



## Bridge to the Marketing Team

When you're ready to connect the customer with their Marketing Services account manager, give them a quick heads-up so the introduction feels intentional and valuable. This keeps the customer informed, reinforces the benefit of the consult, and ensures a smoother transition to the Marketing Services team.

## Handoff Email Template

### Subject

Intro: Marketing Assessment for (CUSTOMER'S COMPANY)

### CC

{Marketing Rep Email}

Hi {First Name},

Good talking earlier. As promised, I'm introducing you to {Marketing Rep Name}, our quick lube marketing specialist who works with ISI shops. I've cc'd {Rep First Name} here.

What you'll get: a free 30 minute Marketing Assessment focused on your market and services. We'll review your website, Google profile/Maps, SEO, ads, reviews, and reminder strategy—then translate findings into booked visits and ticket growth.

**{Marketing Rep Name}** will be reaching out with next steps and feel free to reply with any notes that you would like us to know about your current marketing state or goals.

Thanks,