6/11/21

Group Sales Meeting

Marisa, Danny, John, Cory, Sean, Steve, Dustin, Shari O., Dawn, Brendan, Steve (mac), Brandon, Chuck, Alan, Kelly, Bryan

* Follow-up on M&M
  + There may be some time before they go live
  + Maybe hold off on all of the cultivation stuff – for now
* Thanks from Danny to Dawn and Brendan
* Checking on a mailout
  + Spend $500 to check it out for 4,500 contacts
  + Kelly was saying that there is some public records per states
  + We may try to pull our own list
  + Questions… who, what, where, how good, etc.
  + Maybe look at a sample of 10
  + We may need a more focuses approach
  + What about different industries?
  + We need to get the name out there
  + Kelly was pitching a social presence
    - Do we know anybody who wants to do the social stuff
    - Word of mouth
    - Testimonials
    - Some new video graphics
      * To the penny, to the gram, every day
      * What about small streaming commercials – focused and pointed
  + Kelly recommends that we maybe focus on a slightly larger pool
  + Dawn – maybe focus on start-ups or that small to medium range
    - Get them at the beginning – maybe even tradeshows
  + It is a pain in the but to switch over – pain creates options for change
  + Focus on services… deployment, oversight, consulting, training, best practices
  + How can we deploy something easily and repeatable?
    - It is tough to get some of the people started, but once they get all in, they tend to stay
  + Kelly has done this over and over again
  + Using the professional resources that are available
  + From Kelly – Help get the clients all the way in – full system and platform
  + Getting the success on the first implementation and then building from there
  + What about focusing on those who are having trouble and/or are struggling
    - Dawn loves the support, training, and feel good part of it – duplicate that feeling to others
    - How quick can we respond – we jump pretty quickly on custom needs, development, training, and support
  + Get more testimonials from our clients
  + We have some experience to offer to those who want it
    - What about pitching best business practices
    - It’s ok to be non-traditional
    - Being Relevant!
    - Focus on helping over sales – from Steve (mac)
    - Simple things that bring the relevant pieces
      * Social webbing – group effort
  + Danny, straight up, I don’t want to be the social media guy! We have to find the right person and/or persons (small little team)
  + We are not QuickBooks… what does that mean? Be our own style!
  + Packaging this platform based on the target audience
  + Formulating a plan – ease the lift – maybe a monthly meeting with some planning
  + Influencers and YouTube options
  + Small info tips…
  + New age marketing – we have to play to the current market
  + Big Dumb Animal Pictures – super simple
  + We have to do a cost analysis to see which one(s) make more sense for us
  + John, what if we setup our own little social piece (aka maybe the adilas café) – we could allow all of our users and power users to pitch and promote – we may need to approve things, but we have tons of very knowledgeable people and users
  + We are looking for engagement – back and forth – a relationship – maybe get an intern to help handle this
  + Danny – Switching over to the modal message marketing
    - How to save the app to your phone
    - Make the email piece better
    - Small web tool to help with building special html links to embed promotions, direct add to cart, discounts, campaigns, etc. A simple form to help with the backend tech of those URL’s and web links.
    - Maybe, we need to upgrade our email platform. It is a small holdover from years gone by.
      * What about the delay on the outbound emails?
    - Marisa – maybe outsource things as needed
    - Steve – would like more input on the bulk tools
      * Better filtering and target marketing
      * Steve wants to work direct with Dawn and Branden
      * Matrix and target marketing – even predictive
    - Maybe a little itty bitty (super small) native app on the different phones – iOS, Android, etc.
    - Steve wants to get into possible predictive marketing
    - Steve – looking for great feedback and even ideas and dreams…
      * Archiving, saving for later, dismissing, etc. We have the data, what do we want to do with it? – Wet clay…
  + Danny – Going back to past clients
    - Version 1 vs Version 2 – type attitude
    - What kind of clients do we want? We may not want certain kind of clients.
      * We love people who like details and are willing to play
      * We love people who take things to the fullest level
      * We love people who just need a small little piece – there is a gap in their current model and they need some help. We can then grow from there.
      * Do a full comparison of what we offer
      * Pitch what we do differently – we help deploy and maintain your ERP
      * White glove approach
      * Playing with the tools that we have and flipping those into marketing messages
  + Chuck – maybe check out some groups on Facebook
    - Blog posts, articles, info snippets, quick videos
* Talking with Kelly – how have we helped small businesses become bigger or big business – showing the potential – dreams to reality
* The small goals to achieve – steps to get to the next level
  + Small goals lead to bigger goals – getting some small successes along the way
* Clients and expectations – not all money is the same – budgeting and planning – what kind of client do we want
  + Reoccurring revenue vs one-time revenue
  + A quote is just one of many pieces that needs to be done
  + People, skills, and cogs in the wheel
    - We all care… where would you and your skills fit in best
    - Seeing the bigger picture
    - Maybe looking at personalities and figuring out the mixing and blending of our options and resources
    - Slowing down and taking the time to see where we are at? Virtual time travel – child, youth, adult – as a company
    - What’s the difference between a goal and dream? A plan!
    - The internal group summary that we did… a great start

///////////////////////////////////////

Second session - Servers & Infrastructure - Refining Our Processes - Tech Support & Training - Project Management

Steve wants us to show the online label builder

* We had some good talk about where we want to go
* We pointed to our internal summary report
* Steve McNew – helping with the strategic marketing plan, technology road map, timelines to position, plans for action
* Scale – can we grow and can we shrink
* Conversation between big and small – perspective – big and small (sales, number of team members, lines of code, etc.)
* Molly – Is adilas the big guy or the small guy? Think of code (lines of code). We could be considered a big guy if you were looking at code and functionality.
  + We like being small (ish), but what if we are big already
* If we want to grow, that means that we want to get better – grow in a good manner and sustainable manner
* The underlying services that support the whole
* Be your own style!
* Steve McNew – old classmate with Steve Berkenkotter – guest speaker – part of the adilas team to help us get some things more standardized – processes and procedures
  + Defense contractor for the military – 28 years
  + Testing, software, management, auditor
  + He has already called, interviewed, and talked with a number of different team members
  + He did a 20 page audit and report on what he was seeing
  + Getting into some testing and processes – he would like to see more of this
  + Not trying to derail the train – we are trying to polish the Ferrari (spelling – awesome car)
  + Whitepapers – catering to a higher audience – going beyond stick figures and into technical docs – not everybody will want to read some of these, but there will be some that require it
  + Steve B – if we try to sell our product to those who can’t afford it, it doesn’t really work. They have to be able to pay for what we do (really do – billing for our time and efforts)
  + Fin-tech – financial technology
  + Using whitepapers as part of our marketing plan
  + John M – unit testing – confidence of the developer team – currently only Wayne and Alan are doing this (unit testing)
    - Going to ease into this – refining our testing plan
  + Version control and when do we update these systems? The older way was wild west… we may want to figure out some specific micro builds.
    - It would be nice to keep track of the versions and options.
    - The balance between core and custom development
    - The application needs some spring cleaning – what is being used, what isn’t, what is going slow, etc. – Refactoring
    - Priorities – customer priorities or our internal priorities – what is the mix and blend of these pieces
    - We all ware many hats… we may need to define that so that we don’t overstretch ourselves
    - We all use (and can use) the system in different ways – how do we translate that information to our clients, other developers, and other team members (upstream and downstream)
    - 2 minute videos – no more
    - Work instructions – even giving it to someone who has never done anything in the system
  + Danny – Shoutout to Steve and Brandon – we have done great – what is coming next? Resources?
  + Talks about earn and burn ratios
  + Prices have to match the services
    - We are a growing business
    - Kelly – going from 1.5 to 10 (millions) – that is a huge change
    - We are competing with companies that are hugely funded… what do we want to do?
    - There are some real things in our path – there is tons of potential – what do we want to do with it – also, sometimes there is shelf life on potential or advantages
    - We don’t want debt – however, there is a time for debt – cost analysis and being smart about it
    - Making choices, but also being willing to fail
    - Marisa – look at our new website
    - Steve – there are some percentages of adilas that are available – not looking for vulture capital (just being silly – vulture vs venture)
      * Someone looking to take on some risk but helping us to get to the next level, without taking over the company
    - Kelly – pitching our vision and business plan – we have to define the vision – Danny seconded the define the vision before looking for the funding – goals, sales, budgeting, maintenance, and getting a business plan.
    - Adilas Trust option – co-founders
    - Possible option – Maybe take some of IP (intellectual property) and sell that to a new entity and then restructure those new pieces
    - Dustin – thoughts on corporate structure – we are all on our own little islands – Ferrari to a tricycle – frontend compared to backend – splitting up those pieces and functions – he wishes that we could be more collaborated.
    - John – teams and buddy projects – small sub teams – full stack (all levels) vs specific skills or somewhat limited skills – this needs to be part of our plan.
    - Sean – we already have some small teams that are working on some of these projects – cogs of the wheel – buddy tagging the workflow and processes
    - John – the adilas docs project – and being able to go to it and also add to it – working on standardizing the pieces – filling in the gaps
    - Danny – Navy Seals – two is one, and one is none – at least two on a project – two-by-two
    - Kelly – scale – having a back-up
    - Danny – accountability back and forth
    - John – confidence levels
    - Kelly – what about a succession plan?
    - John and Dustin – real life buddies and how they help out each other – seeing a different angle or perspective
    - Marisa – tooooooooo much weight gets put on single persons
    - Kelly – relieving pressure and helping with scale
    - Marisa – Cory, Kelly, and Marisa – wonderful training slides, presentation, and delivery for the conference. Awesome job!
    - Alan – modularize things – able to be reused – code concepts can relate to business functions – one to many relationships – translating knowledge into real life and different scenarios
    - Chuck – last summer Chuck was on a joint project with he, Russell, and a different John. It worked out awesome – Keep pushing towards that kind of rollout of the project
    - Molly – thinking and coming up with ideas. Keep it going!

/////////////////////////////////////////////

Next Session - Deployment & Oversight - Design & Layout - Internal Core Development - Custom Development

* Deployment – where are we going and how can we make this all work – team effort
  + Shari O. – first touch and setup corp, Sean and Shay first hour or so, Sean helping to coordinate the next steps and pieces
  + Sean does a great job of reporting back
    - Report on things, record the notes, get back with us to help us keep pushing
    - Doing great with testing and prototyping
  + Kelly – who is on settings, who is on planning, maybe even looking at pre-deployment options
    - Before Kelly even does a demo, do some consultation – figure some things out without doing any pitching or selling. This is called listening.
    - What are you looking for, wanting, expecting, hoping for?
    - Make the demos custom to the pain points or key wants and needs
    - The prep work is huge to help them be successful
    - This platform is not a turn on and go type system – there may be pre demo, consulting, custom planning and demo, then custom hand holding to get them going down the road
    - Picking the point of contact… who is going to own this thing?
      * Owners, managers, and users
      * Users want the easy button – Steve calls this the tail wagging the dog vs the dog wagging the tail – what is and how can we get buy in?
      * Tools are great, but solutions to problems and pain points are even better
      * Give to get! If you give too much, it can get you into trouble.
      * What is the cost to fixing things… on the other hand, failing does help with major learning – there has to be a balance
      * We tend to remember pain – setting people up for success
      * Often users are looking for a quick switch. This system takes work. Please sell it that way.
      * Not going to custom too quickly – learning the manual way – then automating it
        + User buy in – light pain and then helping them learn a better way
        + Change proposals and scope of work – setting up boundaries
        + Feature creep – setting that scope of work – cause and effect of what they want and what they give – expectations and timelines
      * Sometimes I start with NO – interesting
        + A saying no - sandwich… Yes, I’d like to, no, I can’t. Yes, I would love to help do this… - people think that no is a bad word
        + Having a plan to say yes, vs just saying yes
        + We like to please people – that is awesome – what does that cost?
        + Help make the plan to say yes. Maybe, no (first), however we could do this…
        + Making things repeatable
  + What are the internal costs to do deployment?
    - Say $350 for a setup fee – does that cover it? If yes, great. If no, where does that put us?
    - Maybe on the setup, prep, an activation fee (define this – turning on the lights), setup and deployment fee (range), training, custom code, imports, labels, etc.
  + We like to cater to everyone – that had bitten us
  + Actual prices and then use discounts if needed. You can’t really ever raise a price after the fact.
  + Back-up our prices
  + Use adilas to run adilas!!! This is our communication tool, let’s use it.
  + We are good at the dreaming and software building part of things, we need some major loving on the service side
  + There is demand!
    - What pulls at our time - It is time, money, skills, etc.
    - Kelly – earn has to be more than burn
    - Flipping the demand to sales or services that could be provided
    - MVP – minimal viable product, plan, player, etc.
    - Intangibles

/////////////////////////////////////////////////////

Next Session – Show and tell! What are you working on?

Calvin – Advanced file and folder finder, resize images, convert images

Brandon – harvesting assets from element of time

Steve – parent attributes report, items not on a recipe (manufacturing), modal message marketing for customers, log notes for vendors and employees (payee/vendor logs), backorders homepage, mini units, auto add item (quick PO behind the scenes), bulk update on the vendor – master copy paster… 😊

* Branch 122 – fun

Bryan – cfqueryparams – stop SQL XSS (database hacks – cross site scripting) - SQL injection – converting from dynamic queries to secure dynamic queries

Example:

Corp\_id = #Trim(some form or URL var)#

Corp\_id = <cfqueryparam etc, etc,> 🡨 this stops the SQL hacks

Bryan is also working on eChecks for eXPO, Hypur checkout in the shopping cart (eComm), new API’s for delivery (with documentation and samples)

John – Payroll project to allow holiday date picking, timecard flags, timecard totals (pre summing the math to go faster and lead towards bulk payroll), new timecard reports showing grouped sums and totals.

Page templates and style guide defaults with Chuck – Going from old school tables and links to the newer grid and mobile ready code. Part of the adilas docs project. Build once, use many (effective copy and paste). Basic templates (3 new ones). New information icons and popups (modals). Style guides and usage of those pieces.

Servers with Wayne

Chuck – Huge new web site!!! Awesome Job!!!

Global Design Dashboard, adilas docs, and new presentation gallery (sales tool).

Danny – message marketing, custom labels, sales team meetings – hats off to all of us! Keep listening and keep finding solutions. Open table – follow your highest excitement and be yourself! Be happy!

Alan – enterprise level catalogs, refactoring code (custom page settings), standardizing code for speed and reliability.

Random comments – Cory really liked having access to all of the team members, right here at the conference. Marisa – great to meet everyone – keep floating the boat. Sean – he likes the team. Molly – loved watching and wants to be involved. Chuck – idea of everyone joining slack

////////////////////////////////////////////////////////////