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

3/26/24

Notes from a few of the meetings and things that have happened even just this week. What do we do with some of these pieces that keep playing into the mix??? How do we want to handle all of these other pieces???

* Custom Code - our superpower and our Achilles heel
  + We were discussing all the meetings Brandon had just this week for the doggy parlor, the frozen yogurt, and the golf club
  + All of them need advancements for POS and calendaring and they are seeking us because we do custom code
* We may need to still follow both paths - meaning following some of the custom pieces and people that want to play while figuring out how to balance not chasing every little carrot on a line and focusing on establishing some boundaries and limits, and figuring out the right balance to play that out there
  + We may need the custom code piece - it does play a role in helping us to keep going
  + What boundaries and limits do we need? What focus do we need to keep on the bigger picture of moving forward and building
* \*\*\*Freedom within bounds and enough rules that we can keep it within the navigational beacons but we can still enjoy having a lot of freedom and the things we love that keep us going and dreaming\*\*\*
* There is an aspect of having to keep things compatible with WHERE WE ARE AT RIGHT NOW
  + Of course in the future, if we had more resources, then we could make other decisions but at some point you have to play where you are at
  + Start where you are at
* Lack of structure can become really draining
  + If you don’t have enough structure it can be exhausting to keep pioneering
  + There has to be some kind of boundaried, limited, at some level - even if it is a large, boundaried space - to help make decisions that will help us be successful from WHERE we ARE at to where we want to go
* Company’s are generally looking for a finished product
  + We don’t have that
  + We are trying to chase the money or the potential projects
  + That does get us closer….
  + But we are not finished
* Without having a written plan our plan really has been - Chase the $$$
  + That really is what business is - there is nothing wrong here, this is part of the whole process
  + This is what has led us - it’s just become so free form that it is a bit too chaotic
  + Need some further parameters to help us get more focused in the general direction
  + But we don’t want to lose this all together - this has continued to get us farther and farther down the road
  + When it’s so chaotic, we aren’t totally sure where the “road” is going
  + The chaos and randomness is going to force some cleanup, trimming some of the pieces that are out of bounds or not where we want to head
  + We need something a little more structured for where we want to head
  + \*\*\*Unspoken our plan has been - Chase the money\*\*\*
* We can live in dreamland, prototype land pretty much all the time - but meshing or marrying that with the more structured running the business portion - that creates some difficulty for us - so figuring out the way to mitigate or navigate that
* We don’t know exactly all of the pieces but the business plan we have followed - chase the $$$ - really has been working in many ways
* We have trained our guys to be pretty good virtual pirates within our own system - meaning what can I commandeer, take over, borrow from other ideas, code, or pieces of what we have already built
  + This is not authorizing plagarism - this is saying, what can we use that we have already built - where can we reuse these same pieces
  + There are still rules, even within letting them take over different pieces from our system
  + This can cause it’s own problems, some of the developers have not understood the rules of what you can take, what you can’t, and how to play these pieces in the right and appropriate ways still
  + This cannot be a free for all, there still has to some order/structure
* Demo Client (phantom clients):
  + Are we so desperate for a yes from a potential client that we get tempted/pulled into further development and meeting all of their needs even just for them to say yes
  + Unknown needs
  + We sometimes spend so much time trying to reach these false summits for “potential” clients, that are just maybes, unknowns, and by the end we have invested so much and they still feel like that wasn’t all the pieces they wanted, they aren’t going to go with us
  + Sometimes these start at $5K and we think that would be worth it for this customer or industry, but by the end they keep raising the summit and it costs $60K and we still don’t get the client in the end
  + Too heavy of lifts, unknown, under time constraints, phantom clients - these aren’t real, actual paying participating clients
  + This can also get us in trouble in multiple ways - sometimes with the code too, we sprint, we try to appease them and it just keeps going but we don’t have a stable coding base trying to throw this together so fast
  + It is so often harder to claim or reclaim a client than to keep and defend what we already have
  + Much higher risk factor - with this illusive carrot that really tempts us
* Paying Client:
  + When we have a client that we already have - that is paying and playing and they want a potential new feature, client - that is a good carrot, that is a good project most often
  + They are often willing to invest monies, they are already participating
  + These carrots are more real, they often are willing to invest more monies, or sometimes we see how it can benefit all of us and we are willing to take that on ourselves
  + They have needs but they are already invested with us
  + It is so much easier to maintain and defend what we already have instead of trying to claim and reclaim new, unknown clients all the time
* Maybe if we want to keep seeking new clients with custom code - this may be an area we really need to boundary and define
  + Maybe we only have a certain budget we will allow
  + Maybe we only allow certain parameters
* Overall - our takeaway here is how much better it may be to invest in our current clients than chase and use all our energies and resources chasing the unknown, potential client
  + We still want to grow and capture more of these potential clients - obviously - but how can we do that by focusing on a better plan and supporting first our own clients???????
* Sometimes we feel like we are in the perpetual eddy on the river - the hydraulics on the river
  + To cross that you have to come in with speed and the right angle, so that you can effectively get across
  + If you don’t come in at the right angle you get stuck, sometimes you miss the whole chance, you get stuck in the swirls and the hydraulic
* Another analogy - two runners that are going to run a race or distance
  + One flops on his shoes, doesn’t tie them - he can get started faster but is flopping the whole way - how effective, how well can he run?
  + The other takes the time to put on his shoes, tie them up, prepares to run the race, he has taken the time to be able to run a better, more effective race
  + I suppose this depends on where the end is - if it was just a few feet, maybe the faster guy would benefit but if you can’t see the end, the guy who took more care will go farther, better, more efficiently
  + This was a thought as we were discussing some of the differences between how tempting it can be for us to try to chase the demo client carrot
* When the zone/area of coverage is too big, expansive, undefined - we all get pulled in every possible direction and it is exhausting, overwhelming, and you just can’t keep it up
  + It kind of feels like group soccer, or one man soccer
  + Playing too much of the field - we need to better define what zones we can play so that we can better keep up with playing the game
* Once you have hit or gone through multiple breaking points - you start to realize there is a need for change
  + We build and break and build and break

3/28/24

Going over some of the changes from even just the last two days since Tuesday. What we talked about on Tuesday with chasing the potential client carrots is playing out right now! This weekend! Trying to see if they can get some functionality done for a demo by next Monday.

* One post-it note from Brandon:
  + A client emailed Brandon and said, because you can combine CRM, POS, and accounting that helps set us apart
  + Here are his words, “Most software providers only focus on one or two different systems, but Adilas is able to offer many of the major systems for CRM, POS, and Accounting. The ability to efficiently integrate and link these systems and more is definitely a competitive advantage of the company.”
* Needs:
  + Intro to Adilas for Adilas Lite and the investment opportunities section
  + Succession - looking for the next generation - who is going to pick up the torch of Adilas
  + Where we want to go and help: sales, training, building/coding,
  + What level do people want to play at
* We are a general business tool with tons of potential!!
  + Adding these custom skins, white labeling, etc. is within range
  + We are hitting 85% of people’s needs right now without doing anything custom - that is huge!!
  + Can we help present it in this way more
  + And that can help define adding further pieces for other clients
* Able to customize and mix and match - grow with you!
* Tell the story and harness the older assets
* We may have to piece-meal plan this thing
  + We doubt highly we are going to sit down and have the full meal
  + We will probably still be snacking, grabbing food as we can, planning as we can - this is where we are at
  + We are hoping to get wiser about how we approach this but we are still going to be doing a lot of the things that have gotten us this far
* Allow for investment of all kinds of things
  + Could be money, time, ideas, in kind, etc.
  + Open this up
* Define the financial products that we are willing to do
  + Loan
  + Buying shares
  + Sponsors
  + Investors
  + Mini mall, new sub division - selling lots or “real estate” level idea

This was just a quick brainstorming session on if we were going to buy a house, what would we do - this is to help us think about what investors are looking for with Adilas

* Buying a house
  + inspected, professional inspections,
    - under the house,
    - attic,
    - be there herself, bargaining tools,
  + price,
  + walk the property, overall quality,
  + future potential,
    - will this return something,
    - what do i need to invest to get it turned around, location,
  + suite the needs that you want for the property,
  + taxes,
  + neighbors,
  + zoning,
    - local rules (community),
  + research,
  + environment,
  + closeness to other things,
    - accessible range,

What does the above brainstorming for a house translate to when buying a SAAS company:

* Buying a percentage share or investing in Adilas
  + Inspection
    - We don’t have a professionally audited company but we are open to that if someone wants to pay to have that done
    - No official appraisal but there are some general rules of play here
    - We welcome people checking it out themselves, push and play on the different parts and pieces
    - Want to see every little piece you can see or are interested in seeing
    - People are welcome to come and ask questions
    - We can provide numbers for overall financials
      * Who has spent what to use our system
      * Share transaction data
      * Our revenue history and data
      * We haven’t even marketed or advertised this and this is still what we are doing, accomplishing, or the level we are at
      * The potential here is huge! We have done all of this by word of mouth, how much faster could it grow with some advertising, marketing, etc.?
  + Stats - just some ideas
    - Pick a specific date to show or run it dynamically?? We are a web company we can do whatever we want
    - Same with servers - show what data is happening in real time
    - Summary stats
  + Financials
    - Basic financials - where we are at
      * Includes: banks, cash on hand, what is the cost to operate, who do we pay, monies owed, monies expected
    - History - where it started and where we have come from
  + History of company
    - Versions
    - Ownership
    - Servers
    - What has played out over the years
    - Small little tour - walk the property, overall quality, patterns, diversity - maybe even show some of the custom, the different look and feel and varieties, eCommerce, showing them in a way that we have the engine and what it looks like on the front can be so different and variable
  + Future potential
    - ROI
    - Plans and potential for investors (we may need to figure out some of our own plans here, so that we can better define how we want this to look and what can still benefit all parties) - (a percentage of gain on the gain was an idea Steve had - lots of creative ideas have been thrown out here, need to define it)
    - Set some rules and parameters for investment - what level do they come in at??
    - Benefit scale - depending on level of investment, what options come with that
    - Share the vision - Here’s where we are at, here is where we are headed
    - Pro-forma? - futuristic projections - maybe even allowing them to interact with pro-forma inputs??
    - We are a sleeper in a way - SO much here - how can we share and show that??
  + Open to input, suggestions, and what our investors (audience) are thinking about this
    - Who gets a say
    - What do they have an interest in and how open we are to listening and looking at options?
    - How can we help you get your questions answered?
  + Adilas team and current company structure
    - What are co-owners responsible for?
    - If you’re 20% or higher, there is more ‘exposure’ or responsibility here but… we want to make this as simple as possible
  + Research
    - Developer’s notebook
    - YouTube channel - not categorized but hundreds of hours of captured training
  + Standard for most businesses
    - Is to have 4-6 business software options that people are trying to marry together, we can play as one of these options but….
    - We offer a systemized approach - everything you need all in one system! This is really where our greatest power can be.
    - Other places we really shine are people with: multiple locations, high data integrity needs, love details and technology, highly regulated industries or pieces, ability to document and track data so well - people who love high levels of data love this product!
    - We are together - integrated - an all in one solution! We worked to systemize this thing which has really made us different.