Sample email to Decision-Makers/Executive asking for meeting to present Knowledge Transfer program

*This document provides sample language for an email asking executives for a meeting to present or discuss The Steve Trautman Co.’s Knowledge Transfer Solution. Be sure to replace highlighted items with your customized text.*

*Here are the links to the documents mentioned below:*

* + - [Our one-page brochure](http://stevetrautman.com/wp-content/uploads/2012/02/Steve-Trautman-Company-Knowledge-Transfer-Solution.pdf)
    - [Our white paper: “Knowledge Transfer: Preserving Your Secret Sauce”](http://stevetrautman.com/wp-content/uploads/2012/09/Knowledge-Transfer-Preserving-Your-Secret-Sauce.pdf) (with 2-page executive summary)

Hello INSERT NAME,

I am writing to suggest a meeting with an expert in knowledge transfer, Steve Trautman.  I think his ideas would be particularly relevant at COMPANY because of our (PICK ALL THAT APPLY:  aging worker, onboarding, outsourcing, consistency, reorganization, new system) issues.   I would like to set up 30-60 minutes of your time to have Steve talk thru his approach to retaining and cross-training more than 90% of our unique knowledge and “secret sauce.”

Steve’s company has a quick and clear way to 1) assess the bench strength of specific teams,  2) plan a detailed set of tasks to methodically  transfer knowledge, and 3) teach experts (mentors) and apprentices how to follow the process in a logical, rapid way that was specifically designed for engineers, scientists and other technical experts.  I’ve attached a one-page PDF fact sheet that lays this out, as well as Steve’s white paper [please attach – see links above] that gets to his core thoughts on how to preserve your secret sauce within an organization.  You can also visit is website at [www.stevetrautman.com](http://www.stevetrautman.com).

I’m in discussion with Steve’s firm right now.  Are you available the end of next week for a phone meeting where we can take the time to walk through a possible solution for COMPANY?  Say, Friday Feb 8th at 10am Pacific time?  (If that time doesn’t work, please feel free to suggest an alternative).

Best regards,

INSERT NAME