you. They work with [Firm Name] and thought there could be some potential overlap between your work and theirs, especially around [brief context]. No pressure at all – happy to make the connection if you're open to it. Just let me know and I'll pass along their note.

*All the best,
[Connector's Name]*

Alternate Version

(For More Formal or Reserved Context)

Hi [Prospect's Name],

I've been asked to introduce you to someone in my network, [Name], who's doing work in [topic]. They're with [Firm Name], and I thought there might be a useful exchange if you're open to it.

If not, no problem at all – just wanted to check before sharing your contact details.

*Thanks,
[Connector's Name]*