Plans for working on the Pitch Deck - 3/12/24:

* Finish overviews
  + 5, 6, and 7
* SWOT analysis
  + Skim and pull out specifically the strengths and opportunities
  + That is what investors want to know
* Post-it note notes
* Lunch meeting with a guy discussing company structure:
  + What company culture are you pitching? Wanting?
  + Company’s culture - stable versus more open
  + We are master boot strappers - do we kind of pitch it as, this is what we do - it’s not shiny and all the way finished, but we have some great ability to get things done and help our clients. We draw on paper
  + Small history - a little bit fo the Adilas story - where are we now, where we’ve come from - and then pitch “Look at where we could go”
* Pitch deck our style
* WHO are we pitching to???
  + When you know WHO you are pitching to, it helps you better address your audience
* Introduce ourselves - who is the team - maybe related to the history pieces
* Versions, history - already have a graphic of different rounds and versions of this
* Ownership over time
  + Multi-member LLC
* Numbers
  + Clients
  + Monies in the bank
  + What our receivables are, etc.
  + Being able to show any further live numbers investors would be interested in
  + Showing/sharing the value of the company
  + That determines how much a percentage is worth
* Boot strapping
  + What will it take to go to the next level?
  + Automatic intro into level 1 and 2
    - Jellyfish model - company structure
    - Value add-on core - master plan
  + Overview of where we are going
  + Getting bogged down running the business - we’ve got all these dreams, but where we get stuck at is the day to day running the business, we don’t get to get to our dream part
  + Needing more structure
    - Team to run the day by day portion
    - Team or people’s to run in the dream realm
    - We can’t actively go to the dreams when all of your time and effort is stuck running the business - really want to improve our structure to allow for this
    - Maxed out with resources - we would love more resources to more actively pursue the dreams
    - Keep the core stable and functioning well - put more resources into forward building and efforts
* Pitch Deck. What makes us different?
  + Outline
  + Video
  + Print - further resources and links as interested
  + Create an outline of what we want to do for pitch deck
  + 2-3 min video per section??? Giving a visual piece for this pitch - links and print related to the video
  + Click in to where they are interested - if they want more resources and info, it is available to receive the further info
  + Potentially could use part of the web pages we are already building
    - We are already a web company - let’s use what we build to show who we are
  + Don’t want to stir up bees nests but want to share what makes our system so unique and valuable - so many different graphics, galleries, teaching resources - visuals and content that really teach so many of our underlying pieces and principles
* Potential
  + Where we can go
  + Where we can take it
  + Roll into planned projects 3, 4, 5, 6, 7, etc, etc.
* Could also at the same time be building out project 7 as we are working on these pitch deck pieces - these are related and can help build each other
* Use graphics, photos and drawings to illustrate the different points - we already have so much of this!
  + Prep any further graphics desired for a pitch?
  + Doesn’t have to be super fancy to just share some of the ideas visually
  + Use what we have - we have tons and tons of drawings captured and uploaded - the teaching gallery, lots of other places too
* Break things up into smaller sections, smaller videos, plan it out - don’t try to eat the elephant - break it into smaller chunks so we can help people navigate it or get through it quicker
* How to Win Friends and Influence People
  + \*\*\*\*Start here - what do THEY want to hear or know
  + This should inform where we go with our pitch and our presentation
  + This will help us get the most out of meeting with people - because we are meeting them where we are at
  + Use what the “fish” wants - what do THEY want - think in their shoes, what ways can you determine what THEY want or are interested in
  + Start with their questions - that can help us know where to start and know where to go
  + Start with what is important to them
* What would I say if I were pitching the things to someone
  + Scale - make it repeatable and easy to use/reuse
  + If I have a nice outline to follow with videos that are easy to use go further without repeating ourselves
    - Do I want to say the same presentation over and over again
    - Or do I want to come into a video and give an element of scale
    - Capture some of these pieces on the video so we have it over and over again
    - Can easily tweak and cater to specific needs from that starting point - make it personal
* Personal message
  + If we can already capture this, let’s capture this and make it personal
* \*\*\*Be our own style!!!\*\*\*
  + Show who we are and what we really have
  + Don’t spend time being what we are not, or what we don’t have - gaps and gains - need a balance
  + Have confidence in what we do have! We have so much!
  + Let’s start with what we have and what we are - then if we can see a clearer direction where we are lacking then we can build out further in that direction
  + Prototyping
* Simple drawings and wire frames
  + Allows you to go really simple and not worry about graphics, colors, full layouts
  + Just simple drawings to demonstrate ideas
  + Wire frames - glorified flow chart with more of the page flow
    - Start explaining things and it doesn’t hurt the design on the wire frame
    - Notes, call outs, etc. Glorified flow chart
* Napkin style overview
  + This is part of our style - we have done this more than a few times
  + We want to make it a little bit more than this - but this really is an effective way to get ideas across
* White labeling
  + This is a huge push for project 2
  + But this is potentially a place that investors that might be really interested in investing
  + If we have interest here, let’s find that and run with it
  + This can play into multiple of our planned projects and levels
  + 2-3 minute video
  + One little line on the outline could be expanded with a video of - “Look where you could go”
* Function over form (fashion)
  + We have a BUNCH of functionality
  + We are knocking at the door with the function level - we have so much ability to handle things
  + One the form level - this is really where we are seeing the need to switch
  + Function over form switching - if people can see WHAT we are already doing, then maybe we can generate the interest in working on more of the form to change it and make it nicer, easier to use, prettier
  + We are just chipping away at these pieces little by little because that is all we have the resources for - we need more resources to build out these next pieces
* SWOT analysis - focus on some of the things that are really important - from Bryan Dayton
  + Show where it can go - show the Strengths and Opportunities
  + Talk to some of the consultants and power users
    - What do you pitch
    - What do you sell
    - Why are people buying it
    - What do you think is important
    - Use the consultants sales skills and expertise
  + Also if possible talk to some owners and managers
    - Why do they use it
    - Why is Adilas important to them
    - Why do they keep with Adilas - what matters to them
* Notes from a walk Brandon took in the evening 3/11/24 and just some of the thoughts he had
  + Notebook that has things Tanner wants, options, Brandon and Heather had been discussing things when they had been on a walk earlier from 7/21/23 - from this they wrote the doc for Tanner on 7/24/23 - some memory lane
  + The entry after that 3/11/24 - a month after Tanner passed away referring to the previous notes of how to set some rules and expectations
  + He would push the rules so we decided to put them in writing
  + Planning pitch deck ideas - 3/11/24 - how to make a pitch deck to share some shares or grow Adilas LLC
  + What do people want to know????
    - Help them get that info easily!!!
  + Make our pitch deck online with graphics, videos, and printable information
  + Immediately after writing make a pitch deck - the very next point is the THEY
    - What do they want - we are fishing for worms instead of strawberries and cream for fish example
  + We can start putting everything we want to link to and what we build in project 7
* Adilas Lite
  + Project 7 already has a bunch of other stuff or places to hold so many of these pieces we want to work on for the pitch deck
  + Let’s build these two at the same time
  + Number 1 and 2 on Adilas Lite
    - These are our current next steps - the next phases we see to happen first
  + Then next ones 3, 4, 5, 6
    - More long term goals - need more funding
    - We can capture our business plans in 7
    - We can capture and share all these videos with number 8
  + Would love to get going as quickly as we can with 1 and 2
  + Helping us see where to put this all together
* Next steps
  + Finish overviews
  + Make the outline for the pitch deck
    - Determine what we want to make it consumable for sharing, but make sure that we get the pieces we want to capture
  + Then we can determine where to go next
    - Videos
    - Written content
    - SWOT analysis

3/21/24

More focused pitch deck outline pieces:

Pitch Deck Simplified:

* Outline
* Videos
* Print

Audience:

* WHO is the target audience?
* WHAT is the goal?
* WHAT do THEY want?? Answer their questions - what do they want. They can always come and ask for more

Presentation Order Ideas:

* History to present time
* Next level
  + Show POTENTIAL of where we can go! Share the VISION!
  + Jellyfish model - improve company structure - need
  + Value add-on core - \*\*\*The Master Plan\*\*\*
  + Share the next projects - 3, 4, 5, 6, 7, etc.

Visual needs:

* Graphics
  + Versions over time - Fill in the map and GPS core graphics as it grew
  + Team member intro?
  + General numbers and revenue -
    - General receivables
    - General operating numbers
    - Invoices over the years, etc.
* Videos
  + 2-3 minutes videos for each of these pieces
* Printable resources
  + Make the key info printable
  + Access to so much further if desired - developer’s notebook, huge amounts of data and content
* Make it web based & use what we already have
  + New graphics/icons on those main project, overview pieces
  + Fill out Adilas Lite if that is what we choose to use for the pitch deck
  + Make a new section for - investment opportunities
  + Links to other visuals, galleries, underlying concepts and pieces, teaching tools - may want to make some specific docs - like “What Makes Us Different?” - make it it’s own doc so they can read, access, print
  + Presentation gallery outline - already has a lot of content there

Strengths, Challenges, and Opportunities:

* Strengths
  + Stable functional core - over 20 years - we are not short-lived, we’ve been around and we are going to keep being around
* Opportunities
* Challenges & Opportunities
  + Getting bogged down in the daily business details of running the business - where we want and need some help - so we can keep dreaming and building and doing what we are best at
  + Need managers, need dreamers, need builders
  + Need more resources - resources maxed out