

Chad's Follow-Up Email SOP

THANK YOU · TWO DEMO LINKS · ASK FOR A MENU

Buddy's broker calls are rapid-fire pitches. He does most of the talking. The follow-up email should reflect that: short, warm, and focused on ONE micro-commitment that turns the second call into a live demo.

THE GOAL: Get them to reply with a PDF menu from one of their listings. That's it. Once they send a menu, we book the second call and load it into Menu Analyzer LIVE. They see a restaurant get set up in under two minutes. That's when the partnership becomes obvious.

The Motion

This is the exact sequence. Do not deviate.

Step 1 · Call 1 · The Rapid-Fire Pitch

Buddy pitches. Broker listens. Broker gives a general impression — interested / not interested. Buddy books the second call if warm.

Step 2 · Follow-Up Email (this SOP, sent within 60 minutes of Call 1)

Thank them. Two demo links. Ask for a PDF menu from one of their listings. Suggest a specific window for Call 2.

Step 3 · Broker Sends The Menu (24–48 hours ideal)

This is the whole point of the follow-up. The moment they reply with a menu attached, we know they're real.

Step 4 · Call 2 · Live Menu Analyzer Demo

Buddy loads their client's menu into Menu Analyzer while they watch. Recipe IP populates. PlateCost lights up. Order Guide maps. They see how fast a restaurant gets live.

Step 5 · Referral Partnership Agreement

By the end of Call 2, they either sign the referral agreement or ask for a third call to loop in the seller. Either way — the menu upload was the wedge.

Why the PDF menu ask works: It's a 30-second micro-commitment. Zero cost, zero risk. But once they send it, they're invested. And when they see their client's menu populate Recipe IP live on Call 2, the referral partnership becomes obvious — not a leap.

The 3-Block Email Structure

Every follow-up email follows this exact 3-block structure. Do not add blocks. Do not remove blocks.

BLOCK 1 · THE OPENING (1 SHORT LINE)

One warm, honest thank-you. Do NOT fake specificity about what they said. Buddy is not walking out of a rapid-fire pitch with 5 quotable moments. Fake specificity is worse than no specificity — brokers can smell it.

Use one of these openings verbatim:

"Thanks for the time today. Two quick things:"

"Thanks for the time this [morning/afternoon]. Two quick items:"

"Appreciate the time. Two things:"

NEVER reference the length of the call. Never write "thanks for the fifteen minutes" or "appreciate the twenty minutes" — sometimes the call runs long, sometimes short. Referencing time creates awkwardness if the actual call was different. "Thanks for the time" works whether it was ten minutes or an hour.

BLOCK 2 · THE TWO DEMO LINKS

Send them BOTH sides of the demo site. The broker presentation is what they share with their clients. The restaurant pitch is what a chef-owner sees. Both live on the same site — they just show different angles of the same product.

The demo site — everything in one place:

- plateprepdemo.com/brokers — the broker presentation. This is what you'd share with your sellers to explain why you're recommending PlatePrep. Includes the two-minute videos.
- plateprepdemo.com/product — the restaurant-facing pitch with pricing. This is what a chef-owner sees when they land on PlatePrep. Same site — different angle.

BLOCK 3 · THE MENU ASK + NEXT CALL

This is the whole point of the email. Ask for a PDF menu from any one of their listings. Frame it as low-effort. Explain why we want it — to load into Menu Analyzer live on the next call. That's the payoff.

One ask before our next call:

Send me a PDF of the menu from any one of your current listings. Doesn't have to be your favorite deal — just one where the seller has a decent menu we can work with.

On our second call I'll load it live into Menu Analyzer while you watch. In under two minutes you'll see the entire menu populate Recipe IP with costed ingredients, portions, and PlateCost per plate. That's what a seller hands the buyer instead of a shoebox of receipts.

Once you see how fast we can get a restaurant live, the referral partnership is a much easier conversation.

Reply with the menu and I'll send a calendar invite for [DAY] the [DATE].

The Full Email Template (Copy-Paste)

Paste this into Gmail, replace the [BRACKETED] fields, and send. Cc chad@plateprepdemo.com every single time so the team has visibility.

Subject line options (pick one):

- Thanks for the time — two links + a quick ask
- Follow-up from our call — demo links + menu request
- Two links + a menu ask before our next call

[FIRST_NAME],

Thanks for the time today. Two quick things:

The demo site — everything in one place:

- plateprepdemo.com/brokers — the broker presentation. This is what you'd share with your sellers to explain why you're recommending PlatePrep. Includes the two-minute videos.
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Reply with the menu and I'll send a calendar invite for [DAY] the [DATE].

Have a great service.

Buddy Foy Jr.
Co-Founder, PlatePrep
The Chateau on the Lake · Bolton Landing, NY
201-206-8442
plateprepdemo.com/brokers

Why No Fake Callback Lines

Buddy's broker calls are rapid-fire fifteen-minute pitches. Buddy talks; the broker gives him a general impression — interested, skeptical, warm, cold. Buddy is NOT walking out with five specific quotes he can hand you to weave into a follow-up. Fake specificity from a rapid-fire pitch is a smell brokers catch every time.

The email reads like a natural continuation of the call: "here's the demo, send me a menu, let's talk again." Short. Warm. Honest. The menu ask does all the work.

THE RULE: Unless Buddy specifically texts you a callback line to use, keep the opening warm and generic. "Thanks for the time today" beats "Impressed with how you're building your Maryland pipeline" every time — because the first is honest and the second is guessing.

Bump Templates (No Reply After 3 Days)

If they don't send a menu in 3 business days, send ONE bump. Never more than one. The bump doubles down on the menu ask — don't reintroduce the whole pitch.

BUMP OPTION A · THE SHORT NUDGE

Subject: Re: [ORIGINAL SUBJECT]

[FIRST_NAME],

Quick nudge on my note from [DAY]. Any PDF menu from your book works — doesn't have to be your best listing, just one we can load into Menu Analyzer live on the next call.

If PlatePrep isn't right for your book, just tell me and I'll stop bugging you.

Have a great service.

Chad

BUMP OPTION B · THE SPECIFIC LISTING

Subject: Re: [ORIGINAL SUBJECT]

[FIRST_NAME],

Following up. Saw [LISTING NAME] on your book — that's the kind of chef-owner concept where a live Menu Analyzer walkthrough would land. Any chance you can grab the PDF menu and forward it over?

Two-minute payoff on the next call.

Have a great service.

Chad

Pre-Send QA Checklist

Walk this checklist before hitting send on any follow-up.

Subject line references the call or the menu ask — never generic "Following up"

Opening is warm and generic — NOT fake-specific unless Buddy flagged a callback line

NEVER references the length of the call (no "fifteen minutes", no "twenty minutes")

Both demo links included: /brokers AND /product

The menu ask is stated clearly — "PDF of the menu from any one of your current listings"

The payoff is explained — live Menu Analyzer on Call 2, under two minutes

Specific next-call window offered (day AND date)

Signed Buddy Foy Jr., Co-Founder — NEVER "Founder"

"PlatePrep" — one word, never "Plate Prep"

"Have a great service." sign-off

Cc chad@plateprepdemo.com so team has visibility

Never mention Performance Food Group by name — use "our distribution partner"

Prices spelled out if quoted: "two hundred and ninety-nine dollars a month", not "\$299"

Why This Follow-Up Works

Three things make this email convert. Every follow-up you send must preserve all three:

1. It's Short.

Under 150 words in the body. Brokers get dozens of follow-ups a day. Short wins.

2. It Asks For Something Tiny.

A PDF menu takes them 30 seconds. It's zero risk, zero cost, zero commitment. But once they send it, they're invested in seeing what we do with it.

3. It Promises a Live Payoff.

The second call isn't "another pitch" — it's a live demo on THEIR client's menu. That's a reason to show up. Buddy loads the menu, they watch it populate. That's when the referral partnership stops being abstract.

Your job as the sender: Get the menu. Nothing else matters. Once we have a menu, we control the second call. Once we control the second call, the referral partnership is a live demo away.