SAMPLE PROJECT · FICTIONAL BUSINESSES

READY-TO-USE CLIENT COMMUNICATION

Client Email Templates

10 templates for small service businesses, each with an email and a short text-message version

Small business owners lose time writing the same messages over and over: reminders, follow-ups, document requests, and payment notes. These templates are written to be **clear, friendly, and short**, so clients understand them in one read and know exactly what to do next.

The examples use three fictional businesses: **Maple & Main Tax Services** (tax preparation), **Bright Path Plumbing** (home services), and **Greenleaf Property Management** (rentals). Each template is easy to adapt to any industry.

How I write client messages

- One clear purpose per message
- The action the client needs to take, stated plainly
- Dates, times, and links in the body, not buried at the end
- A warm, professional tone that matches the business
- Highlighted text = details filled in for each client

What's inside

#	Template	When to send	Example business
1	Reply to a new inquiry	Within 1 business hour of an inquiry	Bright Path Plumbing
2	Appointment confirmation	Right after booking	Maple & Main Tax Services
3	Appointment reminder	24 hours before	Maple & Main Tax Services
4	Missed appointment / reschedule	Same day as the missed appointment	Maple & Main Tax Services
5	Request for missing documents	When a file is incomplete	Maple & Main Tax Services
6	Second reminder for documents	3–4 days after the first request	Maple & Main Tax Services
7	Quote follow-up	3 days after sending a quote	Bright Path Plumbing
8	Friendly payment reminder	On the due date	Greenleaf Property Management
9	Maintenance request received	Within 1 hour of a tenant request	Greenleaf Property Management
10	Review request	1–2 days after a finished job	Bright Path Plumbing

1 Reply to a new inquiry

Bright Path Plumbing — Win the job

When: within 1 business hour. In home services, the business that replies first often gets the job.

Subject: Thanks for contacting Bright Path Plumbing – next steps

Hi **Daniel**,

Thank you for reaching out about the **leaking kitchen sink**. We'd be happy to help.

We have openings on **Thursday, March 12 between 9 and 11 AM** or **Friday, March 13 between 1 and 3 PM**. Just reply with the time that works best, and we'll confirm right away.

If water is spreading or you can't turn it off, please call us at **(555) 010-2244** for same-day help.

Best regards,
Hud, on behalf of Bright Path Plumbing

TEXT

Hi Daniel, thanks for contacting Bright Path Plumbing! We can come Thu 3/12, 9–11 AM or Fri 3/13, 1–3 PM. Which works for you? For urgent leaks, call (555) 010-2244.

2 Appointment confirmation

Maple & Main Tax Services — Fewer no-shows

When: right after the client books.

Subject: Your tax appointment is confirmed – Tuesday, February 10 at 2:00 PM

Hi **Maria**,

Your appointment with **Ana Reyes** is confirmed for **Tuesday, February 10 at 2:00 PM** at our office, **42 Maple Avenue, Queens, NY**.

To make the most of your visit, please bring: your **W-2s and 1099s**, last year's tax return, and a photo ID. If you'd rather send documents ahead of time, you can upload them here: **secure upload link**.

Need to change the time? Just reply to this email or call **(555) 010-7788**.

See you soon,
Maple & Main Tax Services

TEXT

Hi Maria, your tax appointment is confirmed for Tue 2/10 at 2:00 PM at 42 Maple Ave. Please bring your W-2s, 1099s, last year's return, and photo ID. Reply here to reschedule.

3 Appointment reminder

Maple & Main Tax Services · Fewer no-shows

When: 24 hours before the appointment.

Subject: Reminder: your appointment is tomorrow at 2:00 PM

Hi **Maria**,

This is a friendly reminder that your tax appointment is **tomorrow, February 10 at 2:00 PM**.

Please remember to bring your **W-2s, 1099s, last year's return, and photo ID**. If something has come up, just reply and we'll find a new time.

Thank you,
Maple & Main Tax Services

TEXT

Reminder: your appointment at Maple & Main Tax is tomorrow, 2/10 at 2:00 PM. Please bring your tax documents and ID. Reply C to confirm or R to reschedule.

4 Missed appointment / reschedule

Maple & Main Tax Services · Keep the client

When: the same day. Keep it kind: the goal is to rebook, not to blame.

Subject: We missed you today – let's find a new time

Hi **James**,

We missed you at your appointment today at **10:00 AM**. No worries, we know things come up.

Here are a few open times this week: **Wednesday at 11:00 AM, Thursday at 3:30 PM, or Friday at 9:00 AM**. Just reply with the one that works for you.

With the **April 15** deadline coming, booking soon will give us enough time to prepare your return carefully.

Best,
Maple & Main Tax Services

TEXT

Hi James, we missed you today, no worries! Open times: Wed 11 AM, Thu 3:30 PM, or Fri 9 AM. Reply with one and we'll book it for you.

5 Request for missing documents

Maple & Main Tax Services · Get files complete

When: as soon as a file is found to be incomplete. List exactly what's missing.

Subject: 2 documents needed to finish your tax return

Hi Lin,

Thank you for sending your documents. We're almost ready to prepare your return. We just need these 2 items:

1. Form 1098 – mortgage interest statement (usually sent by your lender in January)
2. Childcare provider receipts for 2026

You can upload them here: secure upload link, or reply with clear photos. Please don't send Social Security numbers by regular email.

Once we have them, we'll finish your return within 3 business days.

Thank you,
Maple & Main Tax Services

TEXT

Hi Lin, we're almost done with your return! We still need: (1) Form 1098 from your lender, (2) 2026 childcare receipts. Upload here: [link]. Thanks!

6 Second reminder for documents

Maple & Main Tax Services · Polite follow-up

When: 3–4 days after the first request, if nothing has arrived. Reply in the same email thread.

Subject: Re: 2 documents needed to finish your tax return

Hi Lin,

Just checking in on the Form 1098 and childcare receipts. If you're having trouble finding the 1098, your lender's website usually has it under "Tax Documents," or I'm happy to help you look.

We'd love to file well before the April 15 deadline. Thank you!

Best,
Maple & Main Tax Services

7 Quote follow-up

Bright Path Plumbing · Win the job

When: 3 days after sending a quote with no reply.

Subject: Your water heater replacement quote

Hi Mr. Ortiz,

I wanted to follow up on the quote we sent on Monday for replacing your 40-gallon water heater ($1,450, including installation and removal of the old unit).

Do you have any questions I can answer? If you'd like to go ahead, we can schedule the installation as early as this Friday.

Best regards,
Bright Path Plumbing

TEXT

Hi Mr. Ortiz, following up on your water heater quote ($1,450 installed). Any questions? We can install as early as Friday. Just reply here!

8 Friendly payment reminder

Greenleaf Property Management · Get paid on time

When: on the due date. Friendly and factual: give the amount, the date, and how to pay.

Subject: Rent reminder – Unit 3B, due March 1

Hi Grace,

This is a friendly reminder that rent for Unit 3B ($1,850) is due today, March 1.

You can pay through the tenant portal. If you've already paid, thank you, and please ignore this message. If you need to talk about a payment plan, just reply and we'll work something out together.

Thank you,
Greenleaf Property Management

TEXT

Hi Grace, friendly reminder: rent for Unit 3B ($1,850) is due today, 3/1. Pay through the tenant portal. Already paid? Thank you, please ignore this!

9 Maintenance request received

Greenleaf Property Management · Happy tenants

When: within 1 hour of a tenant's request, even before a repair is scheduled.

Subject: We received your maintenance request # 1042

Hi Tom,

Thanks for letting us know about the heater not working in Unit 5A. Your request number is #1042.

We've contacted our technician and will confirm a visit time by 5:00 PM today. If the problem gets worse or becomes an emergency, please call (555) 010-3300 right away.

Thank you for your patience,
Greenleaf Property Management

10 Review request

Bright Path Plumbing · More 5-star reviews

When: 1–2 days after a finished job, while the experience is fresh. Make it one click.

Subject: How did we do, Daniel?

Hi **Daniel**,

Thank you for choosing Bright Path Plumbing for your **kitchen sink repair**. We hope everything is working perfectly.

If you were happy with our work, would you take 30 seconds to leave us a review? It really helps a small local business like ours: **Google review link**.

And if anything isn't right, please reply to this email. We'll make it right.

Thank you again,
Bright Path Plumbing

TEXT

Hi Daniel, thanks for choosing Bright Path Plumbing! If you were happy with your sink repair, a quick review would mean a lot: [link]. Anything not right? Just reply.

Tips for using these templates

- **Personalize every message.** Fill in the client's name and the exact details. A template should never look like a template.
- **Save them where you work.** Gmail templates, your CRM, booking software, or text-message tools can store these for one-click sending.
- **Set reminders for follow-ups.** Pair templates 5 and 6, and 7, with a tracker so no client is forgotten.
- **Protect client privacy.** Never ask for Social Security numbers, bank details, or passwords by regular email or text.
- **Match the business's voice.** A law office may want a more formal tone; a cleaning company can be warmer and more casual.

About this sample. This is a sample project for my portfolio. All businesses, names, phone numbers, addresses, and prices are fictional. As your VA, I can adapt these templates to your business's voice, set them up in your email or booking tools, and send them for you every day.

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