Working on Core Concepts Presentation Gallery Verbiage

From the Core Concepts doc: doc\_171234\_ADE0186656.docx

Going to make our progress live so we can work from current Presentation Gallery:

1

**Capture & Record The Story**

* Centralize the data
* Empower the users
* Capture the data at the point of usage
* Date and time stamp everything
* Enter once, use many
* Translate real life happening into digital recordings
* Spend the time and try to get it right - try to complete the whole circle, complete the story, get all of the pieces that you need - get all of the details
* The story brings clarity to numbers - if you capture the whole story the details end up cascading down and will bring clarity to what is behind the numbers
* Capture: What does this mean? It says I’ve got a snapshot, you can replicate it, you have it, you can recreate it
* Record the story: There are dates, times, events, actions, reactions, transactions - there is some chain of events that occur and happen, capturing the causes and effects
* Digital office, paperless office, put it on the web, make it cloud based, show what you want, hide what you want - all of your pieces in one place
* This is “what” is happening & “when” things are happening
* This is “why” we are doing this - to capture and record the story - to create a data tracking system that knows what is going on - to simulate your world and capture all of the relationships, cause and effect scenarios, to recreate what is happening in your business

Working on sub title headings:

Work on content for these modals:

* Capture - the how and when
* Centralize the data
* Enter once, use many
* Date and time stamp everything
* Real time data entry at point of action
* Record the story - the what and why
* Understand chain of events
* Track cause and effect relationships
* Bring clarity and meaning to your numbers
* Translating real life happenings into digital recordings
* What have you got?
* How do we help you organize and figure things out?

(recording, inputting, processing)

Recognize, acknowledge, appreciate, know, monitor, track,

Replicate or recreate the data

2

**Groups, Players, Individuals, & Characters**

* Technically, inside of Adilas, we have 12 main player groups - customers, invoices, quotes, vendors, POs, parts/items (general inventory), stock/units (serialized items), deposits, expense/receipts, employee/users, balance sheet items, and elements of time (calendaring and scheduling).
* Each player has a personality of sorts - things they do, things they are good at, things they are responsible for that no one else is, etc. They help with relationships and function in a way to help hold the story together. They maintain different pieces of the puzzle. The details of that person or player, their interactions, where they go, what they do, and how they act are all part of that player. Each one carries their own virtual story.
* Locations and sub-locations help track where people or players go.
* Sometimes people or players even have traditions, cultures, different groups, different ways of interacting, etc.
* This is the “who”, “what”, and “where” at play.
* Groups: This is basically a collection of like things. For example: A player group - like all of the invoices - they all have a common goal, thread, purpose, something that binds them together. Groups can also be where things are located relatively. To be a group you usually have a common thread, a common make-up, a common location, something that puts you in a group.
* Players: Imagine a player in a game. This means that that a certain player is playing through or playing part of a game. Players can be in groups and form a part or piece of the bigger whole. You are involved, you are doing a role, you are a participant - you make up part of the group. Just being silly, there is another term for players. This kind of player is usually someone who is strategically playing a field of some sort, be it dating or sports or whatever. They are a player. All kinds of players.
* Individuals: Every individual has a name or id, it is part of a bigger group, you could have one, many, etc. You start getting into each thing being unique, you get into personalities, strengths, and weaknesses, details, opinions, history, and baggage. Lots of possible details and sub details per individual.
* Characters: What is the difference between an individual and a character? A character is someone you know that has specific characteristics and it starts getting into relationships. Characters in a way – tend to be people or players that are part of a movie, or a story, and it starts being personalized. A character sometimes takes an individual to the next level and helps you get to see them in the context of a story, or a relationship, or related to the role that they play in accomplishing something.

Change Title:

Application Players --- or --- Parts of Your Business

Sub points headings: The 12 Main Players

* + 1. Customers
	+ 2. Invoices
	+ 3. Quotes
	+ 4. Vendors
	+ 5. PO’s - Purchase Orders
	+ 6. Items - General Inventory Items/Parts
	+ 7. Stock/Units - Serialized Inventory
	+ 8. Deposits
	+ 9. Expense/Receipts
	+ 10. Employee/Users
	+ 11. User-Maintained Balance Sheet Items
	+ 12. Time - Calendaring and Scheduling
* Do we want to leave this page as it already is? It already has the 12 main players listed but in a different order than we changed them to on the Application Players page. Do we want them to match or does it matter????

3

**Relationships**

* A relationship is where something happens, and it is usually tied directly to an individual or a character.
* Relationships have a dimension to them - either a one-to-one, one-to-many, one-to-many-to-many, or something else.
* Defining a few relationships - you can have: a parent - child, siblings, friends, enemies, good guy - bad guy, teacher - student, mentor, accomplices, big guy - little guy, twisted ones with intrigue, symbiotic relationships, toxic relationships, multi-level relationships, bosom buddies, associations, etc.
* So, what do we do in business? We start connecting things. We have natural relationships and also forced connections and forced relationships.
* For instance, items are tied to invoice and quotes, and quotes and invoice are tied to customers, but they also create payments which then ties an invoice or customer to a deposit, then deposits are tied to banks and banks are tied to financials - cascading effects and relationships. You get the idea.
* What connects to what and this ends up being part of the “Why”. Often in a story, not everything happens at the same time, there may be a “when” and a “how” and other factors involved.
* What’s the value of a relationship? If I just have A and B (super simple and they don’t interact), maybe not that important. But if A loves B, or A effects B in a certain way, maybe that starts to make a difference. A relationship get started or created.
* A relationship can be pre-set, forming, evolving, diminishing, decreasing, or whatever. There tends to be an element of motion, it is not a locked thing.
* Relationships take work and effort. If they don’t get the correct amount of work or effort, it can effect other relationships, or change the dynamics in other relationships. It can also bring in new, and other players, these relationships change the cause and effects.
* Relationships are incredibly rewarding and essential. As things get mixed together they can become richer and fuller. Relationships help us meet needs and accomplish more than any one individual can do on their own.
* Certain other relationships can also create drag and degeneration, less effective outcomes. Some relationships may be negative influences.
* Relationships exist on all different levels - there is depth to a relationships, sometimes there are both seen and unseen relationships, sub-relationships, etc. It can get pretty deep.
* So, with all of these relationships, how are you going to track all of this? This can get pretty deep, pretty quick.

Possible Sub Headings:

* + Types of Relationships:
		- Natural (Typical) relationships - I.e. customers to invoices
		- Unusual (Atypical) relationships - I.e. customer to purchase order)
		- One to one relationships - I.e. customer X to invoice 13
		- One to many relationships - I.e. customer X to all their invoice history
		- One to many to many relationships - I.e. customer X to all their invoices and all items ever purchased
	+ Track and Manage Relationships:
		- Everything time, date and user stamped
		- System histories
		- User histories
		- Create your own unique relationship ties
		- View reports for all relationships

4

**Trouble, Problems, Needs, & Goals**

* If you are not trying to overcome anything there is no reason to do anything. This can create a uniting goal, a background drive, a reason to do something.
* Pain in another huge motivator. What bothers you? What takes your time? What do you have to do over and over again? How can I overcome this thing that is a problem or bad?
* Sometimes your pains or difficulties are driven by government, government requirements - reporting, taxes, collections, various things to lawfully stay in business.
* What do you want? Hardly ever do you get something served up to you that is perfect. We have to do something to it. Blend it, mix it, chop it, cook it, or whatever. It is not ready or perfect in it’s natural state. You have to work for it to create the useable thing you are seeking/needing. People have to make food, people have to work for materials that can be used, people have to build things. Mining, refining, building, destroying, adding, subtracting, tweaking, inventing, defining, selling, and the list goes on.
* Constantly a need to input some kind of effort into all things we want to attain in life.
* If you have a business, Why are you even in business? There is a need, a goal, a problem that you are trying to overcome.
* Trouble: What does trouble mean? Trouble could mean: I could get punished, penalized, I have certain rules, requirements, I have to comply with set standards, I should do this or that, or I shouldn’t do this or that.
* More on trouble: Could this or that affect us in a way we don’t want? If the trouble is bad enough, you may need a superhero - someone who can handle the trouble you are facing. Just being silly, but Adilas could be the superhero to overcome your business troubles.
* Back to pain or forms of pain – pain is one of the greatest motivators - we will do almost anything to overcome or get out of pain.
* Problems: The word “problems” doesn’t sound quite as bad as trouble. I am not in trouble yet, but I have a need.
* Problems almost seem like a pre-trouble situation, or a predecessor to trouble. There needs to be a plan, an attempt, an approach to solve the problems. Sometimes problems can recur or be reoccurring, they can become a pain and something that we want or need to overcome.
* Needs: When I think of a need this could be a requirement, possibly a want, I could be lacking something, I could have too much, I may have to fill in, substitute, buy, sell, or have something to make up the whole. A need is more of an expression of the desired outcome.
* A need could also be a basic requirement, at a foundational level, that sustains life, that sustains functionality. Things that if you don’t have you don’t move forward or continue existing or keep growing, progressing, functioning.
* There is an element of perception to a need. Sometimes it can just be in your mind. Ask yourself this question, is it actually a need or is it a want?
* Goals: Goals mean there is a dream, a want, possibly a plan, a desired outcome, a desired prize/result. There might be steps to achieve these desired outcomes. There might be steps, checkpoints, ways to get to the desired outcome. Steps to overcoming your obstacles or problems.
* Sometimes you are trying to stop certain things, start certain things, continue certain things (start, stop, continue). Making a plan to achieve these outcomes are called goals.
* Goals can and should be measurable, there can be little pieces to get to bigger pieces. SMART goals - Specific, Measurable, Attainable, Realistic, Time bound. Goals can be fun and very motivating too. They could be reoccurring, could be a one-time thing, or even a far off dream.
* Oft times there is a reward or prize for attaining your goals. If there is not a prize or a reward - maybe you should think about adding one. Motivate yourself and your team!

Title: Navigating Challenges & Achieving Goals ----- or ------ Solving Problems & Meeting Needs ----- something like unto these??

Possible Sub Points for Challenges:

* Expansive (Extensive) Business Tools
* Integrated System
* \*Robust Reporting
* \*Permission Based
* \*Audit Tracking/Trail
* \*Employee Accountibility
* \*Complete Transparency
* \*Various Export Formats
* Business Intelligence Decision Making (Aggregate Data Summarizing)
* Custom Coded Features/(Additions)

\*Already on the page

And………..

Goals: Originally Needs & Goals

Title: Dreams & Plans ---- or ----- Meeting & Exceeding Needs

Possible Sub Points:

(He had basically relisted the core concepts here as the 12 points)

New Proposal

* Inspire Dreams
* Address Needs
* Determine Wants
* Motivate Vision
* Reward Effort
* Specific Plans
* Measure Progress
* Attainable Growth
* Realistic Outcomes
* Time-Bound Assessments

Notes from content above:

What do you want?

Input - necessary

Must put in effort to to achieve something, change things

Why are you in business? What are you wanting to accomplish?

Needs

How to continue growing, progressing, and functioning

A dream, a want, possibly a plan,

Steps, checkpoints, plans to overcome problems and reach desired outcomes

Start, stop, continue various things

Goals can be fun and motivating

SMART goals - Specific, Measureable, Attainable, Realistic, Time Bound

Reward

5

**Decisions & Choices**

* Decisions lead places. We are constantly faced with them whether we realize it or not, but we are constantly making decisions and choices. They affect our relationships, they have causes and effects.
* Are you going to buy, sell, fix, hold? Are we going to skimp, are we going deluxe, are we going to bootstrap, are we getting outside funding? Am I going to respond? Am I going to get mad, frustrated?
* Even though different jobs have different descriptions what you are doing is linking different decisions and choices together. Then new decisions come from those interactions or previous decisions.
* Sometimes a certain bad decision leads you down a path, and then if you keep making bad decisions, it can lead you to a different place (good or bad). Not all bad decisions lead to bad places. The same is true with good decisions.
* This is one side of the coin – Hypothetically, what if you where to make good choices and keep making good choices What happens then? It could be that people want to help you and be around you, and work to help you progress. There are different momentum paths you can create because of the decisions you make. Once again, momentum can go in both directions. Be aware of that.
* Sometimes we get to choose things and sometimes other people choose for us. We are not fully in charge of everything.
* A lot of the time people want to help us or try to help us but we may not allow help. Attitude can make a huge difference. We could make the exact same decision but depending on the attitude we approach it with the outcome can differ greatly.
* Sometimes other people’s decisions can cause immense unfairness. Or sometimes our own decisions can cause unfairness to ourselves and others. Often things happen that are no one’s fault, it just happens, and can cause or create unfairness.
* If we are in a certain circumstance, we may make a choice or decision differently. Or sometimes certain circumstances almost force certain decisions. This deals with an element of control. Are we controlling the situation or is the situation controlling us? In business, sometimes the state or government says you have to do this or that. It is very common, as well, that a boss or manager may say certain things that become required or expected or demanded. Circumstances can get tricky.
* Sometimes we make a rash decision that might be the best thing for the scenario or circumstance. Is that your typical decision making process or was this a special case?
* You are going to need a bunch of good coping skills or tools. Things happen and you will need to have a way to respond. You still get to choose how to respond to things.
* Sometimes we make decisions on what we think is going to happen. Decisions and choices, you are calculating risks, rewards, benefits, etc. Reality versus perception is huge but affects our decision making.
* If we make choices and decisions, you are going to have consequences and accountability as well. These things come with the territory.
* Inside of Adilas we do this all the time (allow for decisions and choices). These really start to add up. Think of how many choices you make in a day. It is a summation, or an accountability of the summation of these choices that forms the outline, flavor, nature of your world, life, day, etc.
* When you are living, this is what you are doing, constantly making decision after decision after decision.
* Sometimes we add a scale, weight, or relevancy on those decisions. Such as this decision is a really big or important one. There are also those decisions, even if they are small or tiny, that keep coming up. These continual decisions really add up to even more than some of the big decisions.

I think this one also a part of Cause & Effects??? Notes below….

6

Consequences (Cause & Effects)

* We might often think of consequences as negative or bad but they do not have to be. Consequences sometimes get categorized as negative. But not all consequences are bad.
* Consequences usually lead to the next decision. It creates a web and a connected structure as you make further decision and they bring other consequences. They effect relationships.
* There is a balance to consequences. Is it a natural consequence of the action? Is it an unnatural or unrealistic consequence to the action? Certain consequences or actions of other people can really alter how we respond. Choices and consequences have cause and effects.
* Trust levels - certain things add to positive trust levels, you can build that by the drops. But you can also lose trust levels very quickly, typically much quicker than you can build it.
* Some businesses live and die as a consequence of the actions or choices taken.
* Sometimes these cause and effects can have time frames, gaps, sequences, patterns. There is also an aspect of time with consequences. Some consequences are delayed, some are forced, some are inevitable, some are negotiable or can be altered.
* It is amazing how quick we can change - cause and effect - depending on how people respond to choice, consequences, proactive on consequences.
* People can look at predictive or responsive consequences. If I do this action, then I plan for this outcome to occur. We start projecting pieces and trying to work for that particular consequences. So not all consequences are just a result of decisions - you can also take a proactive approach and work for consequences you want - like goals. This ability to look ahead is a powerful resource we can use in our decision making and working toward desired consequences.

Title: Business World Building - The Sum of Choices ---- or ---- Decisions Determine Outcomes

\*\*ings or non-ing endings????

Possible sub points:

* Allow For Choices
* Decision Making Processes
* Recognizing Patterns
* Responding To Circumstances
* Calculating Risks & Rewards
* Intended Goals & Outcomes
* Directing Momentum
* Flexibility & Level of Control

Notes just from reading these previous two sections - maybe these phrases can help spark our minds as to what flavor we want the sub points to have on this page….:

Decisions & Choices section notes:

Decisions have consequences and effects

Decisions = momentum paths

Choices we can control and choices out of our control

Momentum can go in either direction

Attitude and intended outcome/vision

Certain circumstance can force certain decisions

Decision making processes

Chosen responses or choosing how to respond to challenges and decisions

Calculating risks, rewards, benefits

Reality or perceived reality

Consequences and accountability

Allow for decisions and choices

The summation of choices builds your world

Weight and relevancy of decision making

The life and death of a business, or relationship

Time frames, sequences, gaps, patterns,

Time - how does time play into this - forced decisions and consequences, inevitable, alterable,

Predictive or responsive outcomes

Decision working toward desired outcomes

Consequences (Cause & Effects) section notes:

Relationships - Natural and Atypical

Decisions

Decision Making Processes

Consequences

Results

Linking Decisions & Choices

Momentum

Responding To Circumstances

Levels Of Control

Tools & Skills (Coping/Responding)

Flexibility

Ability To Respond

7

**Accountability**

* What happened? Why did that happen? When did it happen? How often did it happen? Invitation type level - who, what, when, where, why knowledge and accountability.
* If there is a decision made, then a consequence happens whether positive or negative, then you are accountable, responsible for that decision and its consequences.
* Who wants to know? Why do I care that they want to know? Do I need, or want, to report to this/these persons. Are there consequences if I don’t do so? What authority do they have?
* The story really becomes important for accountability. A number has very little meaning unless you understand what led to those numbers, what underlies this data, where did it come from, how did it happen, what are the pieces that build the story and give us accountability, or an accounting of what has happened.
* Accountability - an accounting - accounting for what happened or occurred. If you talk accounting maybe you just get caught up in the numbers and having to report taxes, etc. But when you think about accountability that is associated with decisions, who did what, who does that effect - what is the story. The accountability seems to take on a richer, more full, meaning of capturing all of the pieces, information, happenings that are contributing to the outcomes, difficulties, troubles, consequences you and/or your business is facing.
* Often accountability could be verbal, on paper, visual, etc. Does this increase the general intelligence? Increase the business intelligence? Can people make decision on what they are getting back from the information?
* There are times when people want to show and share what they are doing. There are other times people want to hide, scatter, be sneaky or stealthy with their actions or behaviors, only show pieces they want. As a business, or a business owner, it is so important to be able to have all of the pieces, to be able to investigate or see what is really happening. This is called transparency.
* Histories - the act of recording what happened. We capture and record histories because this becomes like a background security system - who does what, who touched what - almost like hidden cameras that are helping keep track of things. It doesn’t take any special input or actions. This is automatically captured as people login and touch things and interact in the system.
* Sometimes you may want to tell people about the automatically recorded histories, sometimes you don’t. But admin has access to all of the histories and you can allow or deny access to that information in your system based on permissions.
* We may know what should happen or what we want to have happen but so many times in decision making we forget to access all of our knowledge, or think through what the potential consequences may be. It is hard in some circumstances to focus and use your acquired knowledge to make the decision you really want for the long term.
* All of these concepts are intermingled and intermixed. They all play a part together, they effect each other, and bring about other pieces. All tied together.
* There is also an aspect of a long term, cumulative accountability that we all have to face, either to ourselves or a supreme being. We all have an accumulation of things that we all have to be accountable for. Accumulation of choices, things, intent, the story, the patterns, all of these are important pieces for accountability.

Possible sub points:

* The Who, What, Why, When, Where, How
* Employee History & Accountability
* Responsibility For Decisions (Actions)
* Understanding The Story \*
* What Creates The Numbers \*
* Admin Access For Histories & Records
* Informed Decision Making
* Capture Patterns & Trends
* User Based Access
* Extensive Audit Trail

\*These two are pretty similar - or well related

Notes/phrases from reading through section above:

Employee & User Accountability

Reporting

Responsibility for decisions

Understanding The Story - what is the story

What Underlies Data, what led to the numbers

Who, What, Why, When, Where, How

Informed Decision Making

Business Transparency

Capture All The Pieces - know what is happening to make a more informed decision

Recorded Histories

Admin access to all histories/records

Patterns, Trends, Long term and short term accountability

Authority to track, record, know, hold accountable

Some additional content at: data0.adilas.biz/old\_index.cfm

<https://data0.adilas.biz/old_index.cfm>