**Forecasting\_ Pilot & Rollout Planning \_1-20250313\_110140-Meeting Recording**

March 13, 2025, 4:01PM

35m 36s

 **Jonathan Aulson** started transcription

 **Sowells, Amy** 0:03  
Yeah, I think we've got everyone.  
Yeah, Chris.  
We're missing but.  
Can probably get started.

 **Jonathan Aulson** 0:16  
Very good.  
So I put in the agenda some questions that we might that might kind of spur some thought here.  
And just wanted to kind of run through those.  
There's of course there's two kind of categories for us to think about pilot as we as we finish up the development.  
Period of the project.  
Who do we want to pilot for and and how do we want to manage that?  
And then the actual roll out once the pilot's complete, and we've gotten that feedback.  
What kind of strategy we wanna take there?  
So I I I don't know.  
We can.  
We can walk through each of these questions if we think that's helpful and kind of have conversations.  
I don't know if maybe there's already some thoughts on the town park side about how we wanna handle this.  
So just thought I'd open it up for that.

 **Smith, Jeremy** 1:07  
Yeah, I guess this is my part of the show, right?  
Yeah. So we've been thinking about it.  
These questions were a great good starter for, you know, T and I to kind of.  
And then I'm talking to Amy about it for a while now, too, about, you know what our thoughts are.  
I mean we can start with pilot. I have some thoughts on kind of rollout and timelines we can get to. You know, I think we do wanna talk timeline 1st and who The Who towards the end. I think it might be the best way to go about it.  
Right.

 **Jonathan Aulson** 1:39  
Sure.

 **Smith, Jeremy** 1:39  
Right.  
So kind of the way I was thinking about it.  
Was thinking working your way backwards right?  
And when we wanted to be live and and Amy, I don't know if there's any update on like, do we have a drop dead date for when we want to be fully live by?

 **Sowells, Amy** 1:56  
October is the plan.

 **Smith, Jeremy** 1:58  
Perfect that lines up really well.  
With what I put together so.

 **Sowells, Amy** 2:02  
Oh good.

 **Smith, Jeremy** 2:04  
So and we worked backwards from a rollout perspective, right, and think of a timeline.  
You always try to find times when when you're looking about workshops and things like that. Getting people that when people are already together and we have qbrs, which is our business reviews.  
In mid-september, which would be a good chance for kind of the V PS DM to get a workshop.  
And then I'll share my screen if you want.

 **Jonathan Aulson** 2:31  
Good thing.

 **Smith, Jeremy** 2:32  
Yeah, kind of. I just.  
We just threw some notes down of what I was thinking and I'm I'm extreme of consciousness right now, but we'll we'll get our our way back in.  
So let's let's start back from from the start, right?  
So I think the idea when we were together was.  
This team would train our kind of function owners power users on the product, right?  
And then our team would use that the RF DS RFMS Tia talent, the the, the Learning team.  
But from then would build the training.  
Build the work day training from kind of that experience of understanding the system, then how we're gonna apply it to what town park's gonna do from our process perspective, right?  
So we build out that training. That would be one.  
Focused on the transition of what's gonna be different, but also steady state for all future managers that there are gonna be enrolled in this new process of how we do the training right.  
So we're building it not just for the event of changing systems, but also for future all future leaders joining the company.  
And this is how we forecast now.  
After that training is built we we obviously would then kick off our pilot. You know we can talk to the rfds on.  
I trust their opinions more than anybody else on who the.  
District B, just from our experience on doing rollouts previously, the couple districts I picked were Long Island, Dallas, Orange County of leaders that are very engaged, ensuring that things get done and and get provide good feedback. You know that that's one healthcare heavy and then two hospitality heavy.  
Districts. That's kind of why.  
Another reason to pick those so the way I looked at a pilot would be similar to the the full roll out is there'd be a kickoff virtual kickoff explaining what this is.  
What the expectations are, what the timeline is.  
They'll be assigned the online training to get a base knowledge of what is expected and what is happening.  
Then there'd be an in person workshop where they would work together with the function owners to build out their their first schedules.  
Kind of like a working session to learn the system better.  
And then, you know touchpoints on those weekly adjustments to the forecast feedback sessions and then adjustments to the system from what we find that work didn't work, didn't work, things like that.  
That's kind of how I saw a pilot.  
Jonathan, is that kind of around what you were thinking?

 **Jonathan Aulson** 4:45  
Yeah, absolutely.  
I mean, this makes a lot of sense, right?  
Kind of a a super user group training to get you know the the knowledge spread and then developing some content for the pilot.

 **Smith, Jeremy** 4:57  
Mm hmm.

 **Jonathan Aulson** 4:58  
The one I think.  
One thing for me to understand a little more is around like the timelines involved in developing the work day training.  
I know we don't.  
We don't have anything to look at yet to kind of extrapolate that, but I'm not sure if there's any experience you have that that might lead you to believe a certain length of time.  
Times would be involved in that.

 **Smith, Jeremy** 5:18  
Yeah, it's it's pretty quick.  
We do that in a we can do that in a couple of weeks.

 **Jonathan Aulson** 5:20  
OK.  
Oh great.  
OK.  
Good deal.

 **Smith, Jeremy** 5:24  
Maybe even less, right, depending on what we find.

 **Esposito, Ryan** 5:25  
All right.

 **Smith, Jeremy** 5:26  
And Tia will be the will kind of be the expert leading this on. Is it just a recorded video of us navigating?  
We've also built ones where there's like the the manager taking the training can like click on different things and then they can see what that actually does.  
We'll have to get a little more familiarity with the system to understand what the scope of the training would be.

 **Jonathan Aulson** 5:45  
Makes sense?  
And then the the in Person Workshop is the vision there kind of there be a single central location that everyone comes to for an in person or I know we have like a few different districts identified here?  
Would it be 3 different in persons? Or how do you see that happening? I'm sorry.

 **Smith, Jeremy** 6:01  
Yes, three different in person.  
Yeah, so each dish.  
Yeah, 3.  
Each district would do their own in person. They did come together in their in their, in their, you know, geography and then do it together.

 **Jonathan Aulson** 6:08  
Gotcha. OK.  
Makes sense?  
OK. And then the weekly adjustments item you you show there is, could you could you tell me more about that?  
I'm not sure I caught that one.

 **Smith, Jeremy** 6:23  
I think that would be like weekly adjustments to the forecast.  
So, like, what's the rhythms going forward? So as they're going in and making adjustments, how?  
And I would take feedback from the RF DS more on and Amy on this on how how they're making adjustments and kind of doing that together and less on their own or having sess where they come back and you know, say I've made my adjustments just tracking the.  
Process through the first month basically.

 **Jonathan Aulson** 6:47  
That makes sense.  
And that's that's one of the key pieces for me to kind of understand as well is. So you mentioned the first month, I think one question I have is what what's the length of time that makes sense for a pilot to to be valuable for forecasting, yeah.

 **Smith, Jeremy** 7:04  
Yeah.  
I would think and again you guys I'll ask for RFD and Amy and everybody's support on this.  
My thought would be 45 days, right?  
You do your first forecast mid month of, let's just say May.  
You're doing June's forecast.  
I'm just throwing dates out there, right?  
And then you have all through June to make your adjustments.  
Do what we would normally do through our process of forecasting and see how it kind of ties that month end that seems about right.  
Chad, you know Ryan. Amy, any thoughts on that?

 **Sowells, Amy** 7:35  
I think that makes sense.  
I'm just thinking and I don't if this is the right strategy but.  
For Jonathan, for a pilot, like if if those AMS get through the 1st 15 days or even the 45 days and and they're like wow, you know what would be really nice is to have X like is it is that appropriate feedback to get during a PIL?  
So that you still have time to make changes to the system before we actually roll it out officially.

 **Jonathan Aulson** 8:06  
I mean absolutely.  
That's that's something that, you know, we could run into, right?  
An enhancement request that makes a lot of sense to everyone.  
We all wanna pursue it.  
It does also obviously have implications for the timeline, right?

 **Smith, Jeremy** 8:21  
Yeah.

 **Jonathan Aulson** 8:21  
So I think it's it's gonna have to be a case by case basis a little bit unless we wanna plan for some of that in advance.

 **Smith, Jeremy** 8:25  
Yeah.

 **Jonathan Aulson** 8:28  
That's, I mean that's that's.  
A.  
That is a yeah.

 **Sowells, Amy** 8:32  
But maybe those maybe those items become the phase two, the phase two items, you know, yeah.

 **Smith, Jeremy** 8:32  
No, I think it's I think it.  
Yeah, yeah. Any I think that's that's part of it, right is we want to have the minimal viable product to get out there, right.  
But what is something that's look 'cause. You're gonna get a lot of feedback from managers on stuff that makes sense or just makes sense for that one site in the middle of Topeka, KS. Right. Right. So, like for me, I need this for everybody. Right. So I think.

 **Jonathan Aulson** 8:52  
Yeah.

 **Smith, Jeremy** 8:56  
There'll be part of part of this process and I'm Jonathan built in is.  
Kind of going through those requests and and feedback for what's really.  
Important that hey, we've totally missed this and we have to get it in there now.  
We had a couple of those with Legion where through the pilot, the second pilot, we're like, holy crap, I can't believe this was missed, right?  
We got to fix this before we go live to everybody. And then there was somewhere. This will be a cool enhancement after everybody has the basis and they're starting to use it.

 **Jonathan Aulson** 9:16  
Hmm.

 **Sowells, Amy** 9:23  
Yep, Yep, Yep. OK.

 **Jonathan Aulson** 9:23  
Yeah.  
So this makes a lot of sense.  
I do want to show I'm gonna steal the screen. Jeremy, just for a minute.

 **Smith, Jeremy** 9:32  
Yep.

 **Jonathan Aulson** 9:34  
I want to show kind of our.

 **Esposito, Ryan** 9:34  
Hey, Jeremy, just, just just real quick.  
Are you kind of leaning towards Louis?  
Did Legion with like the in person we would go to that market and we would do kind of the same kind of thing that we would do in Legion.

 **Smith, Jeremy** 9:47  
Kind of a little, a little different.  
I think it'll be a little different because I think we'll get to that, but I think this will have to be a Big Bang and not a phase once we get to the full company roll out.

 **Esposito, Ryan** 9:57  
OK.

 **Jonathan Aulson** 10:02  
Just kind of think.

 **Smith, Jeremy** 10:03  
A little bit. Go ahead, Jonathan.

 **Jonathan Aulson** 10:03  
Oh, no, you're good.

 **Smith, Jeremy** 10:04  
I'm sorry.

 **Jonathan Aulson** 10:07  
Just wanted to kinda show the timeline that we that we've been working with so far for planning. Whoops, let me get to the right timeline here.  
Here we go.  
So in our we we have what I would call an aggressive plan right now for pilot and roll out. And you know this was I think the understanding was that we would have this group together and start really getting the details and that that might impact this, this.

 **Smith, Jeremy** 10:28  
Yeah.

 **Jonathan Aulson** 10:38  
Timeline, but just to kind of make everyone aware.  
So our development window is this guy that ends approximately beginning of September.  
At that point, we go into kind of a final testing.  
This is a couple weeks where we're doing the final round.  
Of testing on the completed kind of MVP product.  
So pilot, right now we're showing on the on the schedule for four weeks.  
September 10th through October 7th and then a two week rollout after that.  
So this is, you know, we have six weeks essentially for pilot and roll out in the plan right now. And I just wanted to call that out that you know, obviously if we're talking about a 45 day pilot that's going to push this out a little bit.

 **Smith, Jeremy** 11:23  
Yeah.

 **Jonathan Aulson** 11:24  
And then.  
It sounds like you guys were leaning towards a Big Bang rollout. So two weeks for that might might be an appropriate amount of time, but it's the pilot is the one that sounded like it.  
There might be a a little bit of a difference here.

 **Smith, Jeremy** 11:37  
Yeah. I mean, I think if you're gonna start a pilot in September and want to be fully live by the end of October, that's really aggressive in, in my mind of how we've rolled things out in the past and what we've had success in rolling out.  
I I think I again. I wasn't on every call. I thought the product for the PIL be ready a little sooner for us to kind of roll out in September.  
I see a rollout process of probably you know.  
I think I think we could probably tighten the pilot up, make it quicker, but I think the rollout process needs to be at least like kind of 30 days or so from from start to finish. When you think about kickoff.  
Work day training.  
Leadership workshops, you know, a site level account manager, workshops and then kind of the post live.

 **Jonathan Aulson** 12:32  
Hmm.

 **Smith, Jeremy** 12:32  
Handoff there.  
Just you know that's that's kind of how we've how I look at it.

 **Esposito, Ryan** 12:39  
Does the pilot need to be 45 days?

 **Beamesderfer, Chad** 12:39  
I.

 **Esposito, Ryan** 12:41  
And the reason I say that.

 **Smith, Jeremy** 12:41  
No, I I don't think so.

 **Esposito, Ryan** 12:45  
No, I'm saying does it because I'm just hear me out.

 **Smith, Jeremy** 12:46  
Yeah.

 **Esposito, Ryan** 12:47  
I don't know if this is accurate. Like do we want them to build to to work in it right?  
Build their forecast.  
Work through it for a month.  
Go all the way through, close and really pull up and understand that.  
Like the inputs and the outputs and they all made sense.  
And we where we finished is where we thought we were.

 **Smith, Jeremy** 13:02  
Yeah.

 **Esposito, Ryan** 13:04  
Or now that we see the the the like the end results and what actually posted.  
Do we need to now think about training differently?  
I don't know.  
I'm just wondering if we wanna see the process all the way from.  
Basically, a commitment through a final flash to understand if there's anything that comes out of it.

 **Smith, Jeremy** 13:27  
Yeah, I mean that.

 **Esposito, Ryan** 13:27  
Just a thought, I could be way off base.

 **Smith, Jeremy** 13:27  
That's best case scenario, right?

 **Esposito, Ryan** 13:29  
I'm just thinking out loud.

 **Smith, Jeremy** 13:30  
Yeah. And that's that's kind of how I thought about a best case scenario was that's why it's kind of landed on 45 days of from first forecast to the actual did it work.

 **Esposito, Ryan** 13:34  
Mm hmm.  
Yeah.

 **Smith, Jeremy** 13:40  
You know, what did we learn?  
What we do adjust before rolling out to everybody.

 **Suarez, Adam** 13:44  
So yeah, we want to align like no matter what cadence we decide here in the next like 2 hours on the next call, I think you'd want to.  
You'd want to roll it out for a pilot standpoint about a week before you start a month.  
That way you give them seven days to make that initial forecast, and then you can compare that that month.  
So give them a little bit of time ahead of time to make that so we could look and roll out.  
Looking at this graphs, I guess like the end of what's that July for a pilot?  
Or end of August.

 **Sowells, Amy** 14:18  
I don't think the system will be ready yet though, right?

 **Suarez, Adam** 14:21  
So.

 **Sowells, Amy** 14:21  
Or could we do the end of August?

 **Suarez, Adam** 14:23  
End of August maybe?

 **Jonathan Aulson** 14:26  
September 1st is when we're wrapping up development and and so we're looking at you know September 1st for development to finish and then two weeks of testing. And so I wouldn't, I wouldn't be you know if we if we're considering the full set of features, right as as.  
What we wanna pilot with.  
Now we could look at that and maybe see if there's a a set of features we could pilot with. That's not the the MVP list we've come up with.  
But I wouldn't plan for a pilot on the full list until at least September 10th here.

 **Beamesderfer, Chad** 15:05  
And so in taking that, that would almost.  
Be you'd almost want to use October as the pilot month, but then you lose 15 days and and then again. For those that have been here longer than I have.  
But October is like peak planning time, and I just think we should be cognizant of October. Last October, my 1st October.  
Here we were on the road, along with the people doing this for weeks at a time.  
For budget and planning.  
So that's just I don't wanna derail this, but I just keep that in mind.  
That was a huge undertaking last year.

 **Sowells, Amy** 15:45  
Yeah. I mean, are you?  
Yeah. Are you guys gonna be? You're you're in the middle of budgeting travel that time period. Right. And Jeremy.

 **Beamesderfer, Chad** 15:50  
OK.

 **Esposito, Ryan** 15:51  
Let's let's be honest.  
Yeah, yeah. It's gonna be it. Yeah.

 **Sowells, Amy** 15:56  
Jeremy, I'm assuming you're aligned with Brian, where we don't really want like if it trickles into mid November, we might as well wait until after the holidays because.  
There's not a lot we can get done between end of November and end of the year.  
Is that, do you agree with that?

 **Smith, Jeremy** 16:17  
Yeah. I mean once you're.  
Yeah, I mean that.  
That posesselt it's it's a bunch of different problems, right?  
'Cause then people are out.

 **Sowells, Amy** 16:24  
Yeah.

 **Smith, Jeremy** 16:26  
People are are are not available.  
Something doesn't work.  
People are on vacation.  
Now, starting January with a new forecasting tool will be awesome, right? But.  
I.  
Yeah, to do this right with a rollout, which we've seen success like again, I haven't.  
I don't know enough to know what how different it is.  
We could we obviously if someone if Brian comes back and says it needs to be installed by October 30th, we'll build a, you know, speed version of getting this rolled out to everybody.  
But to do it right, I would think at least 30 days for pilot and then another 30 days for roll out.

 **Sowells, Amy** 17:13  
Yeah.

 **Smith, Jeremy** 17:13  
Out just from 'cause look, we know to have 700 account managers do a training is gonna take time, right for everyone to schedule individual workshops that come together and build their first forecast is gonna take time.  
It's why I kind of lean towards that mid late September date because all the account manager, all the district managers are gonna be together anyways.  
So you could do a good workshop with them so they know how to lead it in their markets and then take it back there after those qbrs.  
The only other option would be to tackle.  
Go onto.  
The planning session that Chad talked about, which is in mid-october.  
The 22nd, I believe and.  
Do a workshop with DMS, then and then they go back first week in November and build their first forecast in November 15th is their first forecast right with the new system and that's another possibility.

 **Sowells, Amy** 18:08  
Mm hmm.

 **Smith, Jeremy** 18:09  
That gives us a little time if we do September.  
As a you know.  
A pilot period.

 **Sowells, Amy** 18:20  
That could work.

 **Smith, Jeremy** 18:21  
And I mean it won't be perfect, Adam, to your point from a mimicking what the process will be from month to month of you know first forecast is due you know 15th of the prior month and then weekly it might not be perfect lined up but we can.  
Work towards that as well and try to figure that out so you know, it'd be great if we could do, we could start a pilot.  
Yeah, I think through that 'cause, you'll need time for training and things like that.

 **Sowells, Amy** 18:46  
OK.  
Yeah, I'm pretty sure Brian is like gunning for that end of October live date.  
So it's like we kinda have to just figure out the best.  
Solution for that, but Jeremy it is very simple so it's gonna be very refreshing I think to the IMS.

 **Smith, Jeremy** 19:01  
Mm hmm.  
Yeah, I think there's there's two parts to it, right.  
There's the train on the system, which is usually the easier part, but you're also using this opportunity as change management for how the team thinks about forecasting, what their rhythms are and things like that.  
My my off base there.

 **Sowells, Amy** 19:21  
No, no, no, no, I yeah.

 **Smith, Jeremy** 19:23  
Yeah. So that's the hard part, right?  
And that's what requires the in person meetings, the workshops that kind of the reset and the reset of expectations and a change as Ryan can test, you went to a bunch of the Legion ones, right?  
Like it was less about. Here's where you, you know, approve a shift of this box.  
It's more about like the change management of how you think about.

 **Sowells, Amy** 19:43  
Yeah.

 **Smith, Jeremy** 19:43  
Time keeping and scheduling right? And that's the same thing we think we're trying to accomplish here.

 **Sowells, Amy** 19:48  
Yeah. And so to Adam's point, we have a meeting later today regarding the overall cadence that's going to be required in the new system, whether to keep it like we have it today or whether to require AMS to actually forecast for an entire quarter and then it.

 **Smith, Jeremy** 19:54  
Yeah.

 **Sowells, Amy** 20:03  
Gets locked. So if that if it's the latter that's going to be even more so of a shift.

 **Smith, Jeremy** 20:08  
Yeah. OK.

 **Sowells, Amy** 20:10  
For them.

 **Smith, Jeremy** 20:11  
So I think that'll be that'll be a key topic, right?  
So look, I think we have from what I put together a framework, how we speed it up or or spread it out is will be based on two things.  
It'll be based off of. We should lock in a when we believe the system will be available to us to start training on, and if that's the 15th of September because we're built the first two weeks for testing, we can get Chad and Ryan.  
And and Chris and and Tia in there on the 15th to Start learning.  
That.  
That that's the first goal post and then the second one is.  
We have to have it done by November. The November's forecast per per Brian.  
And then we, we take this framework, we we we apply it and we make it either tighter or longer or whatever it needs to be. And we work a little harder.  
But I think that's the I think the the drop dead date to your point of from a time of a year perspective is it has to.  
Be rolled out in, like November's forecast.  
Needs to be kind of the OR December's forecast in November needs to be the first time because once you get to Thanksgiving, it's over for the year, right?

 **Sowells, Amy** 21:17  
Yeah, yeah.

 **Smith, Jeremy** 21:17  
I understand everyone's going to be working on budgets and planning sessions and things like that.  
The good news of that is people are coming together so you can piggyback a little bit.  
The bad news is they're doing a lot of stuff outside of their normal business and already so we'll have to kind of figure out how to layer that and work with Anna and her calendar on that.  
I've already looked at it and saw kind of what's what's coming.  
But it is a good opportunity because we're already getting people together.  
To not have to get people together more, right?  
I think that's the bonus to it.

 **Sowells, Amy** 21:43  
Yeah, yeah.  
Makes sense?

 **Smith, Jeremy** 21:48  
Yeah.

 **Jonathan Aulson** 21:50  
Very good.  
Well, it sounds like there's a key meeting today where we're going to learn a little bit more about about this, that could influence some of these conversations.  
I think I think that you know, September 15th, that's a good date for us to plan on in terms of you guys actually getting in and and you know starting to train or or or those activities.  
So that's that's a key take away I think.  
Let's see.  
And I think the in terms of in terms of the roll out, I I think I I heard kind of Big Bang as a as a thought for that. Is any any other kind of like considerations you guys have around that roll out?  
It sounds like we're gonna be preparing for it with a pilot pretty well, but I I'm not sure.  
You know what?  
What other conversations have you guys had about that?

 **Smith, Jeremy** 22:45  
Yeah, I'll share the second part of my screen again.  
So the way we look, I look at it is.  
Kick off right regional calls East Central W, where we get on. Explain what's happening.  
Explain why it's important to them and then give them a view of what the next of the what the what the rollout looks like, right?  
Then they're immediately assigned the training as soon as they hang up the call, right?  
So they can take the online training, familiarize themselves with the basics on how the system works.  
Again, from what I'm hearing from Amy and everybody else, it'll be a pretty simplistic training.  
We may layer some more stuff on top of that and try to use an example as a chance to kind of refresh on all forecast training.  
We'll talk about that internally and then we kind of look at it and what we had success of before was kind of AQ.  
Workshops, right?  
A leadership workshop at the vice president and district manager level, where we're explaining them how to lead this process.  
Right. How to lead their their forecasting kind of program?  
In their district. And then they take that back and they host a workshop where they're building that first forecast together as a group and then from there it will be just continual follow-ups on how it's going.  
You know, that's really take a big piece of this of, you know, are the adjustments working.  
How is that?  
And again, they're going to figure out what the process is going to be later today on those monthly forecast weekly adjustments and then that full hand off.  
To the function owners.  
Field of where we roll this out, we implemented it. We feel good.  
We're moving on.

 **Suarez, Adam** 24:24  
So I have a question, probably more for Jeremy, Chad and Ryan.

 **Smith, Jeremy** 24:29  
Yeah.

 **Suarez, Adam** 24:31  
So thinking about the timeline of rolling it out right, so we're gonna roll it out, let's say September time frame, right?  
Would there be? I could.  
I think I could go both ways on it. Would there be a benefit instead of starting their forecast?  
In the new system to, let's say, budget or blank, would it be beneficial to input?  
To import some of the stuff that they already had forecasted for Q4.  
Into the system. One thing I can say, OK.  
That's a benefit because some of the account managers should say, well, I already did this in my Excel file, but the other benefit is like you almost could go the other way and say you don't want it to do that, to force them to use this new system.  
In its entirety from start to finish for a full forecasting period, any thoughts on that?

 **Beamesderfer, Chad** 25:20  
Mommy. Oh, God, Ryan.

 **Esposito, Ryan** 25:21  
I guess I'm. I'm with your ladder. A point there and I think a lot of it goes like the change management, right?  
Like what they did to get their Q4 forecast. We know right now is never really that accurate.  
Like in general, like our forecast.  
So I think starting with a clean slate, whether they did or they didn't do anything in Q4, I think getting the behavior changed on the new system and how we do things differently.

 **Smith, Jeremy** 25:44  
Yeah.

 **Esposito, Ryan** 25:46  
Is probably more impactful than already loading stuff that that they did the old way.  
That's my opinion.

 **Beamesderfer, Chad** 25:54  
Yeah, I know.

 **Jonathan Aulson** 25:54  
And also, oh go ahead, sorry.

 **Beamesderfer, Chad** 25:57  
Sorry, I was going to say if it's very simplistic and I think as long as the training really says, if you do this, this happens.  
I agree. Starting from a blank slate is better.  
So there's no preconceived notion, and let's just be honest, it's a lot easier to tell when someone did something when there's a blank sheet on the back end.  
So I I like the idea of a clean slate as well.

 **Suarez, Adam** 26:21  
And then I guess so I think that differs a little bit than what we originally talked about.  
Jonathan, right. Because we said we're gonna set things to budget.  
So for the initial rollout, I guess could we set it to blank?

 **Beamesderfer, Chad** 26:34  
Well, sorry, let me let me caveat that. I think budget has to exist, right, set to budget is the starting point.  
I I thought we're talking any forecast changes they made.  
I think the budget is the budget.

 **Smith, Jeremy** 26:47  
Yeah, I would have it set.  
I would have a set.  
How it's gonna be set moving forward every month from here on out, yeah.

 **Esposito, Ryan** 26:51  
Mm hmm.

 **Suarez, Adam** 26:53  
OK.

 **Jonathan Aulson** 26:55  
Yeah, we we are planning to pull in the budget data.  
We we don't have plans in that timeline to pull in forecast data. So that would be an additional piece for us.  
So it sounds like that lines up with what you guys are are talking about, Yep.

 **Smith, Jeremy** 27:07  
Yeah.

 **Suarez, Adam** 27:11  
OK then.  
Yeah, that makes it even easier.  
So not an extra feature.

 **Jonathan Aulson** 27:14  
Yeah.  
All right folks.  
So it feels like we have a good kind of initial game plan to to start working on here.  
Is there any part of this that we didn't cover or need to explore a little more?

 **Beamesderfer, Chad** 27:39  
The.

 **Jonathan Aulson** 27:39  
Sounds like we're gonna get some.  
Oh, sorry Chad. Go ahead.

 **Beamesderfer, Chad** 27:42  
Sorry, only call and this is more for the town park team.  
The only based off the last call we had with last week with Mike on not wanting to forecast one month at a time.  
I just want to make sure we keep that Cognizant.  
Maybe the pilot's one month, but I just want to make sure we're all clear that really we should be looking at that quarterly view.  
I think the pilot's OK is one month 'cause we have to test it.  
I just wanna keep that one top of mind for us that when when we do this, we really wanna look at it in a 90 day cycle, not a even a 30 day.

 **Sowells, Amy** 28:11  
Yeah, we're gonna, Chad, we have that call later today to confirm that.  
And then we will. I'll, I'll keep everyone on this call in the loop.

 **Beamesderfer, Chad** 28:19  
Thank you.

 **Esposito, Ryan** 28:20  
Cool.

 **Jonathan Aulson** 28:21  
You know, I do have a question related to that and Amy and Adam, I I, I.  
'M does that change how we think about this input form that we're we're we're planning to start working on this well we we started the Sprint for this guy already, but does it change the idea of selecting a month at a time here or would we still OK.

 **Sowells, Amy** 28:44  
Now.

 **Suarez, Adam** 28:46  
Yeah, I would say no, no as well they still.

 **Jonathan Aulson** 28:46  
OK.

 **Suarez, Adam** 28:48  
They'd still do it on a monthly.  
It would just be three months versus one and I would still want to have like the one month drop down just for space.

 **Jonathan Aulson** 28:56  
Cool. OK.

 **Sowells, Amy** 28:57  
Yep, agreed.

 **Jonathan Aulson** 28:57  
Makes sense to me. Yep.

 **Sowells, Amy** 29:00  
Did we?  
Did we finalize and maybe we don't need to yet?  
The districts.  
The pilot districts.

 **Smith, Jeremy** 29:08  
No. We can talk about it.  
I I briefly mentioned it.  
I mean just thoughts from again from what we saw from previous rollouts and engagement and success.  
I.  
Long Island, Dallas, Orange County or three that came to mind.  
Chad, you know whether me, I don't know if we can ask even though they're salaried leaders in California to do more outside of their the day-to-day.  
So, like if they would have to fill out the forecast sheet twice like, does that cause issues in California?

 **Beamesderfer, Chad** 29:32  
No, that one doesn't.

 **Smith, Jeremy** 29:33  
That's what but, but thinking through, yeah, I always ask for California. You never know.

 **Beamesderfer, Chad** 29:36  
Good. That good question though.

 **Smith, Jeremy** 29:39  
But those are three akin to mine.  
But you look, Ryan. Chad, you're more in tune with the leaders and what they have going on and what they can accomplish. But that was just those are three that you know T and I had popped it in front of mind.

 **Beamesderfer, Chad** 29:53  
Can I ask you?  
Was the Target 3 districts? Did we have a a target number?

 **Smith, Jeremy** 29:56  
One for each I was thinking.  
One for each, one for each region.

 **Beamesderfer, Chad** 30:00  
'Cause so this just my thoughts, but just to I I almost wonder if we have a high performing and a low performing district to get the nuance because I think when we pilot with our top districts, we get a maybe a good outcome that may be because it.

 **Esposito, Ryan** 30:00  
Mm hmm.

 **Smith, Jeremy** 30:04  
Yeah.

 **Beamesderfer, Chad** 30:22  
Very good district, I think to get a true understanding of the file, we should have one good district that we know will will follow suit and and has things under control and one that is not maybe at that level because seeing the disparity, one, I don't think it.

 **Smith, Jeremy** 30:24  
Yeah.

 **Beamesderfer, Chad** 30:37  
How easy it is if they both end up in the same area, that's a good sign for the product, but I'd rather not just put three All Stars in and say, oh, look, it's great when they were going to be good no matter what.

 **Smith, Jeremy** 30:42  
Yep.

 **Beamesderfer, Chad** 30:49  
So just my thoughts.

 **Smith, Jeremy** 30:49  
Yeah, but that was Tia's recommendation too.  
My worry is when you use a not strong district you get no results or no data, right?  
Because they just don't. They they don't participate as well as you want.  
There's always an excuse.  
There's something that comes up.  
They're in the operation, right?  
That's why I tend to lean towards like within within every district, even the strong districts. There's account managers that aren't as strong as others at performing this.  
But I I look more to district managers that can.  
Follow up and make sure that we get what we need.  
And are are, have are, you know are leading that charge.  
That's, that's where I land.  
But I I hear your point and and you know Buzzi also think in each market there will be a few account managers that aren't at the same level as other ones.  
But I'm open up I'm. I'm open.

 **Beamesderfer, Chad** 31:34  
I can see.

 **Gonia, Tia** 31:35  
But.  
But Jeremy just said what is what I was going to say.  
You probably know what sites within a district don't perform well, so you can know that those are your low performing. So you can pay more attention to those as well because we were trying to also pick districts that aren't just ballet or hospitality, we also wanted healthcare so.  
We can see the differences with that as well, so we can make sure the product works for all our different business types.

 **Beamesderfer, Chad** 32:03  
Mm hmm.  
To get .2.  
The the spread of types of accounts which.

 **Gonia, Tia** 32:10  
And all those things is what we are kind of trying to balance.

 **Beamesderfer, Chad** 32:13  
And that would almost eliminate Orange County. Jeremy 'cause. That's all hospitality now.

 **Smith, Jeremy** 32:18  
Yeah, well, that's all we picked on.

 **Gonia, Tia** 32:19  
Which is why.

 **Smith, Jeremy** 32:19  
We picked Long Island because it's all healthcare.

 **Beamesderfer, Chad** 32:22  
So got it OK.  
So you're you're almost not interdistrict.  
You're spreading.  
You're gonna get each coverage type across. OK. I gotcha.

 **Smith, Jeremy** 32:28  
Yeah.

 **Gonia, Tia** 32:29  
We wanted a district in each region. That way the Rfd's and RF NS had usage in the product with account managers, so we weren't just piloting in one and only the two finance people had that.  
Usage with actual account managers.  
We wanted to make sure all of our subject matter experts are going to have that with people piloting. So that's why there are three and that's one or two.  
Just you have a little bit more background on the three.

 **Beamesderfer, Chad** 33:06  
I think that can work.  
I like the idea of we know there's underperforming, so if it's OK with you, Jeremy, I'd like to look at our districts because I almost want to stay away from Orange County, not because I don't think they'll do a good job.

 **Smith, Jeremy** 33:14  
Yeah, please.

 **Beamesderfer, Chad** 33:18  
It's just there aren't low performers there.  
I'm thinking more of like at Denver, but let me let me take that back to you, Jeremy.

 **Smith, Jeremy** 33:21  
OK.  
Yep.  
Denver was one of our other option or we were at Denver's.  
They they were.  
Some of them were burned a little bit 'cause they were part of a too soon Legion pilot.

 **Beamesderfer, Chad** 33:33  
Yeah, I know.

 **Smith, Jeremy** 33:35  
Like a year before, we were ready to do a pilot.

 **Esposito, Ryan** 33:35  
Ha ha.

 **Sowells, Amy** 33:37  
Yeah.

 **Smith, Jeremy** 33:37  
They did a pilot on region, right?  
So some of them probably have a little little scar tissue still, but I mean that Erin's one that gives great feet.

 **Sowells, Amy** 33:40  
It's.

 **Beamesderfer, Chad** 33:44  
Full life. The bad things that amount.

 **Smith, Jeremy** 33:45  
Aaron's not afraid to give feedback, so he's also one that'd be a a good option as well.  
But yeah, I'll again.  
Same with Ryan.  
Same with you.  
I'll lean towards you.  
We'll lean towards your judgement on on Pilot District.  
But those were our initial recommendations.

 **Esposito, Ryan** 33:57  
You have Dallas for the central right.

 **Smith, Jeremy** 33:59  
Yeah.

 **Esposito, Ryan** 34:00  
Yeah, I'm good with that.  
It's big and it's got a lot of scope now. Would we just do Dallas?

 **Smith, Jeremy** 34:03  
Yep.

 **Esposito, Ryan** 34:04  
That would they've split.

 **Smith, Jeremy** 34:05  
Just hospitality.

 **Esposito, Ryan** 34:07  
Got it. OK.

 **Smith, Jeremy** 34:08  
Yeah, just like that was proper.  
Not Dallas healthcare.

 **Esposito, Ryan** 34:11  
Yeah, I think that sets fine with me.

 **Smith, Jeremy** 34:13  
Yeah.  
OK.  
Cool.

 **Sowells, Amy** 34:20  
So, Jonathan, when would we have another one of these calls?

 **Jonathan Aulson** 34:26  
I think it sounds like we may want another one of these after we have some of these decisions made this week.

 **Smith, Jeremy** 34:33  
Yeah.

 **Sowells, Amy** 34:34  
Yeah.

 **Jonathan Aulson** 34:35  
Would would next week make sense for you guys?

 **Smith, Jeremy** 34:37  
Yeah, I think I think after your call today, Amy and Adam, Amy, maybe me and you huddle with Brian and understand expectation from a get an official like you need to be live by the state.  
And then we plug plug our plan and see how we make it work within those times and what needs to be tweaked or not tweaked and then we can come back next week with a A formalized plan with a, you know tentative.

 **Sowells, Amy** 34:50  
Yep.

 **Smith, Jeremy** 35:02  
Timeline.

 **Sowells, Amy** 35:03  
That sounds good.

 **Jonathan Aulson** 35:08  
All right folks.  
Sounds like. Sounds like we have a. We have a plan.  
That's excellent.

 **Smith, Jeremy** 35:13  
A plan to make a plan.

 **Jonathan Aulson** 35:14  
Well, yeah, please.  
So I think I think it sounds like we'll wait to kind of hear words that we're ready for the next installment of this. And then I'm happy to, you know, get on people's calendars and we'll get this group back together.

 **Smith, Jeremy** 35:29  
Cool.

 **Jonathan Aulson** 35:31  
Awesome, alright.

 **Sowells, Amy** 35:31  
Thanks guys.

 **Jonathan Aulson** 35:32  
Well, thanks very much everyone. Yep, thank you.

 **Suarez, Adam** 35:33  
Sounds good.

 **Esposito, Ryan** 35:34  
Yep, see you guys.

 **Jonathan Aulson** stopped transcription