**Future Adilas Business Model Planning – Where are we headed?**

Steve has had the idea of putting Adilas into a trust for many years. We would like to advance that ball forward. We are interested in hearing some of your ideas and input on creating a plan for moving in that direction.

1. How big do we want to get?

**Steve:** As small as possible. This is a question of Resources (People/Time/Money) and Revenue (adilas Income). A Balance. Keep the team (Founders) as small as possible and maximize personal income. This is the true nature of business. So the question then becomes how much income does each person desire? Monthly and Retirement. Inflation? How far in Perpetuity? We need to know how much Revenue we desire and how many people we need to reach this.

**Alan:** I would like to stay small. I think my preference would be to stay serving smaller businesses, (mom & pop shops). I think we would need to bring on lots of new systems, but feel like we would only need to have a few more pieces to our current team to make it work. I feel like if we keep going after and getting bigger, public, companies then we would need to get more developer and customer service help to keep up with the demand of having an enterprise level service.

I think no matter what we could use 1 more server guy to help Wayne out and we could probably use 1-2 more developers to help with bugs, tests, and Metrc stuff. I think if we are serious about trying to sell more systems we will need to invest in marketing and sales.

**Bryan:** We want to provide the best service to as many people as possible.

If we have a great model it can serve everyone.

**Chuck:** Personally, I would say not to much bigger. I personally enjoy working for smaller companies as I feel more connected to the company, its members and I like feeling that my opinion matters.

Also, I hate how big companies seem to get bogged down by bureaucracy and the good old boys club.

Lastly, I also like companies that run light and profitable instead of bloated. It’s still important to have enough people to do the job but we shouldn’t have too many people.

**Cory:** (Funny when I read this I was thinking about the software and database functionality and not about the size of organization aka people.) As for group of people I think as small as we can be. If we can work together, communicate effectively and be organized we can get a lot done.

**Danny:** I prefer the smaller model

**Dustin:** It’s not a question of want, it’s a question of need. I think we need to get bigger, not huge but big enough to have enough developers to handle bug fixes, and server issues quickly, also to provide each developer enough time and tools to implement robust testing systems. Also, to have a more robust project management and code review team. Another reason to get bigger is to be able to welcome more opportunities for niche development and broaden our clientele.

**Marisa:** I see adilas as a medium to large-sized company with a “small to medium” company mindset, keeping the best interest of all those involved at the forefront of the decision making processes. The places where I think we could expand and get a tad larger would be in customer service and tech support.

**Russell:** Smaller, tight knit group for the core, but allowing for people to build whatever size ecosystems/groups/businesses on the side. Train tracks type analogy.

**Sean:** Although I am very new to the ADILAS Team, I know Steve’s goal has always been to keep the core as small as possible, but the whole, big enough to successfully service all of our clients.

**Summary:** Keep things as small as possible but work to balance resources for now and into the future. Keeping it small and nimble can make it profitable and serviceable. Maintain the smaller core team while creating an ecosystem that allows for other development and expansion.

We need back-ups for the different players to keep filling the needed roles. There are some known needs for a more robust team for code sign-offs, project management, server/IT, sales and marketing, as well as other services and support.

1. What is our time frame to get there? (Size & services base/destination)

**Steve:** When we reach the Balance desired. We can speed this up with selling the current model. We can slow this down by not selling the current model.

**Alan:** If we stay small I think we could get to as big as we need to in a couple years if we bring on a new system each week (4-5/mon).

**Bryan:** Grow naturally and fiscally conservative.

**Chuck:** As far as size I think we are pretty much there unless we feel we need to add more devs to decrease the time frame of some of our projects.

**Cory:** I think this is what made me think size of product not people. As far as people go I think we are pretty close to being there, with the exception of needing a Wayne sub, and possibly another consultant.

**Danny:** I think we are pretty much where we need to be as far as size

**Dustin:** I honestly don’t know. I would think we should start the process now.

**Marisa:** I’d say between 2-3 years?

**Russell:** 2 to 3 years – for a base model

**Sean:** As Brandon mentioned, this has been a known need, for quite some time, but I think a solid plan can definitely be achieved within 30-60 days.

**Summary:** Our current time frame is to continue growing naturally. There may be some growth that is particularly needed in certain areas. One of our first goals is to get a plan in place. Based on that plan we anticipate a roll-out of that plan within 2-3 years.

1. What do we want to do/have for our company/user culture?

**Steve:** Company - To reach and support the Balance by helping Businesses Succeed - Founders Independently Together

User - Ability to Succeed in Business - Supported by Training/Oversight/Future Growth

**Alan:** I personally like our culture. There could be better defined channels of responsibility potentially to resolve and complete tasks. I like that things aren’t so rigid that you have to jump through a bunch of bureaucratic hoops.

**Bryan:** I like the company culture:

* + 1. Easy access to staff assistance (If I need to contact any of the staff, I can).
    2. Knowledgeable and helpful staff.
    3. Opportunities for input (like this one).

**Chuck:** Overall I have enjoyed working with the people that I have, one of my favorite things about working for Adilas is the people.

I do think it would be nice to have a bit more organization (kind of similar to what we have been doing with the summer team).

Lastly and I know that you have been aware, I would prefer to work less with the MJ industry and pursue more contracts with things like campground management and the like. But that is also my baby so you can take that with a grain of salt.

**Cory:** Laid back culture like we currently have.

**Danny:** I like the idea of a tight group that works together to solve challenges. I do believe there has to be one leader that ultimately makes the final call when things seem to be in a gridlock.

**Dustin:** I love our company culture and don’t want any kind of fundamental change.

The dominant user cultural trait as far as I can tell is frustration with a general understanding that Adilas is the best of the options even though it is so frustrating. I think we can change that with some strong focus on making things easy/pretty.

**Marisa:** Pretty much what it is now. A culture where those involved make decisions and work together for the common good of everyone, including the customers. Where we don’t feel pressure to conform or do things a certain way but have space to freely create and transform our own thoughts, ideas, and processes into a collective pool of greatness and creativity.

**Russell:** I really like the flexible model, would love some more guidelines and procedures. Make things powerful, beautiful, and easy. Lots of structure but not overbearing.

**Sean:** From what I have experienced, so far, the culture is very relaxed and each individual has a lot of flexibility, as far as the assignments that they take on, and the time that they put into those assignments. This has been a very successful model, so far, but depending on how big ADILAS gets, there might need to be some tightening up of duties and assignments, but hopefully, the laid back culture will continue.

**Summary:** We are striving for a culture that allows easy access to staff, flexibility and diversity in roles, independent/dependable type model, open communication, and a tight and friendly core team. There is no cap on how big the team can get but we want to make sure we can cover needs and still keep it a smaller, intimate core like a family where everyone can participate, give ideas, and contribute. As we grow there will need to be some tightening and refining of roles and processes but we want to keep the same general flavor we currently have.

1. What are some of the things you like about what we are doing right now?

**Steve:** Evolving towards the Balance

VPS / Development Coordination / Phone Tree / GUI / New Features

**Alan:** I have always really enjoyed the people I get to work with and the problems that we get to solve for our clients. I like the freedom to dream up solutions.

**Bryan:** Increasing expertise and education (for example: Russ, Alan, Wayne etc).

Clearer organization (Cory/planning/charging for work).

**Chuck:** I enjoy the general culture of Adilas and the people I work with. I love the flexibility and work environment and working from home. It has allowed me to have the lifestyle I want to live, and to live where I want to live.

**Cory:** The oversight and added testing before adding code to the database is making a big difference.

Working on a phone tree to better help our clients and use the limit resources we have in a more directed manner.

**Danny:** I love doing the coding work. It’s like always having puzzles to solve

**Dustin:** I love our how helpful and friendly all of the developers are. You have all helped me learn how to do this overwhelming thing (learning Coldfusion/Adilas backend). With enormous amounts of patients, understanding and care.

I love how the pressure I feel to get things done comes from a desire to help out the customers instead of internal pressure from my co-workers/company.

I like the flexible work hours.

I like how we are inclusive in the broader company direction.

I like Steve’s attitude towards traditional bosses.

I like how we are willing to broaden our clientele by trying to capture more/other markets.

I like how powerful Adilas is a tool.

**Marisa:** Exactly what I stated above.

**Russell:** Flexible, good people to work with. Loves a lot of things including the great people that we work with.

**Sean:** I think it is great that nearly all of the work can be done remotely, without having to report to an office or location every day. In my brief experience, it also seems like everyone knows where they stand, where they excel, and where they can contribute to the whole.

**Summary:** Adilas team members like who they work with, the flexibility and diversity of the work, the challenges and problem solving, the dreaming, continual learning and the culture of Adilas. The team is also grateful for efforts made to refine and define company processes and policies. We would all love to keep working toward a common goal/vision/dream moving forward including expanding the tool set and platform into new markets.

1. What are some things you would want us to change?

**Steve:** Sales

Keep refining structure and evolve the architecture for Deployment and Support

**Alan:** I feel like we are teetering on the fence on where we want to go as a company. We were built more as a solution for the small guys, yet now we have demand from major companies that like our solution, but they expect and demand an enterprise level product. Are we going to define what we are (small vs big)? If we want to keep both, maybe have 2 entities, 1 focused on the small guys and one focused on the larger companies because their needs will be different. Which are we going after and which are we trying to live up to? I feel like if we don’t decide which to target, we might be stuck in no man’s land where we are thinking about the small guys with development, but think about the big companies with the server reliability and scalability.

I feel like our risk management is our largest vulnerability right now. I think we should have a hybrid of our old approach and the new approach. The old way was just to push things up and fix them as there are issues; our users are our testers. We have a lot of companies that don't mind that as they get access to the new features and don’t mind being the beta testers. Other companies really detest that model.

I think it might be worthwhile to create 2 groups of servers.

-       Group 1 would be our beta corps where we can push changes up to those whenever those changes are ready and part of their perk for being the beta testers is they get quicker access to new features.

-       Group 2 would only get new features after they have been beta tested and only get updates quarterly or bi-annually, so the risk of service interruption is decreased.

**Wayne:** So my response to this is the same as my response to questions 5,6,7 and 20 I want to have a complete testing suite that we can use to automatically validate our code and systems. It is this kind of backend structure that allows us to successfully continue the looser more independent development and management structure that we currently enjoy.

**Chuck:** Once again, I would rather move away from the MJ industry and focus on other verticals.

**Cory:** I like the idea of adding training/service inside of Adilas. I think that is the only way to really start helping our existing clients and make sure they aren’t slipping through the cracks. Moving forward with new clients, I like the idea of working as a team to train and support. \*We do need to raise our rates or figure out a way to charge for this service though as Adilas can’t afford to pay for this.

**Danny:** As much as I like the morning developers meetings for checking in, at times it is a bit frustrating as it sometimes feels like it get’s taken over with server issues instead of quick coding questions.

**Dustin:** We need a team of testers on a dedicated system that test all code thoroughly before deployment.

We need a broader avenue for newer developers, (like me) to get help quickly when we are stuck. My issue with the current system is that I don’t know when I will need help until I do and then not being able to get it at that point can stop me in my tracks.

We need to implement a company wide solution for unit/integration testing with extensive support and training.

This is probably a stretch, but I would love to see each developer (who wants too) have a second developer that shadows/works co-operatively on projects. I think that if I had another developer (or junior developer) to work with/bounce Ideas off of/team up on projects with. We would more than double the output.

**Marisa:** I think by doing this right here, asking for everyone’s input on how to structure the company for all those involved may be the change we need. We all just need to come together and get on the same page of what vertices to take on next and map out how we get there successfully. This product has the ability to change many industries and if we can focus our time and energy into one or many vertices based on groups of individuals who have experience in each of those fields, I think we can go very far.

**Russell:** He would like to see more structure where it is needed – not everywhere – but where needed. Roadmaps and plans and procedures in place. Estimates vs strict bids or quotes.

**Sean:** Coming in as a brand new addition to the Team, without specific clients, but having a lot of ADILAS experience, I would love to be able to assist some of the smaller issues, for companies, that no longer have an ADILAS Consultant. I also know and understand that Steve wants he and I to focus on acquiring new accounts, and that is what I have mostly been focusing on.

**Summary:** People like our solution and what we offer we just have some points that need refining for moving forward. Some of these refinements include: improving sales, more automated testing, more structure and management where needed, risk management, reliability and server up time, access to others who can help you, requests to move into different business verticals and who we can service. In many ways it feels like we are at a crossroads where we need to decide if we are going to stay small or move into that medium to bigger range. We are also seeing a need to raise rates and be able to charge for other supporting services that are needed and can be provided from the internal core team. One of our other major needs is creating a focused plan or road map in order to share and build the vision.

1. As far as structure, what do you like? Do you like the independent model or would you like it more solid?

**Steve:** Independant Dependable

**Alan:** When I first started I would have preferred to be an “employee” and have the security of a steady paycheck, hours, benefits, job title and responsibility, etc. The longer that I have been self-employed, I have started to really enjoy the freedom and options that I have available to me with this model. It took years to change my mindset, but now it’s hard to think about going back to the other model.

**Bryan:** We seem to be moving in the right direction.

**Chuck:** I really like the independent model it allows for exploration, freedom, and I think it builds a fun community.

That being said, some extra solidity would be nice. Some thoughts I have had in my perfect world on how I would like to run a business for my employees, if I had them, are as follows. I would allow them to work as independent contractors like we do now but offer a set of “bonuses” at the end of the year around Christmas time for full time contractors (30-40 hours authorized) that it was made clear was to help them through the following year. The bonuses would essentially be your benefits and would be as follows. Give them about $4000 - $6000 to pay for medical care (based on rough estimates of about $300 or so a month from the market at the time) with some extra so they could choose to either deposit it in a HSA or on a better plan of their choice. Everyone would also receive a bonus for time off that would essentially equate to about 2-3 weeks (depending on how generous you feel) of their pay for vacation and/or sick time. And then I would add about $1000 for equipment purchases for new computers, software and the like that they may need to purchase that year (I would expect them to save this for bigger purchases, for example I need a beefier machine then most devs because I run adobe products so I would expect to save that so I could afford to upgrade my equipment every 3-4 years). And you may want to add a couple of thousand every year for retirement, though me personally I would probably buy everyone an ounce of gold or something because I’m into precious metals for my retirement savings.

**Cory:** I think a hybrid could be good. I like being independent and also working inside. This may not work for everyone but it works for me. Variety and change are what keep me excited about my work.

\*I was working with a client (not my client, just a client) and I was able to help them really understand what was going on in their system and how to fix it. Helping people is my favorite part of this work, and I don’t want to give up consulting. But most of my clients don’t really need me that much as they are already trained, so I want to be able to train others, possibly from within Adilas. I like the idea of commission sharing for this reason. A team taking care of clients makes sure they are super taken care of. I don’t think people would mind paying for this service/support if they knew about it and had the option up front.

**Danny:** Definitely the more independent model

**Dustin:** I like the independent model for most developers. I think it only makes sense since people have specialties where they are more involved with specific client types for them to be able to focus on those specific development needs. However, I think that some developers are needed in dedicated roles as well, like: Integration. Testing. Bug hunting. Look and Feel. Server. Project Management. Code Review. Etc.

**Marisa:** Personally, I am a fan of the independent model. Being able to choose my own direction with my own abilities and have a flexible schedule of being an independent contractor is exactly what I think makes adilas so unique and attractive.

However, I can see how this could be one of our downfalls, as it allows certain people to come and go as they please. I know it would be nice to have certain dedicated people that always handle certain aspects in a timely manner. I will admit fault here in the marketing realm...as an independent contractor, it’s easy to say “because I’m not employed by this company, I have the freedom to work whenever I please and if I don’t get to that right away, it’s no big deal.” And I know that, personally, if I had a little more structure/pressure on me from a “boss” I would perform some duties much quicker and maintain a sense of being “needed” or “essential” to the company.

With that being said, I still think we should maintain the independent model yet put in place a more solid plan/structure to encourage everyone to keep on track with their responsibilities as it benefits all involved. Myself included :)

**Russell:** I personally like the independent model. It would still be nice to have some benefits and incentives though… Fast and small enough to get the job done but not too big and bulky.

**Sean:** From what I have seen, the Independent Model has been working great, so far. However, at some point, as ADILAS grows, and newer support roles are brought in, there might need to be more of a solid structure, for the newer additions.

**Summary:** Overall everyone seems to like the independent dependable type model. Having said that it does seem to break down as it scales. What this means is the independent model has been great for our start-up and growth. However as we get bigger, we are progressing to the point where certain things are needed and required. Some of these new needs are managing people, expectations, time lines, budgets and who has the decision making authority. On the positive side we are heading toward refining all of these areas. On the other side some of these changes take time, may be uncomfortable, and have an expectation that they should already be in place. Some of the other requests or wants are things like perks, bonuses, sick time, vacation time, equipment, retirement, cost of living raises, etc.

Dealing with our model and structure we want to approach it as if it is an abundant model. Meaning there are tons of talented people all around us who can help and do things. Whenever we think of a limited amount of people who can accomplish things it constricts our thinking and progress. We are trying to build a community. We don’t have to own the bank, the school, and the store but we sure would love everyone to participate. We are seeing that some sort of advisory/community council is needed. This doesn’t mean that we have to go huge and corporate but there will definitely need to be a regulating body.

As things continue to develop and become more refined we anticipate there may be more trending toward specialties and specific roles. We may end up with some hybrid of this independent dependable type model and traditional business structure.

What we are leaning towards is the concept of the Adilas Cafe and community and the Adilas Marketplace. Adilas will own and control the core while other services and opportunities will be outside parties.

1. Do you like the jellyfish model? (Organized with a loose, flowing feeling. Adilas is the overarching umbrella and there are a number of sub departments or subsets.)

**Steve:** There are naturally different aspects to the success of a business. People can pick and choose where they like to help and work with those already there.

**Alan:** I don’t feel like this “jellyfish” model is all that different from a normal business model. I feel like it only really feels different because we aren’t large enough yet to have teams dedicated to the different sections and many are individually managing or providing several of these “departments” by themself. I would say the only thing that is different about our structure is the money generated in each department isn’t really managed the way a typical company model would handle it. A typical model would have all the money go to Adilas and then Adilas would budget how much would go to each department. I feel like our model is the money goes straight to the department and then Adilas sends a little extra to the department and rarely does Adilas get any type of money kickback.

**Bryan:** It works for now until we find something better.

**Chuck:** Yes, I like it because it helps my life be more interesting. I like shifting between different areas to keep my job more interesting.

**Danny:** I like the idea of more along the lines of an octopus. Something has the ability to move in direction (not just free floating) yet can mold itself to slip into places other corps can’t due to the rigid structure of say a “shark”

**Dustin:** Yes, but this diagram is misleading. Some of those bubbles are tiny and others are much larger if we look at this realistically then that distinction is important to address/consider.

It is also important to consider the “Powered By Adilas” opportunities in addition to the Jellyfish.

**Marisa:** Yes, I love this model. Especially because it doesn’t feel like one department is better/more important than any other. It takes a collective effort of all departments to made adilas succeed.

**Russell:** He would like to see more reports and metrics that show who is doing what and what things are costing. Looking at different ways to help out the team to be more efficient in their different jobs.

**Sean:** I do like this model, especially if you have some people who have responsibilities within several of the different subsets. As long as everyone understands the subsets, that they have responsibilities in.

**Summary:** Dealing with structure, what we have seen is that there needs to be a common purpose that brings us together as a company. The main thing that fuels all of the other pieces tends to be the monthly reoccurring service and/or platform. Without that common piece we would all just be a number of independents without a reason to be associated.

Because of the uniting factor of the system it tends to create numerous byproducts that become additional services or needs for our clients. These byproducts and services span various different departments. This allows us as independents to work wherever we have strengths or can fill those needs. Currently the model is very loose but we definitely see more tightening and more structure coming into play.

Going forward we would actually like to look backwards and use some hindsight. What we have done and/or are doing we could not have done alone. Often traditional models tend to put one person in charge with others under their supervision. We, on purpose, are trying to create a multi-faceted head or advisory board. Adilas is so broad and there are so many needs that multiple people will be in charge of different areas or teams.

As we keep developing, around what is already working, our goal is to refine processes, create better checks and balances, define roles and responsibilities, and better allocate budgets and resources. As these changes come in to being we will be watching for better efficiency, defined responsibilities, management of small teams, true costing, and profit generating services.

The Adilas jellyfish model will continue to evolve. If the jellyfish concept seems too passive, it was recommended that we could think of an octopus type model. An octopus has multiple functions but is more deliberate in it’s decisions and movements. An octopus is also a bit more firm than a jellyfish.

We are very versatile, as a company, and we keep going day after day. We will keep working and refining it as we go. We love to help people and we love to help people succeed. We do need all of these pieces - it has to work together as a system. If you want to go fast you go alone. It you want to go far you go as a team.

1. Would you want to see something different (company structure)?

**Steve:** Goals and checkpoints along the way to the Balance

**Alan:** See above

**Bryan:** I think that the current structure is working.

**Chuck:** Mostly I think more organization would be helpful to standardize some things, helping us to be more effective in knowing where to go and what to do. But we are working towards this!

**Cory:** Possibly, but I don’t like the idea of bureaucracy and I don’t think this group is into that.

**Danny:** I like a leadership structure. Using a band for example, someone has to make the final call (right or wrong) on decision making. If everyone is left to their own device, the music does not sound as good as if someone orchestrates or producers it into something pleasing.

**Dustin:** As mentioned above; in addition to those who want to work independently on projects, I would like to see a team of dedicated developers who do Integration. Testing. Bug hunting. Look and Feel. Server. Project Management. Code Review. Etc.

I would like to see a way for questions to be routed more efficiently. For Example: I get a lot of emails from consultants asking for help finding issues that end up being miss created/allocated/handled plants that don’t have a code-based solution but more of a consultant investigation solution. My instinct at this point is to look for code bases solutions and I often waste time looking at my code trying to solve a non-code problem. It’s not their fault, but it would be helpful if there was a standardized way for people to seek help where it gets routed to those with the right knowledge to fix it more quickly. This is a tough one because maybe I am the one who knows the most about the parts I have been worked on. Hmmmm……

**Marisa:** As I stated above, I think the only thing we might want to consider is a more solid and definitive plan, along with designated roles for each individual. I think what we are doing here is a great first step towards that.

**Russell:** Similar to above.

**Sean:** I don’t think I have a deep enough knowledge of the general flow of things, to recommend any structural changes, yet.

**Summary:** Most of the comments from those who are participating have already been recorded in previous questions. Our team likes what is happening and how we operate, they would just like to see some further pieces for efficiency and structure. Here are a couple of the things that were mentioned: goals, checkpoints, balance, budgets, specialties, small and manageable core, more defined roles, an admin core to be able to make needed decisions (leadership), standards, boundaries, and buffers. Part of what we are doing is making a plan. That will help in and of itself. We are going to keep doing what we are doing with purposeful refinement to achieve more defined organization and structure.

1. What products and services do you think we should focus on?

**Steve:** Operational and Accounting

**Alan:** I feel like we have a couple options we could look into.

-       Focus on improving something that we currently have but improve it/extend it (sub inventory/mini conversions).

-       Build out completely new vertical with custom interfaces that are industry specific (rentals/reservations, campgrounds, etc), our own white labels/themes.

-       User experience - Add more settings/interfaces to help new clients feel like they aren’t over paying or help them not be overwhelmed with all the options/features Adilas offers when they first come on the system. Could be limiting access to only specific main Adilas features, or creating a basic, intermediate and advanced page to limit functionality that is available for those pages.

**Bryan:** I like the way Adilas lets the clients decide what we focus on by them funding development.

**Chuck:** I really like the WanderWays product and several of the side products we have and would like to see Adilas move to focusing more on these and “powered by adilas” products.

**Cory:** Customer training (new and existing)

Streamlining e-commerce- making it more intuitive for all industries (it’s the present and the future)

**Danny:** I would really like to see “Wander Ways” take shape.

**Dustin:** I honestly don’t know but I think that the future is in online marketplaces and skill/need social connectivity. We need to look at things that are easy to monetize and have low maintenance costs.

**Marisa:** I am thrilled that a lot of our focus is heading towards WanderWays. Charles and I have put a lot of time and effort into this verticle and I cannot wait to see how it progresses. I believe this is the next upcoming industry to jump into while the market is heating up in the RV/camping world.

There is an absolute need for a custom reservation tool and if we can create one that encompasses everything adilas already has to offer with accounting, time management, payroll and more…..this is going to give us a GIANT advantage in this industry.

**Russell:** He likes what we are doing right now and wants to make it become even easier and more pretty. Modularize our products (toggle on/off for products) and be able to charge accordingly.

**Sean:** Main focus should be on always improving the end-user experience, for our clients, using ADILAS. I think we should continue to improve those offerings, that are built into ADILAS, but most clients use a Third Party solution to achieve. Such as e-commerce, the Phone Tree (when it’s ready), and menu boards.

**Summary:** Adilas already has a ton of things that have been developed over the years. Sometimes it feels like it is hard to focus on all of the aspects because so many things are needed. In general we want to say that our focus is going to be on operations and accounting - mixing the two. We know that is very broad statement. Having said that, think of how simple of an answer that really is. “What do you guys do? We do anything dealing with operations and accounting.”

As far as summarizing the ideas of where people want us to continue working, here were some of the ideas presented. Focus on what we already have, make everything hidden unless wanted, packages, levels, white labeled and powered by Adilas (under the hood). More automation and predictive tools, industry specific skins, time based features such as rentals, reservations, etc. Also more of a focus on user experiences - making things easier and prettier.

Other services will be whatever the clients need and trying to fill those needs internally instead of externally through the independent model. Services such as training, consulting, setup, custom code, project management, etc. will be routed to internal teams. Some other focuses are going to be adjusting pricing according to what people are using and allowing users/clients to decide where we go by what they want to fund.

1. Do we want to continue to internally fund this or seek outside investments?

**Steve:** 1. Sell Systems and Internally Fund

2. Consider funding such as Mike the CPA in CA

**Alan:** I think it depends on how quickly we want to be able to grow things. Getting outside funding allows for more hands-on deck to try and get a quicker growth. If time isn’t a major factor there isn’t really a rush for trying to move things along with that extra funding.

**Wayne:** If possible internal, the cash is nice from an investor but the goals of an investor are typically not the same as the operators of an enterprise.

There is definitely a loss of control to some degree.

**Bryan:** Primarily internal funding.

**Chuck:** I think both, I like how things have been going with wanderways we funded internal for a good start and then started seeking outside funding when we had a good idea to show. We may want to limit it to design concepts in the future to help with cost.

Smaller projects that we want to get into may be best to internally fund to keep funds made at full profits though.

In the future it may be a good idea to do a rough cost analyst to get an idea of how much it will cost and if it’s reasonable to say yes we want to keep this in our hand or nope it’s going to cost a lot, let’s put it on the table and see if we can get some help.

**Cory:** Debt is a burden that I know Steve won’t agree to and I think if we grow in a smart direction we can avoid it.

**Danny:** I believe we have to seek outside investors who also believe in our same shared vision.

**Dustin:** This is a tough one! I don’t have enough financial information available to me to answer this question.

**Marisa:** This is a double edge sword type of question so I will answer with what I see as pros and cons of both :)

Internally funded PROS =

* ability to customize the product/services how WE see fit
* no outside pressure to “conform” a certain way or develop something that doesn’t coincide with our internal business model/plans
* more control over our own desires for verticals that we feel are needed

Internally funded CONS =

* less opportunity for growth and development with limited access to funds
* puts most people on a limited hourly tracking system instead of allowing all to produce as much as possible for the greater good of the company (again, just due to lack of funds) therefore making it hard to make ends meet for their families and lifestyle.

Outside Investment PROS =

* gaining access to more funds in order to produce quality products for the customers and allow ourselves the ability to make enough money to support our families
* would possibility give adilas more funds to obtain greater resources such as customer support center, marketing funds and more
* allows collaborative efforts from outside of adilas which would help bring in new perspectives from different industries

Outside Investment CONS =

* less control of our products and services if we gain an investor who feels the need to take over the project and do it “their way or the highway”
* the interest that adilas may be required to pay back over the life of the investment
* communication between all involved must absolutely be key in order to succeed, and that can be difficult when visions and ideas clash

**Russell:** If you seek outside investments… there are pros and cons and the cons sometimes are pretty steep. Internal if possible.

**Sean:** In my experience, bringing in investors, from the outside, can often times lead to internal friction and bad outcomes, for the company. Of course, if there are internal sources, who are interested in funding some operations, equitable terms could be agreed upon.

**Summary:** Adilas has been slowly growing from it’s inception. Our plan is to keep growing in that model. However, we would like to pour on some gas in certain areas. We will try to be smart with this and adjust as needed but it feels like it is time to increase the rate of growth for certain areas. We may have some creative solutions that we roll out.

There are three general ways to get money. You can generate it through sales and revenue, this is full internal funding. You can generate through investments, this is starting to seek both internal and external resources. The other way to generate funds it through debt or borrowing.

Our number one goal is to increase sales and continue to internally fund this as long as we can. Our number two option is to potentially match people that want to invest monies and have a shared vision for where we are headed. As a side note, some of this is already happening. Current owners are already having discussions about what percentages of ownership could be moved around to raise monies for the future growth of the company. And our last option would be the debt/borrowing monies route.

We are aware of control concerns and who has say for the direction of the business. Here are a couple things we are discussing and considering. We would like to be able to make an initial offering of up to 30% of the company as an investment including cost plus gain taxes. The other thing we potentially have been looking at is gifting 10% of Adilas to the Adilas Trust and that would be broken into smaller pieces considering who is participating. Some other options are possibly offering or gifting a certain amount to key players and saying if they can help us get to a certain level we can gift or offer them a certain percentage more.

We are not sure what the total mix will be but we will try to generate revenue from sales, strategic investments, and other internal sources. Another aspect we haven’t tapped into yet is selling code or licenses related to specific business verticals. There is also the possibility of moving forward with diverse white label options.

1. What do we need on the management side? What do we need in leaders and managers? Traditional managers? Or more of a Board of Trustees or Advisors?

**Steve:** A Trust (Founders) are lead by Trustees (Founders collectively trusted)

If you love adilas you are a Founder. Where you know you fit in is your destiny. Seek your bliss and adilas succeeds.

My mom always said, "The cream will always come to the top but the milk is just as important"

In business school I learned that dedicated people care. If they care they will find a way to win.

**Alan:** I think we need vision and direction. We need a group to push us to reach that vision with attainable goals. Those leaders would guide and motivate others and get buy in. I feel that the leaders/managers from the different departments should make up the admin board to help keep and adjust the vision as needed to allow Adilas to grow in a balanced fashion.

**Bryan:** I think what we have works.

**Chuck:** As far as management, from what I have seen I have been happy so far. I think it’s important to have a good “the buck stops here” management system. I don’t mind middle managers as long as they have authority and not, “I’m just here so I can ask questions of the person that really has the power”.

I really love that you guys (Brandon and Steve) listen to ideas and take suggestions into consideration. I also like that you tell me why my idea is a bad idea or won’t work as well. It helps me personally feel like I’m part of the company instead of just “ya that’s nice, now shut up and go do what I told you to do”. Constructive feedback helps me expand my understanding more.

As far as a management structure, I don’t think a board of advisors would be bad as long as there is still a head that says “those are all great ideas, let’s choose this one and run with it”.

**Danny:** Leaders are important as noted in #8. Any successful team has a head coach who then has assistant coaches.

**Dustin:** Solid Project Management is important but there is no need for “Traditional Managers”. I think instead we need some people in clear roles, I.e. Integration and Testing, Server handling etc.

**Marisa:** I think a Board of Trustees would be a great fit for the adilas business model. A group of people who have the knowledge and collective understanding of the best interests of everyone involved, including our customers.

**Russell:** Have different hierarchies within the company. For example: small Sales team and a head of the sales team. A small developers team and a head of the developers team. Small design team, small R&D team, etc. These teams could be internal or smaller sub teams. Russell did like the idea of a board of trustees that help manage the others. He likes the open source model, but we still need a direct leader.

**Sean:** Again, I’m not sure I’ve been doing this model for long enough, to suggest improvements, but it seems like there is already kind of an understood hierarchy.

**Summary:** Leadership has been an interesting subject to talk about. We have some who don’t want to lead, some who do want to lead, and some who are willing to point out flaws and weaknesses. We know our leadership needs to be more firm than it has been. Our current plan is to stick with what we have and keep refining it. What is happening right now is that the current management will be a tag team between Steve and Brandon. The role is too large for one individual and needs to be a shared load.

Here are some other options that we are looking at and here are some ways things may change in the future. There has been a lot of talk of creating smaller, defined teams and making sure there is a leader in those teams that has authority. These teams may end up being called teams, departments, specialty areas, etc. Some of this is already starting to happen.

Some other important pieces that were brought up were, looking for people who care, want to play together, and are willing to keep pushing forward. There was also some talk about working with vision, direction, and attainable goals. The other subject that seemed to have some pull was dealing with listening to ideas and taking suggestions from others. Really becoming a cohesive team.

1. Do we want some sort of internal loyalty system or revenue sharing plan?

**Steve:** Profit sharing for every Founder

**Alan:** I feel like the loyalty system/revenue sharing could be good as a bonus for any quarterly profits the company has made and hasn’t spent, but feel like it should only be on net profits.

**Bryan:** This would be great! Steve and Brandon have been very generous in the past, and I have appreciated these benefits (with the server setup benefit).

**Chuck:** Some kind of stocks or share of the company for years of service wouldn’t be bad, but I don’t really think it’s necessary. If you do want to do it, you need to be prepared to allow people to cash out if they run on hard times or the like.

**Cory:** Sounds interesting

**Danny:** Revenue sharing is great yet there has to be enough incentive to attract quality people who can afford to stay with the job and support their families.

**Dustin:** Yes, Definitely. That would be a strong motivator for us to keep pushing the system forward and promoting its growth.

**Marisa:** My knowledge in this aspect is limited and to comfortably answer this question, I would need to do a bit more research on this topic.

**Russell:** Sounds fun for the core team. He would love to see the core team get some other incentives where possible.

**Sean:** I don’t really know enough about the financials, to know if this would be plausible, or not.

**Summary:** All services will continue to be done on an hourly and salary type basis. We will continue to keep working on projects and sales and continuing the full Adilas platform. There have also been lots of talks about options for revenue sharing. We don’t have all of the details yet on this but here is where we are headed.

As of January 1, 2021, we will be bringing into play the Adilas Trust. This will be setup somewhat like a miniature bank account for all of the Adilas founders and co-founders. Meaning the Adilas dependable family. This will allow for monies to be withdrawn, cashed out, saved, reinvested, etc. Each person will be allotted a certain amount on a monthly basis as a thank you/percentage.

If someone wants to leave, they will be paid out and percentages will flow back into the general mix. Payouts may be drawn out at any time; everything will be tracked like a virtual bank account. If monies are left in the trust, annual interest will be paid out (rate not yet set). Other rules and regulations yet to come. It should be fun. This is how we say thank you and pay some of you guys back for all of your years of efforts.

This is not in place yet, but we have been having some talks about setting aside a certain amount to help with things like taxes, perks, and other bonuses.

1. How do you play? What is your time commitment, scheduling, maxes and mins (hours per week/month)?

**Steve:** 5:30 to 8 most mornings. 9 to 6 Monday, Tuesday, Thursday and Friday except

Yoga from 10 to 12 on Tuesday and Thursday

Checking Email and Text most other times

A 50 to 60 hours per week involvement

**Alan:** However I am most useful, 35-50 hrs/week.

**Wayne:** My preference would probably be in the 15-20 hours per week range.

**Bryan:** I have played full time 30-40+ hrs per week.

**Chuck:** I currently work 30-40 hours a week.

**Cory:** Currently I’m averaging around 30hrs a week. I could definitely work more but that is how long it has been taking me to accomplish what I need to every week.

**Danny:** Twenty hours a week is perfect for me.

**Dustin:** I have been putting in approximately 30 hours per week. However, I am motivated to put in more time, but I am held back by my own lack of skills and I end up spending too much time trying to figure things out and researching code techniques and feel guilty about it. If I had a more immediate support structure to access when I am stuck, I would definitely clock more hours/get more done each week.

**Marisa:** My goal from the very beginning of working with adilas was to make this my full time job. I believe in the product and the company with all my heart. But currently, since funds tight for my family, my need for other commitments has me working at this part-time. Ideally, I would love to commit 40+ hours/week with adilas...primarily WanderWays is my goal. Once that vertical is built and ready to go, it is my dream to continue to enhance the product and take it to market by being a full-time traveling saleswoman for WanderWays

**Russell:** Currently, he loves the flexibility. As long as it isn’t hurting the company, he would love to keep it open and flexible. There may be places that need more structure than others (jobs and tasks).

**Sean:** I need to work between 35 and 40 hours per week. Mostly Monday through Friday, but occasionally a few hours on Saturday, if needed.

**Summary:** Commitment, time and how much people play are all variables. We would like to leave these variables as open and as flexible as we can. In general it seems like most of the dependables are between 10-50 hours per week. We’d like to cap it so you don’t ever go over 50. We want people to have a real life. Steve that means you too. ;)

If you read between the lines there are many that love working, love setting their own schedule, and/or are willing to do more but they are limited. We may need to look at resolving those limiting factors. Some of those limiting factors are fund availability, access to help or support, skill levels and talent.

Some of the positions that we are filling are self-monitoring and some need more structure and oversight. We will try to mix and blend as needed and we would love to be open to your ideas and suggestions. Along with that we acknowledge there is a need for more access to available help for code sign off, internal support questions, and project management.

Some people are of the opinion that you just hire new help and you are good to go. Many of the positions that are needed require an incredibly high level of knowledge and skills. That is not something you can just hire from anywhere. Adilas is also so big, there is no single person that knows it from top to bottom. There is a reason no one wants to step up and be the primary leader. There is also a reason no one wants to be point man for all the support and decisions. Adilas is so diverse and there are a lot of needs and multiple aspects. Being in a lead position is a challenging, ever transitioning role. It is very taxing and demanding.

Along with the regular Adilas dependables we also recognize that there is a need for seasonal helpers, limited hourly workers, special cases and other needs as they present themselves. They all play a part in the Adilas family.

1. What business verticals are you interested in?

**Steve:** All

**Alan:** I’m game for anything.

**Bryan:** I have done and currently am involved in programming, project management, research and development, tech support, and consulting.

**Chuck:** I am most interested in WanderWays and in general booking and vacation-oriented software and systems.

**Cory:** All

**Danny:** Music, Airports, Camping, Motorcycles (all these things I enjoy doing outside of Adilas)

**Dustin:** I am far more interested in the coding process and development in general as opposed to a specific market. Also, I don’t have enough knowledge to know which would be profitable or not.

**Marisa:** Well, I think I made this clear in my above statement :)

**Russell:** Project management, HR, finance, ecommerce

**Sean:** I think liquor stores, pawn shops, ski and golf shops, head shops, grow supply stores, CBD shops, wholesale importers, packaging supply businesses, smokers’ shops, independent pharmacies, and gun shops are all viable targets.

**Summary:** Adilas is a high-end software as a service (SaaS) company. We support any business needs dealing with operations and accounting. We have a standard package that we use and then we customize on top of that.

To expand on those three statements we would like to further define each one.

1. High-end software as a service (SaaS) - This is the whole package without saying it. Monthly service package and full business platform.

2. Any business needs dealing with operations and accounting - This is another whole package type statement dealing with the range that we try to cover. Most people understand different operations and accounting pieces and even know where they have needs and/or struggles. Easy foot in the door, yet very diverse.

3. We have a standard package that we use and then we customize on top of that - This says that it is somewhat ready right out of the box and with different settings you can configure almost anything... Plus, we do custom on top of a standard piece or process. The sky is the limit. You dream it up, we'll help you wire it up!

Most of the business verticals the Adilas team is interested in pursuing can fall into two categories - people’s personal passions and/or any conceivable business verticals. If you really want us to list all the business verticals we are interested in… We hope you are buying lunch. ;)

1. Where would you like to focus?

**Steve:** Our clients business

**Alan:** I want to break up the features in Adilas to offer clients smaller, bite size pieces of Adilas (mom & pop shops) up to the platinum level where they have access to all of Adilas’s features.

**Bryan:** Continuing work in programming, project management, research and development, tech support, consulting.

* I am interested in expanding and learning new skills as opportunities present themselves.

**Chuck:** I enjoy doing design and front-end development, I would like that to continue to be my main focus, but I don’t mind doing some project management, R&D, or even some advertising. I enjoy mixing things up a little.

**Cory:** All

**Danny:** Music is my passion. This is a good question that I haven’t really thought of in terms of Adilas that I will put more thought into. Where is my bliss?

**Dustin:** Making every page easy/pretty. I would love my job to be reconfiguring the front ends to be more user friendly and modern looking.

Developing an online user network with profiles, skill points and ways to connect power users in a part of the system with other users who need help in that same part of the system through skill point allocation and a connectivity search engine to get the right users in contact.

I would consider shadowing Wayne and learning the server side of things. I don’t know if I would like it or be good at it, but I am interested in learning about it and understand there is a need there. (There is probably someone far better for this job, but I do have interest in learning from Wayne.)

**Marisa:** WanderWays!!

**Russell:** As long as it all flows together, I’m in.

**Sean:** My beginning focus has been split between learning as much about ADILAS, as possible, and reaching out to prospective clients. As far as the second part of that, most of my =me has been focused on Montana Dispensaries, so far. Aber working on that for a while, I will shift focus to other industries.

**Summary:** We are going to leave this one kind of open. As long as we are servicing our clients needs and people are having fun learning and growing we want to keep the model open ended. We would love to leave options and choices on the table and leave room for people to pursue their passions. We don’t have any plans to force anyone into any particular thing. Except for so and so they have to be in… :D

Going off of Dustin’s idea of networking and cross training we would like to keep working toward the goal of a thing called the Adilas Cafe and community - somewhat of a social, networking hub. At the Adilas Cafe you could come to work, learn, buy, sell, contribute, or just hang out. Lots of options.

1. What are your thoughts on look and feel for the application interface?

**Steve:** SAAS by nature is dynamic and must evolve or stop existing. Coding is learning a language you will never learn.

We provide SAAS with emphasis on the last S. Software As A Service....... The extended Service is we develop for the success of our clients.

We allow them to grow both by providing a business solution and by allowing that solution to be refined.

All the refinement grows the solution for every client and future clients.

We are going with the flow and that is the easiest path. It's taken a while to find the path but to me it's very clear.

**Alan:** I love the direction things are going with having designated designers who think about and draw up the front end designs. I want to keep that going to make things simpler so we can hide features the users don’t need.

**Bryan:** Adilas has been actively engaged in making improvements (Russ’ and Charles work for example).

**Chuck:** I think the current updates we are doing for the system is the right direction for the current system.

In the future, I would like the look and feel to be more like Fracture and in general the look, feel and system build that has been suggested by Russell.

**Cory:** I think it could be more contemporary. I know it is hard to build to that, as the minute you get up to date there is a new look. I’m no fashionista but I would say our shopping cart could use a skin, which I know is on the radar.

**Danny:** I have been all over the board on this. I believe it depends on who our real market is. Simple is good for everyone so I am not so sure it has to look pretty.. it just has to be easy to understand how to use.

**Dustin:** It is a one of the loudest criticisms I often hear of our software is that it is too busy and hard to read and navigate. “Too many Clicks.”

**Marisa:** When I first joined adilas a couple years ago, my honest thoughts were that it obviously had great functionality and a plethora of tools for almost any business owner, but even I struggled to navigate the system and learn it to a degree of being able to run my own business (and I consider myself a pretty techy person). HOWEVER, the improvements that have been made over the last 6 months are a **giant** leap towards better UI and functionality. I am thrilled that adilas is working towards a sleeker, more modern interface that will allow a person with any skill level to be able to navigate the system more efficiently. Keep up the great work!!

**Russell:** A new dashboard interface would be awesome. Make it slick and nice. He has a number of ideas and options on his Pinterest account (small gallery of ideas). Good information with a nice graphical feel and flow. Nice graphs, BI (business intelligence), powerful, flexible, easy, nice.

**Sean:** I have seen so many improvements, within the last few years, but in the last few weeks, I have seen so much more, that I had never used or been exposed to.

**Summary:** When we started Adilas we decided that we wanted to get functionality done first, followed by look and feel. We know it is time to bring that pretty, modern look and feel into play. Some of these aspects are already being approached and more are on the horizon.

We have chosen to let the clients lead with their ideas, suggestions, priorities, and funding. This has directed our development and our growth thus far. We recognize that many people would like us to just spend the money and make everything pretty, but then you still may not make the goal or hit the mark, which is continually changing. We feel it is important to keep following the client’s lead and this will still be our main approach.

Having said that, we are definitely planning on extending more services, continuing to evolve and refine the interface, and keep following what is working. This will include getting a master plan in place. Many people have heard us talk about this concept called “fracture” - which is a name for a future project which will be a configurable, dynamic interface that will only turn on whatever pieces you want to see. Fracture will include countless ideas, lessons learned thus far, ways to improve efficiency, and breaking things into smaller modules and pieces. This will include more efficient navigation, dashboards, and user friendly features.

It’s beyond the scope of this summary to fully explain here but this will be incredibly powerful to be able to configure Adilas to whatever level of complexity or simplicity you want. This is like an iceberg mountain analogy. You still have the whole mountain but you only expose what you want to see - just the iceberg portion on top. It can make it feel easier, simpler, and more manageable.

The current model is composed of numerous, smaller prototypes that have been linked and wired together. Our eventual goal with fracture is to make all of those prototypes have the same look, feel, and flavor. This will be selecting the best of class from over the years and standardizing it across the platform/system.

Even though we are talking about look and feel, taking a team approach, helps us move forward in every aspect of furthering the application and model. People who work together are able to achieve more and that is how we are trending and changing our operations even further. More good stuff to come.

If you type the word “fracture” into the developer’s notebook you will begin to see how big our plans and dreams are for what we want to accomplish when we build to this “fracture” plan.

1. Let’s talk pricing. What are your thoughts?

**Steve:** Sell more so we can keep the monthly as low as possible. We need a deep focus on what value we provide and how to communicate to current and future clients.

**Alan:** I would like to work toward a tiered pricing where they have the ability to select the base option where they would be able to have access to 3-5 of the basic players in the system, then they could add additional tiers to add more features at higher price points. I think this will allow the entry level companies to feel like they aren’t “over spending” for the basic stuff they need the system for and we can charge a bit more for what our software niche is, that others don’t offer, all the key players in a single system.

**Bryan:** What do Steve and Brandon think?

Researching other competitors would seem to be useful. I think Steve and Brandon have a good handle on this.

**Chuck:** Considering what we have and all the services we offer we are probably in the good deal category, so I don’t think it would hurt to up our pricing. Especially after we move to Fracture.

**Cory:** Some kind of raise in price for new servers as of 1/1/2021.

I think for new accounts we could go up $50/month in cannabis for sure (to help cover METRC overhead)

New accounts non-cannabis= raise slightly as of Jan 1, 2021?

Existing accounts- cannabis= $20/month to deal with all the 3rd party connections?

Existing accounts non-cannabis= $10/month for new servers?

Charge for 3rd party connections- charge client or 3rd party

**Danny:** We are a great value for what we offer. I believe there are so many clients that use only a fraction of what we have. As a result when they compare others systems to us, we may not seem like such a good value since those systems are doing specific tasks for either less or they may get more support for the same dollars.

**Dustin:** I think we are a mature enough company to raise our prices overall, however, I think that expanding the tiered system to include levels of service/access to dev team/consultants/etc. with an overall goal of being inclusive to all sized businesses while still charging the more needy companies enough to be appropriate for their additional requirements.

**Marisa:** I am going to echo something that was said in the meeting this morning…

While I feel like our prices are very reasonable compared to other SaaS, I also feel that we cannot provide the support and development that our bigger clients crave and need with our current pricing. If we were to up our prices and generate more income, adilas may be able to provide the support and development needed to take care of those clients.

**Russell:** Modular – the price has to be reflected on the size and what you do and use.

**Sean:** I don’t have a clear enough understanding of what some of our rivals are charging, to know where we line up. Based on comments that I’ve heard, I’m guessing that we are at the lower end of the pricing range. The question becomes if you want to raise prices to improve quality and reliability, which would probably see us shift more towards larger businesses, if the smaller accounts were priced out.

**Summary:** As we mature we are seeing the need to keep increasing our monthly rates. People are wanting more and more services and custom features and we are desiring to rise to those occasions. We are looking forward to getting to the level where we can hide a number of pieces or features and allow people to only expose what they want to use.

It is not here yet but futuristically we are looking forward to having our project called “fracture” reflected in our base pricing scheme. A lot of the team suggested ideas along these lines with modular packages and tiered pricing. This means having prices reflected by the services and features companies use or consume instead of the full package based on monthly rates.

People want a value for what they are getting but they don’t want to pay for things they don’t need. Our challenge is going to be providing enough control over the features and interfaces that clients feel like they are getting a good deal and still able to do their job. Our recipe for success is choose your flavor, pick your tools, skin your engine, build your world!

There may be people that don’t actually want to build their own world or select all their options from the available features. They want something pre-made and ready to go. We may need to come up with preset selections and packages to sell per industry, size, and business function needs.

If you want a fun analogy for what we are trying to create - imagine a floating city built on a platform where you can endlessly build and expand on top of a powerful core and cool tech. Tons of different buildings and structures within the city. Each building within the city could represent a business vertical or industry. We could then customize and build based on those needs.

1. What about marketing and sales?

**Steve:** Increase, sell the current model, raise revenue to take adilas to the balance.

**Alan:** I don’t have much experience in this area, but think they are important if we want to grow. I think that word of mouth is ok, but it will only get you so far and definitely is slower.

**Bryan:** I like what Steve has been doing - stepping out and working on sales.

**Chuck:** I think we need to increase our marketing presence in general, especially in new verticals as we build them.

**Cory:** Definitely need more sales

**Danny:** This is a tough one for all companies out there now. Marketing and sales are changing so quickly in these times (much more so than development). I wish I had some answers on this.

**Marisa:** Speaking from the marketing side...this is where I feel adilas lacks the most. I love dreaming up ideas for marketing and putting my dreams into the videos and flyers, but we need more structure and guidance here as to what the overall objective is for the company as a whole.

It would be nice to have a finalized marketing structure where we fully outline our marketing goals and where we would like to put our efforts. Some questions that need to be answered are…

1. How do we increase brand awareness? Through social media, online advertising or some other platform?
2. How do we generate an increase of quality leads?
3. How do we attribute our marketing activities to revenue generation?
4. How do we increase brand engagement? How do we get people to spread the word about adilas for us?
5. What business objectives does the marketing strategy need to support? Increase revenue? Maintain profit margin? Etc.

**Russell:** Videos are huge! Use generic terms and common terms vs our own lingo. Think of SEO (search engine optimization) level terms. Help people find us better and quicker.

**Sean:** This needs to be a major focus, so we can get new clients in new industries, and continue to build the business.

**Summary:** Everyone agrees that this needs to be more of a focus as we go forward. It also seems important to give praise and encouragement to those already working on these pieces. One of our top goals is to be able to sell the current model.

We know that things change quickly but we are determined to keep building on the business verticals that are currently producing and others we see that have potential as we keep going forward. As these new business verticals get developed we will actively work to build marketing plans and deployment strategies along the way.

We may have to reverse some of our current engineering processes and our approach to building and selling the platform. We have always been great builders but our marketing has always struggled a bit. Most of our prior marketing has been word of mouth but we need to actively start getting people to come to us looking for a solution. We want our marketing outreach to build momentum and excitement.

To be fair, the entire marketing plan is outside of the scope of this document. A whole new marketing plan will need to be developed. One of the exciting aspects is we already have people on our internal teams who can help us market and help us push this to the next levels.

The marketing plans may need to change depending on the verticals. Plans will include needs analysis, direct client input, SEO (Search Engine Optimization), common terminology, videos, training, industry specific user interfaces, user-friendly design, dashboards, etc.

1. What about code, databases, automation, testing, deployment, and other techy stuff? Back-ups, redundancy, mirrors, servers, clusters, etc.

**Steve:** Continue improving, keep chasing the advancements of technology.

**Alan:** Again, here I feel like based on pricing and their willingness to be beta testers or secured systems we could have 2 clusters. 1 that gets the beta stuff and maybe doesn’t have as intense a redundancy system, and a 2nd that has the complete redundancy and an older stable code base that only gets updated quarterly. Those in the 2nd group would pay extra for the added redundancy, support, etc.

**Wayne:** Yes, all of the above.

**Bryan:** I like working with people that have expertise and are interested in these things (Wayne and others).

* I like that I have had some experience in this (server setup).

**Chuck:** Not sure on a lot of the database stuff, but I tend to prefer open source languages such as html, css, js, and php or python and think we should consider moving over that way when we move to Fracture. Mostly because there is more support for the open source languages, and it would also help with our overhead costs to not be required to run Windows servers and pay for ColdFusion.

**Cory:** I second Wayne’s “Yes to all of it!”

**Danny:** Yes to all

**Dustin:** I would love to have a database table dedicated to cultivation and harvest and one for packaging that brings in all of the relevant information into one place.

I would love to have a corporate standard unit and integration testing model with dedicated help and standardized system and practices.

I would like to continue and expand the bit bucket pull request code review model.

We should consider refactoring legacy code using more modern coding languages. (Lightly and sometime in the future.)

**Marisa:** Again, this is one of those areas and I differ to others who are more knowledgeable.

**Russell:** Yes, yes, yes. We want to have an awesome code structure. Including ways for each of us to get quality training (individual and group). Keep advancing ourselves and our system.

**Sean:** It seems like we need much more overlap in the upper levels of this area. There are not enough highly advanced coders, to ensure that someone is always available, whether we’re talking about Servers, or general issues with code and bugs.

**Summary:** This topic is very broad and we are aware that there are needs for more of all of this. Multiple people chimed in and said yes, yes, yes, all of it!! In order to do that we are going to be forming a more structured environment, small teams, standard processes, and other things that will help us be more effective. Ideally each team will have specific roles and tasks but we will also do some cross training to empower those people who have skills and interest to play the way they need.

We really like Russell’s idea about improving the code, improving ourselves, and improving our teams. As far as changes in technology or scripting languages, we will keep an open mind, but we have a lot that is already completed and going back and changing or restructuring everything would be a monumental project. Most likely we will keep the current engine running and then employ teams to create the next level. Dividing teams into current or future building, teams for legacy upkeep and maintenance, teams on R&D, and other teams for working on fracture.

A lot of this growth will be things that we continue internally investing in, but if our clients have an interest in a particular area and want to support development there, we will follow the resources. By following the resources we are able to build towards our grand plans and dreams. We have a big vision for where we want this to go. Like in hockey, skate to where the puck is going to be.

1. What are your thoughts on education, training, and add-on services?

**Steve:** Phone tree is the start of support which will lead us to refine deployment.

**Alan:** There is a correlation between the amount of education/training needed and the user interface complexity. I feel like the more simple the UI is the less training/education is needed; the more complex, the more training is needed.

If we break things down into easier interfaces then the less training people will need when they join the system and their employees won't be as overwhelmed learning a new system. Then as they are comfortable, they may seek for more functionality, they move to the next level and they won't need as much training to get from A to B.

**Bryan:** It has been a good experience.

* Adilas training has benefitted my Adilas knowledge and relationships with staff/clients (Colorado, Cache Valley and in house training).
* Brandon’s training has been invaluable and allowed me to know and do what I do now.

**Chuck:** In general, I think help resources and videos for our product should be free for anyone to use similar to what we have in Adilas academy.

Conferences and in person training should be a paid service as it will cost employees time and money.

Although add-on services can be a nice revenue generator and I think they have their place (such as a specialized, really used or expensive feature) I think we need to be careful that we don’t do too much or it will start to feel like we nickel and dime people.

**Cory:** I think we can raise our image with more of this.

**Danny:** In this day, education is pretty much left up to the consumer as long as the resources are there. Short quick videos I believe could solve this issue.

**Dustin:** I would love to learn systems for unit/integration testing.

Continue Alans Code classes. (during a time of day I can attend. Lol!)

Have classes dedicated to learning all the ways that the users interact the different parts of the system.

**Marisa:** I think it would be beneficial to have more education and training videos for almost every aspect of the system. I know this would take quite some time to produce and would require a constant amount of updates, but if customers could quickly gain access to instructional tools, it would cut back on the need for them to call into customer support.

Also, a monthly online training would be a great idea. Once a month we take a poll from the users as to what they would like to learn the following month. This would allow the users to decide what they determine is needed to to brush up on their skills.

**Russell:** Bring it right to the user… make it so intuitive that they don’t need help files. Put the resources there when and where needed. Make it easy to get to and easy to adjust (able to change). Standards…

**Sean:** If there are needs out in the field, such as Manager training at a location that has lost and/or promoted someone, and that account does not have an assigned Consultant, or something along those lines, I would love to help out. I know Steve wants my main focus to be in sales, but if our customer service is faltering on some accounts, I could help.

**Summary:** Training, education, and other services mean different things to different people. Some are thinking about the client experience while others are thinking about personal development and their own experience working in, or with, the system. We would like to take all of these aspects into consideration as we move forward, they are all important.

Personal development is a huge motivator for our internal staff. We want dedicated people who have a desire to learn. This is a critical aspect to our growth and development as a company and for our application. We want to encourage people to seek out that personal learning and development. We will try to provide what we can but if you feel like you want more, talk to us, we may be able to facilitate additional training and growing opportunities.

Multiple team members mentioned a correlation between the complexity of the system, the interface, and the amount of training that is needed. We are aware of that ratio and we will be trying to improve the user interface and the user experience throughout the process of development and design. As we go forward we are going to bring interface and education together making it easy to get to and easy to use.

Quite a few team members mentioned just in time, small, laser-focused videos and other training resources being easily accessible and available to users. There were also some great ideas on figuring out what subjects people want to be trained on and offering that training as additional services.

Along with some of these additional services that we are trying to offer we hope that there will be an evident switch in the way things are handled. We used to farm almost everything out to reps, consultants, and outside resources. We are purposely striving to bring all of these services back to internal teams that will be able to better support our client’s needs. In this same vein we are also trying to push people more and more to use our internal pieces instead of 3rd party add-ons. We will still allow them but we are intentionally working toward offering these services internally.

1. What about custom and API sockets and integrating with other external products?

**Steve:** Mainly a waste of time, we should sell our own first and cut down on 3rd party solutions. Only provide what is needed such as hardware or CC processing.

**Alan:** I think that allowing companies to customize things is a niche that is unique to us and something that we are known for. I think there are ways that we might be able to manage our custom code/projects a bit better. Perhaps we set some sort of contract that would mark the custom projects as legacy after a certain point and no longer maintained and they would need to pay to have it refreshed, that way we don’t have to keep supporting it on our own penny after say 2 years).

**Bryan:** They seem to be increasingly in demand. I like the model that we build them as there is outside demand and money.

**Chuck:** I would love to see API systems to help with WanderWays front end and with our eCommerce solution. In short, any system that we are currently directing users away from the host page, should instead be sent to the host page with an api.

**Cory:** Pain in the butt- let’s build it internally!

**Danny:** It depends on the other companies. I say yes to those that add value to our products

**Dustin:** I don’t like trusting companies like Metrc to continue to support the work we do to integrate with them, however, I don’t know how much of a choice we have.

**Marisa:** I’m not too familiar with this topic either. The only feedback I have on this is what knowledge I have gained from working with Chuck and the fact that quite a bit of additional features can be run through API, therefore, I would think this would be a good thing?

**Russell:** API’s, API’s, API’s --- yes, yes, yes. Robust API socket structures and documentation.

**Sean:** I think a major focus of ours needs to be on getting our existing clients to incorporate more of our internal offerings, to ensure that there are as few 3rd party solutions as possible.

**Summary:** There are pros and cons with this subject. Dealing with API sockets, custom code, and external products there are some aspects that we want to keep, some we want to get rid of, and some we are required to keep. There are a lot of challenges in this area.

One of the biggest responses we received from the team was to point our clients toward internal solutions. We realize some of those may still need to be built out or better defined. Our goal is to create a system where people can do whatever they want dealing with operations and accounting under one roof.

We don’t have all of the answers for these diverse topics and challenges. We will continue refining our processes and products but without going super deep into each of these, some of the other topics we wanted to consider were:

* We like developing and using the API sockets we just need to keep refining this area and making it more robust
* Rules and expectations for 3rd party usage
* Overall server stability and security
* Who is going to fund what? Internally funded, client funded, community funded, etc.
* Which external solutions are we forced into keeping? What does that force us to do to maintain those relationships?
* The power of having an integrated system like Adilas versus mash-ups or marrying multiple external pieces
* Maintenance schedules and funding
* We do custom code and custom solutions, therefore what does that entail and how do we manage that? - That is a whole different subject in and of itself
* Demand, wants, and needs - if we want it and it adds value, and the clients want to fund it, let’s play - otherwise we need to say no
* Increase training, ease of use, and documentation
* Problems with external solutions - it has caused huge pains for our team and created multiple distractions, time sinks, and frustrations for our clients

The team consensus is, wherever possible - Let’s build it internally!

1. If we do a trust what are the other rules or parameters we want to set up? Is it just time, is it time and money, is it investment, what is necessary if you want to buy in? How do we determine who is active and not active? How many virtual family members do we want? Etc.

**Steve:** Smallest group of Founders possible, a scale to measure independent Founder trust level, a board of Trustees, a voting structure.

Founder - Person that loves adilas

Trust Value - Level of involvement of Founder, factored to a number

Trustee - Founder that chooses to serve on the board and is elected

**Alan:** I feel like there should be some sort of board that would have a vote on business decisions, future board members, and determining who is still considered active. I feel like time and expertise should play a major role in determining who should be on the original board.

**Wayne:** Normally these kinds of things are setup for employees like in an ESOP, they have specific rules about vesting, participation, and payouts. The most important thing here is that whatever the specifics are everyone needs to understand exactly where they stand at any given moment.

**Bryan:** I think this information is available and a good consultant (attorney) might be helpful to set up the structure.

**Chuck:** First off, I don’t feel I have extra money to invest in the business right now so I wouldn’t be interested in that. Time is more of something I would be interested in at the current moment. That being said we should consider contributions in either time or money in some fashion. Maybe we could put a dollar amount to time committed for investment levels.

Regarding active and inactive that would also depend on if they are contributing money or time. Obviously the guy committing time would not be active if he isn’t working on a project, but the guy who is just throwing money at us so we can continue to grow shouldn’t necessarily need to be an active developer at the time to get rewarded for the resources he or she is providing.

**Cory:** I think anyone who consistently invests time (TBD) can be in. Would need to set up parameters ie different levels based on how much time you have already put in.

**Danny:** I do not totally understand the trust idea. In concept it sounds good yet I wonder if it creates an environment of many Indians and no chiefs. Again I go back to leadership. At some point, someone has to accept the responsibility for success or failure. Failure is not bad, it just gets you one step closer to success.

**Dustin:** Obviously, I hope to be included in the trust when it is implemented. Otherwise, I am not focused so much on money. I will leave this question to those who have put more thought into it.

**Russell:** This is huge… What are the underlying purposes in moving in this direction? As a side note, there feels like a lot of what if’s if we head that way. Russell prefers a model where someone is charge but doesn’t mind an avenue where others could build and do their own thing (platform or railroad tracks type models).

**Sean:** Again, I have not been here long enough to have much say in those matters, but I am thrilled to be a part of it, and look forward to the future.

**Summary:** Everybody seems to be really excited about this prospect. There still seems to be some major unknowns. We will continue working on this, it is one of our goals.

People want to know the whole plan and how it is rolling out, how do you get involved, what are the rules, what are the benefits, possible problems, etc. From the input that we got you could tell that both active time and money, or different ways of investing, are of interest to people as potential investment options.

As this develops we will definitely need to look into things such as leadership, advisory boards, attorneys, rules, how decisions are made, and other plans.

Thank you for your interest. We will keep refining and defining the Adilas Trust solution.

1. Where do you see us (as a company) in 1 year, 5 years, 10 years?

**Steve:** I see adilas in 500 years continuing to evolve.

Operational and Accounting solutions are some of the oldest forms of writing and will continue to be required for businesses to succeed.

**Alan:** Next several months – create a business plan of action/vision

1 year – practices and policies in place that will enable us to grow and reach that vision.

5 years – Expanded to a few verticals to bring on enough accounts to hit Steve’s goal of everyone making 10k/mon.

10 years – See Steve and Brandon partially retire.

**Bryan:** Meeting the needs of individuals and clients.

* Continue to innovate to meet the needs of our customers (the current conversations with Ram are a good example).

**Chuck:** In general, I kind of see the company going in one of two different directions. Either 1) we pursue other verticals such as WanderWays and we are focusing more over there and other places we want to grow and building new verticals and projects or 2) we say MJ is paying the bills let’s do that and become an industry provider around MJ which, depending on what happens politically over the next couple of years, could become a booming industry.

**Cory:** Continue to grow the platform. More contemporary look and feel.

**Danny:** I see us molding into an even tighter machine. I believe in this group of people. There are good core people on every level of adilas and I believe it is due to the construct of how things have been setup. The people that are here want to be here.

**Dustin:** 1 year:

Unit/integration testing and live user testing in place before every update to the system.

All of the major user complaints/bugs in our current services are fixed so Clients are happy.

Strong progress on Pretty/Easy implementation.

5 years:

Full social connectivity platform in place and running for some time. Users in need being connected with Users with skills and a fully implemented online payment system where we can collect a small percentage of the payment to the super user for the convenience of identifying them and connecting them to clients.

Trust and profit sharing in place. $10,000+ per month to all in the Family.

The organization being robust and organized enough so that Steve, Brandon, Wayne and people like them can escape the rat race a little and be able to rely on the other folk to handle more of the burden

Expansion of markets and the team so that the overall revenue is higher.

10 years:

We are all hanging out on a beach somewhere while Adilas runs itself. Lol

**Marisa:** In 5 years, I see adilas being slightly larger than what we are and to have a couple more vertices to bring in funds. I see WanderWays as being one of those verticals that will assist with this.

**Russell:** Still doing what we are doing and keep improving our process. Within 5 year, we would love to have Fracture build (the next level). Within 10 years, get everybody moved over to the newest model.

**Sean:** I think ADILAS will continue to evolve and improve, while reaching further into ever increasing industries.

**Summary:** What a business uses to accomplish their tasks and be successful will ever be evolving. One of the founders expressed their view this way, “Operational and Accounting solutions are some of the oldest forms of writing and will continue to be required for businesses to succeed.” With that being said we anticipate Adilas to continue evolving perpetually into the future.

We are fully on board with that idea and our goal and plan is to keep moving forward. As part of that process we actually need to create a more formal business and vision plan. We will work to follow along with this plan and adjust it as circumstances require. On purpose we are going to build in a little wiggle room.

We see the benefits of a plan to be creating a shared vision for the future, generating excitement, motivation, cohesion and unity within in the Adilas team while working toward our goals. We love to dream and build, this is at the core of what we really like to do. Having a more firm plan is also a great way to encourage other parties to help fund and participate in the growth and development.

Without going into too many details here are some elements that will be included in our plan:

* Keep tweaking on the transactional core
* Move client services more internal to Adilas
* Expand into other verticals
* Allow for custom code where needed
* Develop into levels that allow for deeper aggregated and/or business intelligence (BI)
* Grow the platform into an enterprise level app/system
* Along the way there are plans to do a whole application re-write under the code name “Fracture”
* Revamp the look and feel - improve user experience
* Create and facilitate the Adilas Cafe and community

Along with the list above here were some specific hopes, dreams, and goals expressed by team members for where they would like see Adilas in 1, 5, and 10 years.

* + 1 year - Get a plan to share the vision! Better automated testing and auto updates, stabilize servers, fix bugs to keep clients happy, and keep going towards pretty and easy.
  + 5 years - Expand into other verticals, improve look and feel, cultivate an awesome core team, increase revenue so that profit sharing and salary goals may be met. As a fun side note, we would love to get the whole core team up to $10K/month. Create social connections such as the Adilas cafe and community. Get fracture built out and transfer of management so that primary leaders could step back a bit.
  + 10 years - Just being silly but these things were mentioned - all hanging out on the beach while Adilas runs itself - :). In 10 years we definitely want to get to the point where Steve and Brandon can step back. We will keep improving and building and get everybody moved over to the newest model.

We don’t see Adilas going away and if people can catch the vision of what we are doing - everyone wins. Choose your solution and then help pay, or invest, in achieving that solution.

1. Where do you want to be in 1 year, 5 years, 10 years?

**Steve:** 1 year - adilas Development efforts solid, adilas Deployment 75% solid, adilas trust 50% solid.

5 years - many Founders earning 10k or more per month

10 years - Trust Retirement plans in place and funded.

**Alan:** 1 year – Trustee, being major contributor to coding in whichever direction we are moving.

1. years – Maybe move into more of a management role, overseeing the different developer departments (UI, Internal Dev, Custom Dev, Testing, Bugs, etc).

10 years – same.

**Bryan:** Increasing my capacity to be helpful

* In programming, project management, research and development, tech support, and consulting.

**Chuck:** First off I hate that question . I hope to still be working with Adilas but also seeing growth in my personal business as I continue to help with the camping and booking industry and build websites for those companies while also helping to update and improve both the Adilas system as well as WanderWays.

**Cory:** Working with Adilas and helping clients learn how to run their systems/setup their systems.

Working to help the development of the software in a useful, meaningful direction.

Making more money

**Danny:** I want to be sitting here continuing to have input while plunking away at coding.

**Dustin:** 1 year:

I would like to have the cultivation/harvest/packaging stuff working perfectly so that I can be working on Easy/Pretty and the social connectivity platform instead.

I would like to have unit tests and integration tests running in the background whenever I am coding so that I know what I am doing is going to work the way I expect.

I would like to have a more thorough understanding of the backend/cfc functions so I can code more efficiently.

I would like to have enough money to put a down payment on a house.

5 years:

Have the Adilas looking beautiful and everything be easy to use.

Have the Social Connectivity platform up and running and bringing in income and easy to maintain.

Maybe have developers that I can help out and do code review for like Alan does. (I will have to learn a lot in order to pull that off. Lol.)

**Marisa:** In 1 year, I would love to have WanderWays ready to launch and start selling it to campgrounds/rv parks. Once this product is ready to take to market, within 5 years I would love to be on the road traveling selling the product and continually improving on it. And in 10 years, I would love to have that built up so that I can have multiple people below me selling the product and maintaining it, helping others to make a living doing what I love.

**Russell:** Keep going!

**Sean:** 1 year - rocking monthly sales in new industries, and developing markets, within our more established industries. 5 year - Sales, Marketing, maybe Training. I would love to learn some coding, and dip my feet in those waters a bit. 10 year - Heavily involved in some of the coding processes, and working from somewhere else, in this crazy world.

1. Other ideas and thoughts?

**Steve:** We have a very unique opportunity that with continued tweaks to the foundation and structure we can create the ultimate company.

A company that will persist in perpetuity so our families and future families can enjoy the same work environment and earnings security.

I dislike the employee / employer model and know we can break tradition and succeed in creating the best company ever.

After all, we want to enjoy work, earn a comfortable amount and have time to enjoy life, correct?

**Alan:** I feel like I tend to be against any type of a style/developer guide that everyone must follow in order to code in the Adilas system. I feel like there are benefits to doing that, but feel we aren’t ever going to be big enough for that to really matter. It would be useful if we are constantly hiring new developers and have a large number of developers and multiple teams (30+), but having under 15 developers and usually only bringing on a few developers a year, I feel like we can just defer to a cold fusion sites for that documentation. I recommend they refer to Adobe’s help docs, cfdocs, learn cf in a week, or reach out to one of us. I think it more effective to let them focus on writing code and then have them clean things up as needed during code review if it is confusing/hard to follow. It might take a few projects for them to get a feel for things but it give the developer the autonomy. I know things are a little more sensitive with the front end code (html/css/js/jquery), but as far as backend stuff goes I think it is a waste of time and money for building and implementing the style guide.

**Bryan:** Thanks for letting me have some input!

**Calvin:** Calvin was calling to talk about some of the question on the adilas as a trust document. We talked about custom software and following the client dollars and money. We also talked about quality software and the value that brings. The conversation went into some politics and how often the politics tend to win out. Sad but true. Next, we talked about maintaining enough control and watching the back door (say you open things up too much, you have to then watch the back door).

We also talked about people errors, compliant issues, underlying and alternate plans of individuals and groups, and eventually cause and effect decisions and then the trickle down based on those decisions. Calvin recommended that we build in some checks and balances. We also talked about analogy of rowing a boat in a lake without any landmarks. Without the landmarks, you don't know if you are going in the right direction. We were relating this to goals and focused approaches.

As a fun story, Calvin and I talked about a raft flipping over and one of his sons getting caught under the boat. He couldn't get out without help. We talked about picking a single direction and trying to get out based on that single direction. Sometimes we over think it and second guess ourselves and virtually go in circles vs picking a direction and going for it.

**Cory:** Thanks for doing this. It is super valuable and important that everyone is giving input to all of these thoughts, directions, ideas.

**Danny:** I appreciate the opportunity to offer thoughts. Good, provoking questions!!!

**Dustin:** I really love working for Adilas and treasure the work environment on people that I work with. All of the suggestions above are just that and I trust that collectively we will come to the best solutions.

**Marisa:** I just want to commend everyone involved in adilas for making this one of the best companies I’ve ever had the pleasure to work with. The adilas team is comprised of some of the most creative and innovative individuals. We all keep each other motivated and the words of encouragement and helpfulness that we receive from one another is very special. Thank you to everyone who has made me feel like part of the family.

Let’s keep up the great work and move onward and upward!

**Russell:** Build the core and the platform and then offer other opportunities for others to build on to or off of the core or underlying platforms. Pay back to the core to keep it up and supported. Good people and good standards.

**Sean:** I am very appreciative of my place within ADILAS, and I will do my best to increase my knowledge and improve and develop my sales skills, so that I can get many new accounts for us, and increase our revenue. Keep in mind, all of my answers are based off of only 2 weeks of seeing a minimal part of the overall operation, so I apologize if I misunderstood any questions.