

 *Erik Gabrielson* - **00:00**

Came into town on a, like last second and I think they're down doing a college thing with Kieran because it's like Mea weekend.

 *Mojo Solo* - **00:15**

Yeah.

 *Erik Gabrielson* - **00:16**

So they had the day off, so he's doing a tour. University, Utah today.

 *Mojo Solo* - **00:22**

Oh, cool.

 *Erik Gabrielson* - **00:24**

Yeah.

 *Mojo Solo* - **00:26**

All right.

 *Erik Gabrielson* - **00:29**

How are you?

 *Mojo Solo* - **00:31**

Good. So you had a good meeting this morning?

 *Erik Gabrielson* - **00:34**

Yeah, it was great. This guy connected the dots right away and he, what he does is he is a manufacturer's rep, for lack of a better term, helps manufacture retailers, specifically kids toys and other types of athletic products into Target and Walmart. And so they have a whole channel there. They have their own manufacturing business and they're going, gang, he has 100 products that he represents inside target and 1000 products total.

 *Mojo Solo* - **01:13**

Wow.

 *Erik Gabrielson* - **01:14**


And so right away he's like, holy shit. He's like, we do weekly forecasting for every one of our products based on the previous week. And he said, I could do this and to send it to India, but I don't want to do that because all my reps, they pride themselves on knowing what's going on when they're talking to target and Walmart, and so they want control of it. But to be able to do the, have the AI do the forecasting, he said that would be number one thing. To solve the second thing, he's like, we have hundreds of presentations and everyone's got their different things and I want it all in one place. I'm like, oh, well, that's interesting. And then project management, so he's quite excited.

 *Erik Gabrielson* - **02:05**

And so the next step is for you and me and Julie too, to get on a call and just understand the forecasting thing better and then be able to come back to him with some ideas around proof of concept or, I mean, but this. And he goes, and I want this to help my team better and to support them. And he gets the whole, the holistic approach. So it was a really good call. Wow.

 *Mojo Solo* - **02:37**

That'S awesome.

 *Erik Gabrielson* - **02:38**

Yeah.

 *Mojo Solo* - **02:40**

So, wow. We have so many opportunities to respond to and stuff, which is good.

 *Erik Gabrielson* - **02:50**

So then the other thing, just logistically, Julie was hoping that, I said we don't have to be there till noon next week, but she was hoping that we could meet at eleven and just get connected and her meet you live and just connect. So I sent you an invite for that.

 *Mojo Solo* - **03:08**

Oh, yeah, I saw that. So that will be at the same place that.

 *Erik Gabrielson* - **03:14**

Well, no, it might be at a coffee shop real close or something. So I'll update the location.

 *Mojo Solo* - **03:20**

Okay, good.

 *Erik Gabrielson* - **03:24**

Okay.

 *Mojo Solo* - **03:24**

All right. Yeah.

 *Erik Gabrielson* - **03:26**


And then I talked to Martha and what we talked about she came back with those two things, like on the development plan and stuff. I said, well, what we talked about as a team is just identifying this first level of features and it not necessarily being a triggering event itself, but we identify kind of these. These minimum number of features that are going to be done by the. I said, by the end of the year. And she said, just put that together to me and send it to me and I'll adjust as needed.

 *Mojo Solo* - **03:58**

Okay.

 *Erik Gabrielson* - **03:59**

And then on. So I think she went a little bit, didn't understand everything and went down. I didn't. I didn't totally understand this either. But on activates ip, what she had written is that we are actually giving it total ownership to project. We, not licensing it like you are your. And then I told her, but activate still got to operate because we're going to be doing this live stuff, not, it's. We're not going to be in the market as activate. We're going to be. We're going to be supporting project we. And, like, we. This is what I said, like, this is our life work. We're not just going to give up ownership. We might need to want to do a nonprofit in the future. We might want to do who knows what. So she's going to do the same agreement as what?

 *Erik Gabrielson* - **04:53**

As what Mojo Mo's mojo is doing and just doing and making an exclusivity to activate can't go join and go partner with another technology company.

 *Mojo Solo* - **05:07**

Sounds good.

 *Erik Gabrielson* - **05:08**

Is that okay with you?

 *Mojo Solo* - **05:09**

Yeah. Makes complete sense.

 *Erik Gabrielson* - **05:12**

Okay. All right. So then she said then we should be good to go.

 *Mojo Solo* - **05:17**

Okay.

 *Erik Gabrielson* - **05:20**

And I just told her I was talking to you and that just to confirm that you're okay with that approach after our call, and then she'll put it together. So.

 *Mojo Solo* - **05:29**

Yeah, no, that makes sense. I mean, because it's the same thing that mojo mosaic is doing and stuff.

 *Erik Gabrielson* - **05:39**

And then she just reiterated kind of one of our first calls when Dan was on the calls, that when you guys go to sell this, whoever's buying it is going to negotiate all this again.

 *Mojo Solo* - **05:51**

Yeah. I mean, at that time, who gives? Take everything. Give me. Give me my money. I'm out of here. Because, I mean, yeah, if. If I. Yeah, no. February 29, 2028. Eric, that's our.

 *Erik Gabrielson* - **06:12**

That's more than three years, though.

 *Mojo Solo* - **06:14**

Why? I mean, but it's three years and three months.

 *Erik Gabrielson* - **06:21**

Even better.

 *Mojo Solo* - **06:22**

Yeah.

 *Erik Gabrielson* - **06:24**

Okay. All right. So you're feeling good about stuff.

 *Mojo Solo* - **06:30**

Yeah.

 *Erik Gabrielson* - **06:31**

Okay. Did you see my outline? Do you want to review that? Chaz reached out to me. So how do you want me to work with Chaz on this. What? What?

 *Mojo Solo* - **06:38**

Yeah, well, we. We met this morning because he was. Hey, what do you got for stuff? And I said, Eric sending me a timeline or an outline, and I was busy with other stuff yesterday, so then we met this morning. We talked through what you sent him, and then I found your outline in slack this morning. So we kind of looked at that. And I think, I mean, I can kind of convey my thoughts on what. How I think we could kind of mix the two, you know, tell the story. Right. With. With what you kind of already laid out, because I don't think it should be too much, you know, about us and more about what we're trying to, you know, solve and not so much a history lesson kind of thing.

 *Erik Gabrielson* - **07:41**

Well, I think we. Yeah, not.

 *Mojo Solo* - **07:43**

We need to set it up.

 *Erik Gabrielson* - **07:44**

We need to set it up on, like, how we got here and how it's impacting us. And I think the story of, you know, were doing it for us. And, I mean, that's. Yeah, I think. I mean, you need. People need to connect to the why. Right.

 *Mojo Solo* - **08:00**

Yeah, yeah.

 *Erik Gabrielson* - **08:01**

Just what it is.

 *Mojo Solo* - **08:03**

Right.

 *Erik Gabrielson* - **08:06**

And so I would love your input. So, I mean, whatever. Where we're. So was that a good starting point anyway?

 *Mojo Solo* - **08:13**

Oh, yeah. Definitely. Good, bones. Because do you want to just kind of.

 *Erik Gabrielson* - **08:20**

And what I. One thing I do think is super important is that middle piece around the people side of things. Like the winners are going to be having to support their people, to be learning organizations. It's going to be more and more, you know, important. I think that is. I think that's an important piece to this story.

 *Mojo Solo* - **08:45**

Yeah. Enabling humans to focus on becoming their.

 *Erik Gabrielson* - **08:49**

Best selves and learning organizations. I mean, what I took out was they're going to need to learn unlearn and relearn.

 *Mojo Solo* - **09:04**

Yeah. Because it's.

 *Erik Gabrielson* - **09:05**

And I. And the other thing I had in there that I thought might have been too grandiose, but I should have kept it in there because you say this, too, is the way we work, is going to change.

 *Mojo Solo* - **09:16**

I mean. I mean, we're. Are we specifically kind of planting this to be around how we're partnering with Julie? To kind of.

 *Erik Gabrielson* - **09:31**

Yeah. So then it leads into then. Then Julie. Now we're partnering with Julie and that collaboration and what she's doing. Yeah.

 *Mojo Solo* - **09:41**

Because what I was thinking is, like, you know, I was out in California and my nephew Kilty, who was my first employee, you know, went to Stanford, 4.0, whatever, and I can't remember if I told you this or not, but he said, oh, one thing that he stuck out or stuck out for him. I don't know if he's talking to VC's about something else or this or that, but the idea is that the most successful startups are built by a founder who built it for themselves. You know, I'm saying, instead of trying to kind of build something for someone else kind of thing, he says that VC's like that idea, that because we're so close to it, so that we're building it for ourselves and we know that's a need for it.

 *Mojo Solo* - **10:41**

And so I think if we kind of put ourselves in the shoes of the people who are listening, you know, I mean, I. We're business owners just like they are. Right. And we face, you know, all of the same stuff that they do. And so what I was thinking is, like, it's almost like this thing that we're gonna build for Julie and we can kind of say we already started or what, talk about that. But it's like we recognize the need to make this transition even easier.

 *Erik Gabrielson* - **11:19**

Yep.

 *Mojo Solo* - **11:20**

For us. Because, you know, if you think about it, if. I mean, just think about trying to get the papers done, you know, with Martha, it's kind of a pain in the butt because you got to do your day job and stuff and now think of trying to sell well, that's what this.

 *Erik Gabrielson* - **11:38**

I mean, this guy today was like, shit. I am so focused on executing on my business, I do not have time to figure out the best AI strategy. So to have a team like this come in and show me and then add value instantly like that, he's like, holy shit.

 *Mojo Solo* - **11:57**

Right? Because you can go zero to 80 in less than 24 hours. And I think kind of highlighting that how we're business owners, you know, and that, you know, kind of empathizing with them in the same sense that change is hard, transitions are hard, and it typically, you know, is a burden, even though it's something that, you know, you have to do.

 *Erik Gabrielson* - **12:28**

Yep.

 *Mojo Solo* - **12:28**

And that's in talking to Chaz. What was I saying? It was that this, our platform is going to make it, you know, make Julie's stuff even that much easier.

 *Erik Gabrielson* - **12:48**

Yeah.

 *Mojo Solo* - **12:49**

About what we have with, you know, brains, you know, now, you know, load up all your crap.

 *Erik Gabrielson* - **12:55**

Yeah.

 *Mojo Solo* - **12:55**

And. And then have these human meetings, you know, with, you know. Yep. Coach. And then, you know, if we're asking those right questions and they are, you know, it's going to be iterative and I think it's going to make things go a lot quicker and be less painful, right?

 *Erik Gabrielson* - **13:22**

Yep, yep. And just like, go ahead.

 *Mojo Solo* - **13:26**

I was just going to say then the last thing is how, you know, the whole thing, that Maggie's brain right now, you think about a business owner selling their business to a new business owner, it's going to be very attractive if you have that previous business owner's brain.

 *Erik Gabrielson* - **13:45**

Yeah, for sure. I mean that I've been really clear. I've been, I've been a couple comments, like one of the highest values for these, I mean, and I've talked to business like the risk of somebody coming in and nothing having that knowledge. Right. And the other thing is it's going to allow the business owner to not have to be around as long either. So there you go. Right? Yeah, yeah. I mean, so it's a huge value on both the sell side and the buy side of this equation. It's huge. And just like this business owner was saying today, dan, he's like, I've been playing around with chat GPT. I haven't had time to look into the AI and how it's going to support my business. And my intuition tells me because of that, I'm already behind.

 *Erik Gabrielson* - **14:41**

And I guarantee you that's what a lot of business owners are thinking.

 *Mojo Solo* - **14:45**

Yeah. Wow.

 *Erik Gabrielson* - **14:49**

We have to connect to that piece too, right?

 *Mojo Solo* - **14:54**

Yeah. So what else kind of, or do you want to talk through your stuff first or do you want to hear.



Erik Gabrielson - **15:02**

What kind of, well, do you want to go, do you want to think about it? And then on Monday we just, we hammer it out? Or do you want me to talk through it and then that helps you?



Mojo Solo - **15:14**

Yeah, why don't you talk through it and then, I mean, I can just tell you quick, I have like five kind of points is, you know, because again, I don't want to, I think we should set everything up, but then I think we should start speaking into, you know, and using us as a case that, you know, that simplifying the transition process. Right. That's the whole idea around this. And then like speaking into that kind of the human, you know, human benefit. How, how is this, how is the platform going to, you know, do personalized coaching, you know, with all of the, you know, leadership, leader in a box pocket, all that stuff.



Mojo Solo - **16:07**

And then the other thing that I think we should start using more when we kind of talk about AI is that the idea of creating this personalized future self, you know, so that it's a version of yourself, so it kind of takes away like, you're talking to AI, but you're talking to a, you know what, a better version of yourself that has achieved those goals and stuff. And it's actually yourself who is coaching you through this transition process. I know we've talked about that before, but how do you kind of feel about kind of crafting it or kind of message that?

 *Erik Gabrielson* - **16:55**

I think we should say that's not the way it is. It's, it's, you know, like one way to approach it is you can rate your future self and that becomes your coach. And there's some really good psychology around creating that relationship for becoming more. Yeah. For it likely to happen higher. So I think just because I think some people will be like, fuck, I don't want to do that. But it's in the, it's amazing idea, right? I mean, a lot of people are going to be like, holy shit. Yes.

 *Mojo Solo* - **17:36**

Right. I mean, and it doesn't have to be, you know, it's just, it is, it's, I mean, because we talk about the why, you know, why. Why are you selling? Oh, I want to spend more time, you know, and all of that stuff where people focus on numbers and this and this, and they're not focusing on the human aspect.

 *Erik Gabrielson* - **17:55**

So I think where this could be really powerful. David, what you're speaking into is. Yeah, now I get what you're saying is if we could paint the picture of, imagine a business owner painting their ideal future self after they've sold the business, what that life is going to be like, blah, blah, blah. And then we tied in with the $x + y = z$ and, yeah, I think that would be amazing. And then, yeah, you've already reached it. You know how to get there. And so all the set of tools that we're bringing to the table, collaborating with Julie and so forth, allows that you've got your personal coach. Is that what am I connecting?

 *Mojo Solo* - **18:39**

Yeah, no, that's totally it. Because if you think about what we're, quote unquote building for Julie, that's the number one thing, is to sell a business and prepare and get it all packaged up and then, boom, what happens the day after?

 *Erik Gabrielson* - **18:56**

And that's what gets so forgotten.

 *Mojo Solo* - **18:58**

And that's where project we.

 *Erik Gabrielson* - **19:00**

Yep.

 *Mojo Solo* - **19:01**

That's, you know, that's the whole human side of this.

 *Erik Gabrielson* - **19:04**

Yep.

 *Mojo Solo* - **19:04**

And so we're kind of supporting the business owner from a business standpoint and then from a human.

 *Erik Gabrielson* - **19:12**

Yep.

 *Mojo Solo* - **19:15**

And I mean, I think primarily, I mean, these are all small to mid sized businesses. They're not huge corporations stuff. Listening and then talking. Speaking into like all.

 *Erik Gabrielson* - **19:28**

And advisors.

 *Mojo Solo* - **19:29**

Oh, yes. Oh, yeah. Yeah. Because then they're out selling this because then you know, speak into like the family generational stuff, right. And how, boom, you have a windfall of a hundred million dollars and now how are you going to handle that with your kids, you know, and stuff like that? And you don't want everyone just to wait for you to die. Right. And so how is that.

 *Erik Gabrielson* - **19:55**

Yep.

 *Mojo Solo* - **19:56**

You know, how is this? How does it support you beyond.

 *Erik Gabrielson* - **20:01**

Yep. I love, I like how you are connecting that it that way and to speak into it. And so I agree. I now, yeah, so less set up and more. More meat.

 *Mojo Solo* - **20:15**

Yeah, more. More meat in the bones. And so, and Chaz kind of said this to me. I'm like, oh. He's like, so what kind of real examples are you going to say? Oh, I, you know, told him about Maggie's brain kind of thing. I mean, and obviously you knew about it, but it's like everyone, I kind of tell that story to everyone is just like, what? You know, and then if you think about now building the, this, you know, brain, this former, you know, owner's brain for the next owner, that's going to be very going to help that whole transaction. Transaction, transition and make it more interesting, you know, to buy.

 *Erik Gabrielson* - **20:57**

And it's really funny because. Right. I was building out a prototype for the Paulson family I told you about, that we've been working with. And I did this ahead of you, doing, Your sisters. I, You. It's like,

 *Mojo Solo* - **21:20**

And did you show them?

 *Erik Gabrielson* - **21:21**

Yeah, I just did yesterday.

 *Mojo Solo* - **21:23**

And what did they say?

 *Erik Gabrielson* - **21:24**

They're super excited. And so the other thing I did, so, What? So their prototype that I built, this is so great to go in. So I took all our family enterprise stuff and built a family enterprise coach. But then Cambridge, that's their company. So this has not only all, it's got two. It's got. I extracted his brain three years ago and we it out a different way. Right. And now I did, I took it and I put it into this along with the. With their vision and all this sort of stuff. And so it's great. And then the other, the third. Oh, it's not safe. See, sometimes it saves shit and sometimes it doesn't have. Are you anything?

 *Mojo Solo* - **22:30**

Are you logged in?

 *Erik Gabrielson* - **22:32**

No. So that's the other thing. Moira has been building these sites and we haven't been able it's an auto login, but it doesn't always work. So we got to figure that out.

 *Mojo Solo* - **22:45**

Yeah, I think it might be something with somebody because you're trying to log in as a user, then you're trying to log in as an admin, and it's there. If you had a conversation, like I said, it's saved somewhere, but it's just saved under a specific login.

 *Erik Gabrielson* - **23:07**

Okay.

 *Mojo Solo* - **23:08**

Because, yeah, we'll have to figure that out.

 *Erik Gabrielson* - **23:13**

But so then the other thing I did for them is they have an advisory board. And so I took the notes and then the last few fireflies of the advisory board and three years of advisory board meetings and made a brain out of it. And now they can interact with everything that's been talked about with their advisory board over the last three years.

 *Mojo Solo* - **23:39**

And where they just like, well, one guy was.

 *Erik Gabrielson* - **23:43**

One guy who is 68 years old, he's always a curmudgeon, and he's like, I just don't think people are going to use this stuff. How are. How are they going to use this stuff? And then. But his new guy that brought in, he's like, holy shit, this is. And so I got to make it right. We got to make it more user friendly and like that. So what's clear to me now is we have to go back to. We have. Similar to what we're doing with Kelly. Shit is.

 *Mojo Solo* - **24:22**

So while you're looking for that, where I kind of got onto that brain extraction, it's like, we should first talk about that knowledge transfer.

 *Erik Gabrielson* - **24:34**

Oh, yeah, sorry. I'm getting off track here.

 *Mojo Solo* - **24:37**

Yeah, no, but talking about that knowledge transfer and then say, and I mean, and this came out of our own need. You know what I mean? So kind of tie it to this stuff that, you know, and tell, you know, a three sentence story. Our admin, you know, left after 20 years or retired, and then we needed to. Yeah, yeah.

 *Erik Gabrielson* - **25:01**

And I can speak into the family enterprise.

 *Mojo Solo* - **25:04**

Yes.

 *Erik Gabrielson* - **25:04**

Transferring. Transferring knowledge from one generation to the next for the business and that kind of stuff.

 *Mojo Solo* - **25:11**

Yeah.

 *Erik Gabrielson* - **25:12**

That will be a full example.

 *Mojo Solo* - **25:14**

Yeah. And so you can kind of make it, you know, make it about them, but say, hey, you know, we're actually a lot of these tools. A lot of this stuff is coming out of our own need of doing all this kind of stuff. So that.

 *Erik Gabrielson* - **25:31**

So let's finish that. Yeah. And then I'll get you the demo.

 *Mojo Solo* - **25:34**

So, so then just the other one is the talking about reducing human pain around, you know, anxiety around change. Right. That change is daunting. It's stressful, and how can we, you know, minimize that? And I guess you can kind of speak that into that, but. But stress that while technology is a, it's a tool, you know, what we have here, the ultimate aim is to enhance, you know, the human well being and the organizational, you know, the health of the organization that's being sold.

 *Erik Gabrielson* - **26:17**

That's the human part being brought in. Right.

 *Mojo Solo* - **26:20**

Yeah.

 *Erik Gabrielson* - **26:20**

I think part of what we can talk about is what gets in the way, and that's that fear piece. Right, right.

 *Mojo Solo* - **26:26**

And then just the other thing is just trying to achieve, you know, a better, you know, work life balance or however you can say it, but talking on about how, you know, we don't want to. We don't want to give. You're already working your day job, and now, you know, if you think about it, preparing to sell, that's like a whole nother job, and that's going to be, you know, stressful during the times of transition. So, yeah, that's kind of the main. Three buckets or three or four buckets that, I can add into there.

 *Erik Gabrielson* - **27:06**

Okay. All right, well, I'll work on it, too, over the weekend, and then we'll get it dialed in, and we can. We can, kind of finalize on Monday.

 *Mojo Solo* - **27:19**

Yeah, because I want to go in there with, here's 20 paragraphs that I'm going to say, and I want to, in a sense, have it in front of me, because otherwise.

 *Erik Gabrielson* - **27:31**

Yeah, well, each of us, we won't have 20 paragraphs.

 *Mojo Solo* - **27:35**

No, I know, but I'm saying, like, yeah, if, like, if we touch on this, then I can add into that or.

 *Erik Gabrielson* - **27:41**

Yep.

 *Mojo Solo* - **27:42**

Yep.

 *Erik Gabrielson* - **27:43**

Yeah. Okay, cool. All right.

 *Mojo Solo* - **27:50**

Do you want to maybe just run through your outline quick and just kind of speak into what you were? Kind of the bones of that, and then I can take our conversation and my notes and your notes and put something together that then we can review on Monday.

 *Erik Gabrielson* - **28:12**

Yeah. So I just thought, you know, at least a little bit. They need a little bit of, you know.

 *Mojo Solo* - **28:17**

Oh, yeah. I mean, 40 years of that and.

 *Erik Gabrielson* - **28:22**

30 years of mojo. Right. I mean, 20.

 *Mojo Solo* - **28:26**

But. But, you know, I've been in corporate life and everything for 30 years, you know. Yeah.

 *Erik Gabrielson* - **28:34**

So, yeah. 30 years of communication and design.

 *Mojo Solo* - **28:37**

Yeah.

 *Erik Gabrielson* - **28:38**

Right. Okay. So I don't know how much of this we actually want, need to put in our journey to create, but I think we need to go, like, hey, we couldn't find anything out of there that supports people the way we want to support people. So we came together with our history of collaborating. And then AI came out and we like, hey, this is going to change the game for us and everyone around us. And we're committed to being on the front end and figuring this out. And collectively we felt like we had some unique things to offer from a design and human perspective to really support the AI, supporting the human rather than supplanting them.

 *Erik Gabrielson* - **29:29**

And then so what came out of it is uniting the decades of human performance with innovative design and gen AI solutions, enabling humans to focus on becoming their best high performing individually and collectively. So, yeah, and I don't. And so I was thinking, you know, it's around integrating people in process, making better decisions, executing at a higher level, more effective and productive. And one of the biggest is becoming a breakthrough learning, continuous learning organization.

 *Mojo Solo* - **30:12**

Because how does breakthrough learning change the game, would you say?

 *Erik Gabrielson* - **30:18**

Well, because it allows you to take different actions than you never even saw before. So that's can talk through breakthrough learning, but it's getting out of your existing paradigms and starting to see how they are limiting potential possibilities and what, and so a big piece of that is the whole clarity. So we don't want to, I don't know that we need to get into all that. But if you're about the impact you want to have in this future, then you can assess not just what actions you're taking, but what are the paradigms you're living in that might be serving you, getting there and getting, and what might be getting out of the way. And so, and with AI, it's pretty hard to understand how much opportunity there is. And so by starting to step into it can.

 *Erik Gabrielson* - **31:18**

And what we built helps you build this breakthrough learning muscle.

 *Mojo Solo* - **31:24**

And I mean, yeah, that, well, if you go back up just a bit because I think, you know, kind of having little, you know, it's one thing to say, oh, integrate people profitable, but when you kind of speak into a specific kind of, you know, something that's like more a methodology or changing your thinking, you know, to get you to kind of realize that, you know, that maybe you are in, you know, you're in this, you know, same way, both thinking.



Erik Gabrielson - **32:04**

I mean, the big, one of the big pieces too is that's not in here. I just had to kind of start to make some choices. But like, so on the integrating people in process, what tends to happen, organizations right now is they're focused on execution and process and they know the people part is important, but it happens over here. And when you start to integrate them, it allows you to accelerate both execution, but also what's possible. Because if you're just focused on the process, it puts a governor on what's possible because the process is only as good as the people that are operating that process. So if you can also unleash what's already inside the people now you have unlimited potential. And then to bring them together and integrate them into your application and your practices every day. Now, you are doing that consistently.



Mojo Solo - **33:10**

Because people are bought in. I mean, they feel like they're the part of this versus on the outside.



Erik Gabrielson - **33:20**

Because you allow to connect the through line. So that's the other. Be the through line of what's important to me. It's important to organization, it's important to our clients. Where's the through line? And that's, that is not achieved too often in organizations because it's so focused from here's where we're going to telling people what to execute rather than turning it around and creating the opportunity for people to get aligned so they have ambition towards and take accountability towards that outcome.

 *Mojo Solo* - **33:57**

And that's how you get create these synergies. Cause if people are motivated and feeling supported, they're naturally just gonna try harder, you know, and not just kind of, you know, encounter obstacle and.

 *Erik Gabrielson* - **34:16**

Yeah, they're. So what you're speaking into is they're gonna be willing to get outside their comfort zone to get after this rather than let that comfort zone determine what they're willing to do.

 *Mojo Solo* - **34:27**

Okay. I think it's okay if we. If we're very, you know, if we just say it in a sentence or two, you know, and that's why I kind of want to get to this point where, you know, we're speaking specific and not so general.

 *Erik Gabrielson* - **34:45**

So I like this conversation much better than what I put down there.

 *Mojo Solo* - **34:49**

No, yeah, this is, I mean, this is good that. I mean, this is how we work. You iterate on each other.

 *Erik Gabrielson* - **34:54**

Yeah, but if you can capture this, because this is a really important piece.

 *Mojo Solo* - **34:59**

Yes, because that. Because that, if you think about it, I mean, if we're selling project lead and we had 50 people working for us, you know, we want to make sure that, you know, I mean, I feel like I want to make sure my employees are taken care of first. Right. The people. Because they helped me build this and this.

 *Erik Gabrielson* - **35:23**

Yep, absolutely.

 *Mojo Solo* - **35:23**

And if you kind of think about it from that perspective, what you're kind of speaking into is that, you know, by having this natural tendency to I'm selling the business, I have to get all my numbers together and you forget about all the stuff over here. You know, you need to integrate that so that the future buyer will be just as successful. Right. And so I think kind of speaking into that, you know, right there, do we support humans being.

 *Erik Gabrielson* - **36:02**

Yeah, I like this conversation much better than what I put down.

 *Mojo Solo* - **36:06**

Okay. And you like the way you say, you know, to become or to strive to be a better version of ourselves.

 *Erik Gabrielson* - **36:16**

I think we can say better than that. It's, we strive to unleash what's already inside of us and be our highest performers and bring our best value forward. That's what I like to say.

 *Mojo Solo* - **36:30**

Okay.

 *Erik Gabrielson* - **36:31**

And then I really like what you just talked about, though, because I think it's a really important piece, David, that so many of these business owners are focused on the value and that number. And it, this being a transaction where if you, by unleashing and what we're talking about, it actually drives higher value and for the business and the buyer. And so it's a big mess for a lot of organizations. They think it's about them when it's really about the collective.

 *Mojo Solo* - **37:08**

Yeah. So what do you mean about, like, learning organization here?

 *Erik Gabrielson* - **37:14**

What I mean is that, back to that breakthrough stuff is that they're willing, they have their people, and they as leaders, they have created a dynamic where people are able to try things and learn, and they're not reprimanded for making a mistake when they're trying to be innovative, that they're actually celebrated. And it's not about what you did wrong. It's about what did we learn? What could we do better? How are we going to change next time? And the faster you can do that with where the world is going today, the further you're going to be ahead. And many times when you're making those times mistakes, you're learning stuff that nobody else is because you're the one that took the action. Now you're ahead of the game.

 *Mojo Solo* - **38:14**

And that's, I mean, that's kind of where we're at with AI in a sense. Right?

 *Erik Gabrielson* - **38:21**

I mean, absolutely. That's exactly where we are with AI. And so it's going to even put more pressure on that ability to do that. And if, Ann, what we're doing is we're designing where we brought that human piece to support that and using AI as a tool to accelerate it.

 *Mojo Solo* - **38:43**

Right. And I like the idea of leading, you know, in terms of project we, with this thing. Yeah, we could go say, hey, we got this great grand builder thing or whatever, all this technology, but from the standpoint of the human, you know, potential, the humanness of all this is that is going to become even more critical as AI progresses because AI is going to be, you know, doing a lot of the work. And now all of a sudden you need to have these better, you know, people skills and better ways to work together and to execute.

 *Erik Gabrielson* - **39:30**

Yep. So to build connection, to build trust, to be critical thinkers and, yeah, to be able to execute at a high level and that execution, you need alignment and attunement. So alignments where we're going together, attunement's how we're taking care of each other within that journey. And what are those standards that it means to be on this team?

 *Mojo Solo* - **39:58**

So, you know, I remember one point, I remember being in the hot tub and talk, like talking to AI about being able to talk to potential buyers. You know what I mean? So, like, if you know, what I'm saying is like, that you only know what you know, right. And how can you? And since you're the business owner, you know, your business inside now, you know, Julie is just kind of at this kind of coaching organ, you know, kind of level of telling, guiding you through this, but you're the one who's filling out all the answers and stuff. And so I think from my perspective, I would want to be able to basically, you know, talk to these Personas that would come in and want to buy my business because Julie can only kind of go so far with her knowledge.

 *Mojo Solo* - **41:02**

And if you're not able to extract it from your own brain, you know, I think a lot of that.

 *Erik Gabrielson* - **41:12**

Man, that would be. I mean, how cool.

 *Mojo Solo* - **41:15**

I know. And I think if you kind of speak into that a little bit, you know, like as now just imagine, you know, and maybe we could talk to Julie on, like, give us a couple examples, you know, and does Julie have. He must have.

 *Erik Gabrielson* - **41:31**

Yeah, for sure.

 *Mojo Solo* - **41:32**

Galore around what, you know what I mean? Because it's almost like you kind of, you know, are self preparing everything but with Ga's guidance, but even to a higher level.

 *Erik Gabrielson* - **41:48**

Yep.

 *Mojo Solo* - **41:49**

So that you can anticipate and predict with foresight what's going to happen. And then when it comes, and I don't know how the whole, you know, transaction thing works, I'm assuming it's kind of like what we've been doing with Martha, talking to her, blah, blah. But like to arm yourself with, you know, that extra kind of level of preparedness, right. So that you can say, oh, yeah, thought of that, thought of that, you know, and here's something else that, you know, and just because what you're trying to do is you're trying to tie this little present up in a nice little bow and. And not just have lipsticks on the tag. You really want it to be buttoned up and have all this.

 *Mojo Solo* - **42:37**

And I just think, obviously, using Julie's stuff, but us transforming that into, in a sense, a new way to do exit planning. Right. And. And to integrate the family generation, you know, all of that stuff. I mean, I think that's. That's like our sell because.

 *Erik Gabrielson* - **43:04**

Yep.

 *Mojo Solo* - **43:05**


If I. If I. If were to sell for 50 million, I'd be like, I need to make sure that my kids don't end up hating each other, fighting anybody like that. I want to co create their future. I want to co create their. Their path. I want to take care of them now.

 *Erik Gabrielson* - **43:26**

Yep.

 *Mojo Solo* - **43:26**

And after I'm gone, and I think.

 *Erik Gabrielson* - **43:29**

That you don't want to put it on them. You. The co create the huge piece.

 *Mojo Solo* - **43:33**

Right, right.

 *Erik Gabrielson* - **43:34**

Yep.

 *Mojo Solo* - **43:35**

And you do it while you're alive so that you can make kind of start to create that legacy. Right?

 *Erik Gabrielson* - **43:41**

Yep. This is the conversation. This is the conversation we need to have.

 *Mojo Solo* - **43:46**

Yeah. Yeah. Because if you think about. That's, you know. Cause I saw a TikTok or something that said the number one way to be rich is generational wealth because you inherit, you know, that kind of stuff. But not everyone has generational wealth. Right. So. Yeah, that. I mean, how don't you think, kind of speaking into that timeline, you know? I mean, for some reason, I think it's three years of getting your business ready to sell. Right.

 *Erik Gabrielson* - **44:24**

Is that some people say five.

 *Mojo Solo* - **44:26**

Five. Yeah, think of three or five.

 *Erik Gabrielson* - **44:29**

Now, with our tool, you could get it ready and. Yeah.

 *Mojo Solo* - **44:35**

Right.

 *Erik Gabrielson* - **44:35**

Well, and also, David, think about to.

 *Mojo Solo* - **44:38**

Be more planned and to be more.

 *Erik Gabrielson* - **44:40**

Thoughtful and think about if you integrate our tool into your business, how much that will increase the value. I mean.

 *Mojo Solo* - **44:50**

Yeah, because that becomes. Yeah, so, I mean, so what you're. So. In a sense, I mean, it kind of goes back to our channels. Exit planning is one little channel. And now you get on the project we platform. It's like, oh, here's the. Here's the exit planning channel. Here's the business process and improvement efficiency channel. Now you add that on. Now you got two. Now we get access to all theme. Yeah. So you use.

 *Erik Gabrielson* - **45:21**

So, see, now you're getting this. Yeah.

 *Mojo Solo* - **45:25**

Right. I mean, so it's almost like you think about exit planning. What's the three thing that. Three things that happened before that, then what's the three things that you happen, you know, after? So I think, kind of going even broader, that it's not just about the transaction and just selling the business. It's about what, like you said, what. What's important to you, who is important to you, and focusing on that, and then all of that will fall into place and. Yeah. And then creating that legacy. I mean, I would. You know, I had \$50 million. I like to have something. Not that I care. Oh, it's the. The man family, you know, institute or something. But, you know, I would like to make a difference right. Within my community, you know?

 *Erik Gabrielson* - **46:18**

Yep.

 *Mojo Solo* - **46:20**

On a local level. Not like the big fancy heart institute thing or something.

 *Erik Gabrielson* - **46:27**

Yep.

 *Mojo Solo* - **46:29**

Okay. Yeah, I think I have enough.

 *Erik Gabrielson* - **46:35**

Yeah, I bet. Yeah. I mean, there's our podcast right there.

 *Mojo Solo* - **46:38**

I know. And have you. I mean, was it you and Moira that sent me that notebook? Have you played at that podcast making?

 *Erik Gabrielson* - **46:49**

No, that moira sent that? Yeah.

 *Mojo Solo* - **46:51**

Oh, she did? Okay. Chaz sent me one on meetings or whatever, and it's insane how real it sounds, you know? It's like, hey, I. Let's talk about meetings. Then the woman goes, yeah. Did you know there's 25 million meetings per day? Like, wow, that's crazy. You know? I mean, and it sounds so freaking real. It's just unbelievable.

 *Erik Gabrielson* - **47:20**

So, okay, the two other things that I want to talk about is the demo and TCF and where you're at with TCF.

 *Mojo Solo* - **47:34**

I will have something ready by Monday for TCF.

 *Erik Gabrielson* - **47:37**

Okay.

 *Mojo Solo* - **47:38**

Guaranteed. And demo for.

 *Erik Gabrielson* - **47:41**

For our demo. So what I'd like to do is, I think we need to get back to. We have all these moving pieces. I think we need. Like you're doing. We're doing with Kelly. I think we need to get back to this and be able to go to one place and be able to have some prototypes, be able to show the. The elan us bank, Polaris. We need to be able to show the flipbook. We need to be able to show all the little features in one place. So I'm not going here, here.

 *Mojo Solo* - **48:14**

Right, right.

 *Erik Gabrielson* - **48:15**

And we just have it all. We can tell the story in one place.

 *Mojo Solo* - **48:19**

Yeah. And it doesn't always have to be, like a chat bot or something. It's like, hey, look at here. Click on here. And then here's what. Here's one thing we did. It's you.

 *Erik Gabrielson* - **48:28**

Yeah, yeah. No, it's like, an example of features. Yeah. Telling stories. Not just. Not just the chat bots. I think it needs to be the collective yeah.

 *Mojo Solo* - **48:42**

And we just need some simple visuals. I mean, kind of like, you know, projectwe.com in a sense. Right?

 *Erik Gabrielson* - **48:49**

Yeah, yeah. Yep. But this. This is the demo, and. And. And it's all there. I know. We can just plug it in and we just need to hide the how, the story and how we do it. So.

 *Mojo Solo* - **49:09**

And then. Yeah. Talking about the. What are the. How do you get your toes in and making it easy for them to.

 *Erik Gabrielson* - **49:21**

Yep.

 *Mojo Solo* - **49:22**

Kind of. Oh, yeah. That makes sense. Let's try it out, because once people get on here, I mean, they're not going to leave, you know?

 *Erik Gabrielson* - **49:31**

Yep.

 *Mojo Solo* - **49:33**

Okay. So did you have other meetings this week, too, or.

 *Erik Gabrielson* - **49:37**

Or just one got moved to the first week, November. The known in one did.

 *Mojo Solo* - **49:43**

Okay.

 *Erik Gabrielson* - **49:43**

Yeah, yeah.

 *Mojo Solo* - **49:46**

That's the one I was thinking of.

 *Erik Gabrielson* - **49:48**

So the known and one got moved. I did have. I had one with Redpath account advisors and their accounting, and they're going through major changes, so they're thinking about. They want to talk to us internally, but also the platform for out. So I had that meeting yesterday. Brooks I talked to. Brooks and his dad and crew are ready to rock and roll, and so he's thinking more so that we needed you and me and Brooks and his dad need to get on a call, and so. And then I'm talking to. Brooks has a couple more people next week that we're talking to. I talked to the Paulson's yesterday and show demo. I talked to a dude, is a Microsoft dynamics reseller. I had happy hour with him yesterday, and he's, like, blown away by what we're doing. And.

 *Erik Gabrielson* - **50:57**

Oh, and then yard creations, I already told you about them.

 *Mojo Solo* - **51:01**

Oh, that landscaper.

 *Erik Gabrielson* - **51:03**

Yeah, the landscaping one. But next week, I've got a bunch. Bunch also, so I've got two private equity groups, an m and a group. I've got Brooks's kids golf coach who wants to bring this to the. And he's connected to the PGA and pro players. He wants to build. Bring this. That I've got, Oh, I've got my pitch club. So 18 business owners so we can add in. That's Thursday morning. I got 20 minutes in front of 18 business owners and all types of business.

 *Mojo Solo* - **51:56**

Yeah. Okay.

 *Erik Gabrielson* - **51:58**

I'll. I'll get you a list over the weekend. I'll get a list.

 *Mojo Solo* - **52:01**

But think about, I mean, what we're talking on Julie's podcast.

 *Erik Gabrielson* - **52:06**

Yep.

 *Mojo Solo* - **52:06**

I mean, it's kind of the same in a sense.

 *Erik Gabrielson* - **52:10**

Yeah.

 *Mojo Solo* - **52:10**

Where hers was maybe focused a little bit more on exit plan, but I.

 *Erik Gabrielson* - **52:13**

Can also use a deck if I want.

 *Mojo Solo* - **52:16**

Right.

 *Erik Gabrielson* - **52:17**

So I'll make a list and then let's really talk about that on Monday. I got more time for us on Monday. I scheduled because I think.

 *Mojo Solo* - **52:29**

Wait, what have you gone into that slides.com at all or mostly Moira, probably.

 *Erik Gabrielson* - **52:35**

I've gone into it. I've gone in and looked. I have not.

 *Mojo Solo* - **52:38**

Yeah.

 *Erik Gabrielson* - **52:38**

Manipulated, but yeah.

 *Mojo Solo* - **52:40**

I mean, because if you kind of start thinking about maybe instead of doing a deck and keynote or something that we should try to start.

 *Erik Gabrielson* - **52:50**

Yeah, I would do that. Yeah, let's do that.

 *Mojo Solo* - **52:53**

Yeah.

 *Erik Gabrielson* - **52:54**

Yeah.

 *Mojo Solo* - **52:54**

Only until we crack the nut of how can we generate this stuff automatically, which hopefully is coming soon. But I think for now, giving that ability to Moyer to go in, make changes for you, going add a slide, slapping the image, you know, hey, David, clean this up. I think that will be helpful to kind of have these multiple threads of, you know, presentations that then you could basically turn on or off for demos, you know, or just have them all there and you just pick which one you want to show and, you know, kind of something like that. Okay.

 *Erik Gabrielson* - **53:39**

That would be great. So Moira's thinking is actually doing to put also working on kind of creating a presentation on that. Exactly. So we'll take what you do with our podcast and what she's done, and then we can combine that on Monday and say, here's what this pitch is going to be.

 *Mojo Solo* - **53:58**

Okay, good.

 *Erik Gabrielson* - **53:59**

Sound good? And then the other big meeting is with this altafid company that Brooks knows well. This is a comprehensive toolkit designed to strengthen advisory firms. And they're focused in South America. I told you. So. Their platform is, it's a client portal where. So this is client facing, document management, reports and analytics, billing, trading, rebalancing. So it's all the transactional stuff. And they want to be in conversation with us on the front end, us doing like. And then as soon, you know, like having the exit planner, having all the stuff that we've talked about we could add on others and the fact that we can put it in all these languages. So these guys are really excited to talk to us. They've got a CRM, onboarding and workflows, portfolio construction, compliance.

 *Erik Gabrielson* - **55:06**

So we could probably go in and do our front end, but you could come in and also integrate and just make this thing go bonkers. Because, I mean, because they're not using AI.

 *Mojo Solo* - **55:22**

They're not.

 *Erik Gabrielson* - **55:23**

No.

 *Mojo Solo* - **55:26**

I mean, they must have money.

 *Erik Gabrielson* - **55:28**

Yeah.

 *Mojo Solo* - **55:29**

Banks.

 *Erik Gabrielson* - **55:30**

So, iras. Oh, there's, this would be, yeah.

 *Mojo Solo* - **55:44**

Wow. I mean.

 *Erik Gabrielson* - **55:47**

This would be, if he could. If he could connect the dots, then we would have. We would have. Collectively, between this and us, we would have a hundred percent virtual family office.

 *Mojo Solo* - **56:09**

This is. This is all.

 *Erik Gabrielson* - **56:12**

Plug and play solution to every RIAa out there.

 *Mojo Solo* - **56:19**

Right? Because you're saying we would use their kind of their dashboard technology and put our stuff on there to make it a holistic kind of.

 *Erik Gabrielson* - **56:31**

So they could do all the transactional stuff and all the. That kind of stuff and then have all our stuff to family. Yeah. On top of it. And they're expanding fast in South Africa right now.

 *Mojo Solo* - **56:48**

Wow.

 *Erik Gabrielson* - **56:50**

So it would open up a whole nother market continent. And I've got, you know, I've got a guy that has been dying to be with us. I think I've mentioned to him a year ago Oscar, who is from Bogota, Colombia, and he's also in that market, and he is a family advisor, and he could run the whole South America opportunity.

 *Mojo Solo* - **57:22**

Wow.

 *Erik Gabrielson* - **57:24**

Now, the difference with South America is they don't pay as much as North America, but that. That is why a virtual solution is so good.

 *Mojo Solo* - **57:35**

Yeah. We build it once, and then.

 *Erik Gabrielson* - **57:38**

Yeah.

 *Mojo Solo* - **57:39**

Sell it over and over.

 *Erik Gabrielson* - **57:41**

So that's what I got next week. So the. I really want to get the pitch dialed in for these 18 businesses.

 *Mojo Solo* - **57:47**

Yes. And don't you think kind of what we're coming with, virtually. We could kind of make a similar.

 *Erik Gabrielson* - **57:56**

Yep.

 *Mojo Solo* - **57:57**

Okay. All right. I think I'm good.

 *Erik Gabrielson* - **58:05**

Okay. I'll send out an email to Martha after this. Just confirming. And. And you're coming. You're. You're packing up this weekend, and you're around next week?

 *Mojo Solo* - **58:18**

Yeah, we're coming home Tuesday, closing up.

 *Erik Gabrielson* - **58:22**

The cab, and I. I'm in town all the way through the next weekend, so.

 *Mojo Solo* - **58:25**

Oh, you are? Okay. So I'll see you Wednesday, and we can figure out something.

 *Erik Gabrielson* - **58:30**

Okay. Right. Thanks, man. All right, say hi to Christy. And do you guys have anyone coming up this weekend to help or just kind of doing your thing?

 *Mojo Solo* - **58:43**

No. Anna and her girlfriend are here, and Sam and his girlfriend are here. And we're gonna do something here as soon as I get off this call, because this is my last call of the day.

 *Erik Gabrielson* - **58:54**

All right, sounds good. Well, enjoy the afternoon and the weekend, and thanks, and we'll talk to you Monday.

 *Mojo Solo* - **59:03**

Okay. So I'm gonna focus on TCF, get something going on there, our next steps kind of thing, so everyone's feeling happy, and then align our conversation here, pull something together that we can review for the podcast, and then just. I think that's enough for the weekend.

 *Erik Gabrielson* - **59:22**

Yes, that's more than enough. Yes, that's great. Okay, thanks.

 *Mojo Solo* - **59:25**

All right. Sounds good. Thanks, everybody.