Logo

Description automatically generated

Email, Phone, Linkedin & Follow Up Scripts

**INITIAL EMAIL**

After you talk to a company contact you can use this template when you email them:

First Name,

Thank you for taking the time to speak with me today.

(Pick one of the two following sentences)

(Option 1) Per our conversation, please find attached a sell sheet of (Product Name) for your review.

(Option 2) Here is a link to view a video showing the benefits of (Product Name): Insert link to unlisted Youtube video

If you have any questions, please let me know. I am looking to license this product to your company.

I look forward to hearing from you soon.

Kindest Regards,

Bob Smith

Bob Smith Design

555-555-5555

[bobsmithdesign@gmail.com](mailto:bobsmithdesign@gmail.com)

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**FOLLOWING UP**

If you haven't watched the video on getting in and following up yet, you can view it under Step 8 in the 10 Step Guide.

You can view the templates here or download the templates to your computer using the link below.

[http://www.inventRight.com/docs/Follow Up Phone Script AND Email Templates.rtf](http://www.inventright.com/docs/Follow%20Up%20Phone%20Script%20AND%20Email%20Templates.rtf)

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**OVERVIEW**

OK, so you've gotten your sell sheet and/or video into a potential licensee.

Now, how do you follow up???

Follow the instructions below and realize that you may need to send the same email many times and call before they reply.

Also, realize that getting a "No" is not a bad thing. "No's" allow you to not waste your time with companies that aren't interested in a particular idea.

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**STEP #1 FOR FOLLOWING UP**

**INSTRUCTIONS - FOLOW UP VOICE MAIL**

Use this phone script when making your first follow up call to a potential licensee 7 to 10 days after you've submitted your sell sheet.

Replace underlined parts with your text.

If you get their voice mail, which you will most of the time, simply use the script below. If they happened to pick up, just acknowledge that you know they are busy and ask if you can send your sell sheet again.

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**VOICE MAIL SCRIPT**

Hello, my name is Andrew Krauss.

I’m with Andrew Krauss designs.

I sent you a sell sheet and video for my BBQ Spatula about a week ago.

If you think the product would be a good match for your product line, please reply to my email or give me a call.

I’m looking to license this product to your company.

If you don’t think the product would be a good match for your product line, simply reply to my email saying “not a right match”.

I’m going to drop you an email right now with another copy of my sell sheet attached so it’s at the top of your inbox.

Thank you for taking the time to take a quick look at my BBQ Spatula product and email me back.

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**INSTRUCTIONS - FOLLOW UP EMAIL #1**

After using the voice mail script and leaving a voice mail, send this email template the second you get off the phone.

Replace underlined parts with your text.

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**EMAIL TEMPLATE #1**

Subject Line: RE: BBQ Spatula Product Submission

Hello Bob,

Thank you for taking my call on October 2nd and thank you for agreeing to look at the sell sheet for my BBQ Spatula product.

I just left you a voice mail to follow up on the email I sent you on October 2nd.

I know you are busy, so I have attached a sell sheet for the BBQ Spatula to this email.  (Optional: There is also a link to a product video in the sell sheet that I think you will find helpful.) The sell sheet attached will help you quickly understand my product.

I’m looking to license this product to your company.

If you don’t think this product is a right match for your product line, simple reply to this email with “Not A Right Match”.

However, if you think this product might be a right match or if you have questions, drop me an email or give me a call.

Kindest Regards,

Bob Smith

Product Developer

Smith Designs

505-555-5555

[bob@smithdesigns.com](mailto:bob@smithdesigns.com)

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**INSTRUCTIONS**

Send (email #2) below 7 to 10 days after sending (email #1) above. Continue to send this (email #2) every seven to ten days and leave the voice mail above one more time after about four weeks from your initial voice mail. Don't hesitate to send this email every week for up to three months.

In this email and all following emails, bold the following lines below.

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**EMAIL TEMPLATE #2**

Subject Line: RE: BBQ Spatula Product Submission

Hello Bob,

**Thank you for taking my call on October 2nd**and thank you for agreeing to look at the sell sheet for my BBQ Spatula product.

 I know you are busy, so I have **attached a sell sheet for the BBQ Spatula** to this email.

(Optional: There is also a link to a product video in the sell sheet that I think you will find helpful.)

The sell sheet attached will help you quickly understand my product.

I’m looking to license this product to your company.

**If you don’t think this product is a right match for your product line, simply reply to this email with “Not A Right Match”.**

However, if you think this product might be a right match or if you have questions, drop me an email or give me a call.

Kindest Regards,

Bob Smith

Product Developer

Smith Designs

505-555-5555

[bob@smithdesigns.com](mailto:bob@smithdesigns.com)

***LinkedIn & Facebook Message Scripts***

Coach Ryan Diez has put together a highly-detailed, exhaustive list of his best tips about how to use LinkedIn to get in to potential licensees. In his words? "I think LinkedIn is the single best and most consistently successful way to get in to companies." He describes the exact words he uses as well as best practices.

Below are the script examples from the presentation.

**Subject:** Greetings Mr.\_\_\_\_\_ question re: \_\_\_\_\_\_\_\_ Open Innovation?

"Good Morning Mr. \_\_\_\_\_\_,   
My name is \_\_\_\_\_. I am a product developer from \_\_\_\_\_\_\_\_\_\_\_\_. I have developed a patent pending \_\_\_\_\_\_\_\_\_\_ which I believe would be an absolute perfect fit in the \_\_\_\_\_\_\_\_ line. Obviously your company is on the forefront of innovation in the cooling category so I was hoping \_\_\_\_\_\_\_\_ would be open to outside submissions.  If so, I have a sell sheet which will quickly highlight the benefits of this product to your company. Please let me know whom I may send more information to… perhaps that persons is you?

Thank you for your time,  
Ryan Diez"

**Subject:** \_\_\_\_\_\_\_\_\_ Open Innovation?

"Good Morning Ms. \_\_\_\_\_\_,   
My name is \_\_\_\_\_\_\_, I am a product developer from Los Angeles, CA. Is \_\_\_\_\_\_\_\_\_\_ on board with Open Innovation? I have developed an extremely unique yet simple \_\_\_\_\_\_\_ product which I believe would benefit \_\_\_\_\_\_\_\_\_\_\_ and fit wonderfully in your product line. Are you or somebody within available to review my material?

Hope all is well,   
Ryan Diez"

***Coach Terry’s Message & Email Scripts***

***Phone:*** (First, I’ll have researched who I want to speak to in the company Ex. Bob Smith in Marketing, Joann Black in Sales etc.)

**Receptionist:** Hello, XYZ Company

**ME:** Hello, will you connect me with Bob Smith in the marketing department please?

**Receptionist:** (one of two possibilities occurs)

1. Sure please hold…
2. May I ask what this is in reference to? **OR** May I tell him who’s calling?

**ME:** Sure, This is Terry O’Mara and I’m a product developer, and I understand that Bob is the person I need to speak to regarding submissions. Can you connect me please?

**Receptionist:** (one of two possibilities occurs)

1. Sure please hold…
2. Bob’s not in, will his voice mail be OK? **OR** Bob’s not it, can I give him a message?

**Transfer occurs:** (one of two possibilities occurs)

1. Hello Bob Smith…
2. Voice message box

**ME:** Hi Bob, This is Terry O’Mara and I’m a product developer and I have a patent pending product that (include your one sentence benefit statement) And that may be a great fit for your existing product line. Bob, can you tell me if (company name) is accepting of open innovations (or outside product submissions)?

YES, great! I have a professional sell sheet that will quickly explain the product and the benefits to your company and consumers. Can I send it to you to evaluate?

***Email or Social Media*** (LinkedIn/Facebook):

**Subject:** Accepting Open Innovation?

Hi\_\_\_\_\_\_\_\_\_(Name)

My name is \_\_\_\_\_\_\_, I am a product developer and I would like to know if \_\_\_\_\_\_\_\_\_(company) is accepting of new product ideas?

Thank you,

Terry

That said, I highly suggest you watch this video which takes an even simpler approach and the women doing it is VERY good at getting in. <http://www.inventright.com/training-alias/recent-webinars>

**Tips Scripts Strategies when making calls – Coach Paul Sorenson**

Find company number on contact section of website or on Hoover or on google search, corporate directory, etc.

When you get gatekeeper:

**Script #1**

Hello, I’m a product developer and I would like to submit a new product to your company. Can you direct me to the person who handles outside submissions?

You’ll get 1 of 4 responses.

1. We don’t take outside submissions. (cross them off your list)
2. They will not know where to send you. (Ask for someone in sales. The sales department more often answers the phone) When you get that person on the phone revert back to (script #1) the same script that you used on the gate keeper. If they respond that they are the person who handles outside submissions go to script #2. If they still are not the right person ask for someone in marketing. Keep doing this until you get the appropriate person.
3. We only accept outside submissions via our online submission portal. (ask for the website and who reviews online submissions)
4. They will send you to the appropriate person. (Be sure to ask the first and last name of the person you are being sent to). If you get a voice mail do not leave a message. Keep calling at different times and different days until you are successful in reaching them. If you leave a message, #1 rarely will they call you back and #2 it is less appropriate to continue calling. Just keep calling until you finally get the individual to answer.

If you get a name of the individual who handles outside submissions (#4) or the name of the individual who reviews submissions from their online portal (#3) connect with them and 8 other people in their company on Linkedin. This way you are building a virtual presence in their company. (being connected to multiple people)

Watch for this individual (not the other 8 people you tried to connect with) to accept your connection request. When they do, send them a reply saying, “Thank you for the connection, I am a product developer and I submitted a product via your online submission form on (put date you submitted). I have developed a product that, (insert your one sentence benefit statement), I look forward to talking with your soon.

Or

If you receive a connection acceptance from the person who handles outside submissions and you have not yet talked with them on the phone, send them the following reply. “Thank you for the connection. I am a product developer and I have been trying to reach you at your office to submit a new product to your company. I’ve developed a product that (insert one sentence benefit statement). I look forward to speaking with you soon.

I do not like to ask them to respond via Linkedin. If they voluntarily do that is great but we are trying to follow their submission process whether that be an online format or via phone. The reason for the Linkedin message is to get on their radar and hopefully they will look it up or be a little more familiar with you when you do get through. In some cases they will request info from you via Linkedin but make sure that they are the ones who initiate that.

When you finally do get ahold of the appropriate person use this brief simple script.

**Script #2**

“Thank you for your time, I have developed a product that (insert your one sentence benefit statement) can I send you a one page sell sheet?”

Company guy: Sure

You: Great, what is a good email to send that to?

Type their email in the address line in your email, then read it back to them to ensure that you heard them correctly.

Prior to making these calls I always open my email and start an email as follows;

Hello,

Thank you for your time today. Attached is the sell sheet you requested.

Thank you!

In subject line I put: Sell Sheet from Paul Sorenson

I also have my sell sheet attached to the email

After they have confirmed the correct email address I hit send then ALWAYS ask,

YOU: When would you like me to follow up with you?

This way #1 they know and are expecting you to follow up, #2 You know when THEY want you to follow up. You are not left guessing if you should follow up in a week, 2 weeks, 3 weeks, etc.

Sometimes prior to hanging up, I will ask them if they would mind checking their email to make sure that it did not get hung up in their spam folder or that I inadvertently typed the wrong email address.

Once in a while they will open the email at that time and engage in conversation with you. Do not ask them to open it. Be respectful of their time and schedule. If they do open it be prepared to briefly talk about your product and answer questions.