1/31/22

Brandon, Steve, Cory, and Shari O.

* Steve was saying a 3-step process for sales – talk, demo, say yes (go)
* Get the cash flow going, then look at who is using the system and what they want – listening to our clients
* Not shy on functionality, shy on visual
* Brandon – football coach – Assume – Ass out of you and me (Ass u me)
* Admin roles – hire, fire, budget, taxes, balance sheet, P&L, annual stuff, monies and banks
  + Craig and Shari O. – balance sheet, annual stuff, monies and banks
  + Admin Team – hire, fire, budget, P&L
  + Time management – At least a monthly budget meeting. Watching cash flow. Shari O. was recommending at least once a month for an admin type budgeting meeting.
* What is our admin team and who does what? Steve, Brandon, Cory, and Shari O.
* We may be burying Shari O. a bit. – Cory has been helping her out. Price increases, server stats, end of the year stuff, deposits, follow-up on accounts receivable, training, etc.
* Talking about people and hours…
  + Some are ok with letting their payables stack up
  + Some could go down (number of hours per week)
  + Some would like to keep working and are willing to wait for paid work or funding coming in
  + What about sales, investments in time, investments in labor, investments in monies
  + ROI – projects will generate sales and will help with the resale of our services
  + Ideally, to talk to our guys and gals, it would help if we have a rough timeframe – 1 mon, 3 mons, 6 mons, etc.
  + Just an FYI – the new cost increases won’t show up until March and throughout the whole month of March. Permission was given to them (Shari O. and Cory) to help them round things as needed, with the new fees.
* Itty bitty look and feel pieces – bang for our buck
* We are planning a one-month transition period – raising prices, doing some trimming, and working on ROI stuff.
* Sales meeting have turned into more of a marketing meeting – We need to switch from a marketing role into more of a more sales mode.
* Covering current costs and back debt (repayment)
* Possible ways of raising some funds (the gap). Raising prices, focusing on paid projects, billing for our time (training, setup, deployment), etc. Steve was also talking about a refinance on his house.
* What about commissions? They are stacking up. We owe Kelly a bit. What do we need to do with those accounts and relationships?
* There are still some other Molly commissions. There are a small handful of accounts that need to be checked and looked into. Steve will be talking with Molly tomorrow afternoon.
* We have a couple of clients who owe us money. Who is going to talk to those accounts?
* Expense types… We want to call commission, commissions. It used to be called referral marketing. We also need to categorize things into sales, marketing, deployment, training, etc. Maybe create a new expense type for sales and deployment or whatever.
* Talking number of hats… Take any person and you will have multiple hats, within Adilas.
* Budgets for people or budgets for departments/areas?
* If we are doing sales – we can’t give big discounts and giveaway free training time. We have to keep moving forward. Next!
* Steve is going to talk to Sean about a sales strategy. He has been doing really good with deployment, training, and tech support stuff. Do we have a title problem – what to call what he does?
* Tech support is different than training… Quick couple of minutes or hours and hours on end.
  + Our system is complicated and requires training
  + They, our clients, have asked about user guides, videos, tutorials, online training, live training, certification, etc. All of that is education-based stuff.
* From Cory – A budget meeting once a month is the ideal. Say shooting for this by first part of second quarter. Until then, we may have to do some other things to make some major turnabouts.
* We need to shut people off – no pay, no service!
* Brandon – needs to send out the non-compete document and get with the developers. Trying to be creative. Express possible options.