Corporate Narrative Launch Standup

Brian Bachofner with jmioeg.com
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Participants

SERVICETRADE

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OTHER

Mike DiPietro

Topics

Transcript

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SHAWN

0:01 The most Monday?

SHELLEY

0:05 Three days and one.

SHAWN

0:08 I'm sorry, I have not made any meeting for the res of the day too. Hey, Amy, I've been for the rest of the day. So, I'm not gonna, I can get to that messaging stuff probably first thing tomorrow morning, but I have spent all my time chasing down what when?

SHELLEY

0:21 If you can do you, if, yeah.

SHAWN

0:26 Put whatever you want to in.

JED

0:28 And...

SHAWN

0:29 I will spend time tomorrow morning as I do with my early morning times and like get that stuff that next phase just yeah.

SHELLEY

0:39 I understand. So.

AMY

0:41 Like you're in a very serene location.

SHELLEY

0:46 It's quite nice. It's beautiful out today.

AMY

0:49 Very pretty.

SHAWN

0:52 Speaking of quite nice, Shelly, I used your cuss joke. I always use cosco joke. I used it yesterday, us cus, involve someone just said someone about something about nice rice and I was like that's us.

MIKE

1:05 The right. So nice. They named it twice... that's a dad joke if I ever heard one.

SHAWN

1:13 Is right there?

MIKE

1:16 Hi Amy.

AMY

1:18 Hi, how are you doing? Mike?

MIKE

1:19 I'm doing well.

JED

1:25 Hey, good afternoon.

MIKE

1:27 Hi, Jack. Nice to meet you.

JED

1:29 Nice to meet you too. Mike. Shell. You look like you are in a perfect setting on a gorgeous daylight today. Gosh. That's jealous.

SHELLEY

1:37 Fully indoors, working outdoors as much as possible.

SHAWN

1:40 Guess I should open my windows.

JONATHAN

1:43 Here we go.

MIKE

1:46 All right. So, do you wanna kick this off? So, or do you want me?

SHAWN

1:51 Why don't you, why don't you Ike?

MIKE

1:54 Right. I just need to get the spreadsheet open. All right. So, Amy, you and I have met before Jed, we have not, I am, I work for JM I, I'm one of the operating advisers. I focus on marketing. So, I've helped the team since the beginning on various things. And with this big kind of corporate narrative... new positioning project that's being done... Brian asked me and a few others to get involved just to support the team. And one of the work streams I took was to help manage the launch plan to make sure we're gonna talk about ourselves differently that we're all coordinated. We're all we're we know what needs to change and we're doing it in a certain way and we launch and we start saying, you know, new words on X date and, you know... our career site has changed and our, you know, our materials to go out to customers are changed et cetera. So... the process that I use is not rocket science. It's a simple spreadsheet checklist with a bunch of stuff, but wanted to walk you and Amy through kind of how we're thinking about this. Jonathan has already been involved in this as has Shawn and Shelly. But the idea is we've got a bunch of tasks that we think we may wanna do and we wanna make sure and check in with you guys and say, do you agree that these things should be done? And also give you knowledge of what marketing and sales enablement is doing? And then if we agree to certain things, then say, great, can you guys is give us an owner and give us a basic date which would be, you know, can be as simple as launch minus two weeks launch plus two weeks et cetera. And so the exercise today is just to go to a, through this at a high level, give you exposure to that. Anything you can give us an answer on right away? Great. If you need time to think about it, that's fine as well. And then we will probably get into a cadence on this to just connect on a half an hour basis. Hopefully we don't even need a half an hour just to keep all of us honest and on track and aware if anything's changed. Okay? And to give you a little bit more context of what we're talking about. And I think you guys are probably aware but this is where we're going to have new pillars. This is essentially done to accommodate more of a focus in mechanical, focus on beating BuildOps and bringing in Asurio, and Northboundary, is it called? Right? Bringing in those products and kind of reframing and making a little bit more effective, how we describe why people should implement a solution like service trade and why they should choose service trade over others? Okay? And, you know, what's the keywords where the key pillars et cetera, and that work is being done by a firm called innovate map and they're almost done. They just delivered the first draft and so we will hopefully be able to share, I think within the next week and a half or so with a broader group, what those words are. But in the meantime, we just wanted to get organized on whatever the words are. We know we're gonna make some changes.

JONATHAN

5:45 So let's plan for that?

MIKE

5:47 Does that all make sense? Or do you have any questions before I get into some of the details?

SHAWN

5:53 Can I add one more?

MIKE

5:55 You can add two or three things if you want.

SHAWN

5:57 It actually is about two things, but Shelly has her hand up politely and says jumping in. So maybe she always has.

SHELLEY

6:03 I was applauding, I thought Mike said beautifully, but I would love to hear what you have the ad.

SHAWN

6:07 Okay. To, on a tactical not to give you an idea of the, to get your brain turning on some of those things that might need to change historically. We haven't had a fully flashed out corporate narrative, but we've had two things that have filled in that place that have probably seaped into, you know, our collateral and various things. Now, some of these, what is our mission statement, right? We help commercial service contractors do the thing that they, we help them do. And then the value pillars of streamline operations impress customers and grow your revenue. Now, this corporate narrative in a lot of those places will, it will definitely replace those old value pillars if those are in any of these pieces of collateral training, whatever certification... you know, HR documentation. The mission statement will probably still need to stay in some places especially on your side, Amy, but the corporate narrative might replace it in others where it's more appropriate. So external facing things perhaps. So just wanted to get that because we're not going from old narrative to new narrative because there wasn't really an old narrative. We've used these other things to hodgepodge one. And so we have to be a little bit thoughtful about that. Jed. I suspect most of the places where it's mission statement and pillars that will all get replaced, Amy for you. Mission will be a little bit like we'll have to be more thoughtful about that.

AMY

7:43 Yeah, makes sense.

MIKE

7:49 I...

JED

7:51 Really, is that just the first one? Did you have two things you're gonna?

MIKE

7:54 Were the...

SHAWN

7:54 Two things that was, I was just gonna say if I do bring one thing to the table, it's a lot of years of context.

JED

8:01 Sure. Sure. Yeah, that's super valuable. Well, I'm interested, you know, when we get to the point, we can share like what the firm is working on and kinda just tack like what are some of the words and things and themes? You know, they're coming out of that? Because I've had thoughts on that over the last year and a half to. So I mentioned that, but also just kinda when's the, is there a target date for when we're gonna launch?

MIKE

8:26 Great question. Jed. So right now we're targeting when QR is, which I think April, the week of April nineteenth was the date if I'm not mistaken... and that I think Anna was gonna get back to us on what the exact date was.

JED

8:48 Is that for external launch too or just internal?

MIKE

8:52 And then we would align to that and figure out what are we gonna launch externally on that date? And what can lag? So not all materials have to change, but for materials such as here's, your new powerpoint here's. What we want you to say when you say here's, who service trade is here's. What it says or part of the website needs to say the same thing, right? A boiler plate on a press release probably needs to say the same thing. So, there are some things that we're gonna choose and it's gonna be hard for you guys without even seeing what this looks like to know.

--- Pricing ---

MIKE

9:26 But what we'd like you to think about is what needs to change on launch? Okay? Versus on launch and spell, you know, plus three or plus four plus six weeks, whatever.

JONATHAN

9:42 It.

SHAWN

9:42 Is there's another important date on here? Which is April 20 fifth, which is now when the company meeting is scheduled, I believe.

--- Pricing ends ---

SHAWN

9:50 And that will be another like QR is we will definitely be telling sellers about it then I'm sure more like there will be a broader announcement at the company meeting to everyone internally. But sellers starting on the nineteenth will be starting to... speak this language. And so website, some things on the website should be expected to parallel that starting.

--- *Implementation and ongoing support* ---

JED

10:17 Well, it's a good point. I mean, so my team, I mean, they're not just a handful of folks from my team are in QR. So we'll need a different event or training.

MIKE

10:29 Yeah, maybe that, that's what we need to do. And in here, you'll see we've got do we need CS training on new messaging for instance, so that's what we can choose.

--- *Implementation and ongoing support ends* ---

MIKE

10:39 So we don't have this all button down as you can see, we're not delivering you guys a very prescriptive here's. What it is, this was intended to get that process started. It obviously all triggers off of what the launch date is. We assume April nineteenth for right now, but we've got a meeting with Anna mid this week and we really should probably try to.

SHAWN

11:03 That.

MIKE

11:04 Down it does most important is getting sales up to speed on that. So, but it's gonna be around this time.

AMY

11:12 Are you all looking so like right off the top of my head? Obviously, I can think of stuff that needs to be on here, right? Like Shelly like linked LinkedIn, Glassdoor rep, view... stuff like that. Is that the develop list of HR?

MIKE

11:32 Star crunch base, LinkedIn both LinkedIn homepage, as well as LinkedIn individual people having all of every, all the employees changing their stuff or at least customer facing employees. So, yeah, a lot of that stuff. So the way we did this is there's a marketing tab. Okay. There is a, this is something that Jonathan is still working on. This is going to be identifying kind of all of the current content and what needs to change. And then Jonathan, you're gonna put your sales tasks in here as well, correct?

JONATHAN

12:15 Yup. Right?

MIKE

12:18 But yeah, a lot of that stuff should be in here and then we just took a step. Let me just go to the ones that we have you guys marked at. So Amy, we thought someone on your team, any third party hiring sites, career sites, you're probably gonna wanna change the language on the, who is service, trade, job description, templates, any active job descriptions if you want to go and change those as well? Maybe your employees onboarding materials as well. I don't think this is all stuff that like has to happen right on launch, but it should happen fairly soon thereafter, ideally. So there's not a lot of disparate information.

AMY

13:06 That makes sense because we mirror our LinkedIn careers on review, for example, right? And so we manage review, but we all over what's already been written on our LinkedIn careers. So that would fall under the manage the third party hiring sites.

JONATHAN

13:26 Yeah. So.

MIKE

13:26 Let me just, let me just choose the ones that we have for you right now. Yeah. So that's it. So it's recruiting it's really just these things. If there are other things. So what we'd ask you to do then Amy is if you can go through and choose if you want someone else to do this and then you want to even delegate this whole thing to someone else and have them come to the launch meetings. That's fine with us. We don't care. We do want one person though who can kind of represent. So whether that's you or someone else. And then any of these changes, but also just add anything else that needs to be changed in your opinion. Okay? And give us a timing on what you think you can do, launch plus or minus. Okay?

AMY

14:13 Got it. Okay.

MIKE

14:16 And then Jed same thing on your side?

JED

14:22 I don't think this document has been shared with me. I was just searching for it and looking on the slack thread. So if you could add me to it please?

MIKE

14:30 You do, I think you're the owner, right? We'll do. So this is what we had for you.

JED

14:46 Okay. It's kinda hard for me to, I mean, I'll think of it, this all I think makes sense, but... without knowing what we're changing.

MIKE

15:00 Yeah. Well.

JONATHAN

15:01 I, I've been in the same boat and so my approach has been to kind of thing kind of catch a wide fishing net, think about probably more stuff that's what I've been doing because yeah, I bet. And then once we see it, that list will probably shrink down.

MIKE

15:17 Good. Ask innovate map for what a sample of their deliverables will look like. So at least you guys know what type of information is going to be shared and haven't heard back from them though they did share some stuff. So we should also Shawn, we should probably maybe even just share with these guys where we are right now, as long as we're just careful about not rolling it out too soon. So if you guys have ever been involved in this, it changes you don't want like you don't want to trickle it out. You want to do a proper roll out. So as long as we just kinda keep it to a small team.

JED

15:54 So...

MIKE

15:56 You guys could start to see what...

JONATHAN

15:57 Deliverables are?

JED

16:00 I understand the confusion. I can happen if you start. So I mum's the word, but it'd be helpful.

MIKE

16:08 Okay. So why don't we do that? Then we will share this document with you. We'll share the sample or where we are of what the deliverables will look like. And then if you guys can just start filling this in with whatever else it is and also take a look at what else is on here. I don't know that we need to take up everyone's time going through the entire list, but you can see what else the plan is. Okay, what marketing is doing mostly and you can get a sense and you can see really Shelly has done a ton here with filling out all the stuff that will change on the marketing side... you know? And then if you have any questions, you can let us know or if you think we missed anything, you can let us know as well.

JED

17:08 And is there another meeting? Is this a recurring meeting? So should we try to do as much as we can before next Monday at this time?

MIKE

17:17 So we did set this up to be weekly, correct, Sean for this group?

SHAWN

17:22 Confirming right now, it should be weekly.

JONATHAN

17:24 Yeah, yeah.

JED

17:26 I guess I could have looked at my calendar before asking you that was.

MIKE

17:28 No, it's.

SHAWN

17:30 Got me wondering. Why did I set it up as weekly you?

MIKE

17:35 Yeah, yes, view series. Yes. Okay. So, yeah, if we can do that for next. So we'll get you guys some more context information. If you can think about this for next Monday? That would be great. I am unfortunately bad timing, but I'm on vacation the next two Mondays. So, Sean, well, if you don't mind, you'll have to run this meeting the next two weeks.

MIKE

18:03 I think that's it for Amy and Jed, if Jonathan Michelle, if you guys want to stay on, but unless you, Amy and Jed, unless you have any questions?

AMY

18:14 Good.

SHELLEY

18:15 Thank you.

MIKE

18:16 All right. Awesome. Thank you.

SHAWN

18:18 Thank you.

AMY

18:19 Thank you.

SHAWN

18:20 Jed, and so real quick. Okay. Well, I'll share with you all like instead of this big hunk in document that the innovate map has prepared for us for this, I'm just gonna show you like, hey here's, kind of what our corporate stuff looks like today here's what we're moving towards... it's not super far from where we are today. So it's not like this big massive change. The words are different, much more clear. It is far, it's a big improvement but it's not leaps and bounds. We're not pivoting in the market or anything. So.

JED

18:52 Okay. All right. Cool. Good. I've got access to the documents. So I'll take a look a little bit today and I'll fill out what I came for next week and whatever you can share on the other, Shawn, it'll be a little helpful too.

MIKE

19:04 Thank you.

JED

19:05 Awesome. Thanks.

MIKE

19:06 All right. Great. And then Sean. So, so Jonathan and I did have a call and he was asking for that context that's why I asked Lena for that. I haven't seen it back to you. Do you think you have something that's good enough to share with these guys that they'll get a sense of what we're gonna do? Yeah. Okay. And then I think we should also put in this document when we are going to go through like we should give these guys a preview and Anna, right? A preview of where we are. So when do you think we could do that? Could we do that as early as next Monday?

--- *Dispatch* ---

SHAWN

19:52 I think that Anna and Jonathan are in our next meeting with innovate map.

MIKE

19:58 That's right. And that's tomorrow.

JONATHAN

20:00 Right. Okay. Perfect.

SHELLEY

20:03 I'm brief in the market where I've got a meeting with the marketing team, Jonathan. You're invited to that as well. You're welcome to step out if you're getting brief too many times.

--- Dispatch ends ---

SHELLEY

20:12 Just let me know if you don't need to be in that. That's just fine. I just wanna make sure you got it one way or another. So we're going through it with the marketing team on. I believe it's on Wednesday of this week. I think that would probably be a good rehearsal for going through it. If there is a need for anyone like, you know, Amy and Jed, that would kinda be a good rehearsal to help us know how to talk through and give us a chance to talk through at once and get that first round of feedback questions to help us improve for round too. So, yeah.

MIKE

20:48 Are we, are we then sure that what innovate map delivered today is final? So you're gonna caveat it then when you deliver it that it may be changed a little bit. All right. Do we need in this doc? That was the other thing I wanted to ask. Do we need to also add in here and so on? Probably mostly from you kind of what our closure process is on that, do we have that defined already?

SHAWN

21:22 When you say close your process?

MIKE

21:25 Getting it the final one approved by whoever has to approve it. Billy, obviously, you know, Brian, anyone else?

SHAWN

21:32 I'm gonna Chase that down. So the timeline of deliverables from them is in a notion projects that I don't have access to. So I'm getting access to that to review that. And then I'm gonna try and add our internal stuff into the onto that and say, okay, well, they're going to hand us something and then it's gonna go through a review process and that's gonna add so many days or weeks to it. So I'll Chase that down.

MIKE

21:58 Okay. So you'll do that? I'm gonna put that in here... and that will what we'll need a, I mean, well, can we pick a date that we're working toward for that?

SHAWN

22:18 Will put one in and share with you all as soon as I get that from them because I think our last, I think they're supposed to send their last deliverable to us on March 20 fourth?

SHELLEY

22:32 Fine.

SHAWN

22:33 I think so. And that seems given some of the other stuff I wanna do, it seems okay. So this.

MIKE

22:39 Initial then I thought that was more materials that was like finished materials.

SHAWN

22:47 Your time just for the corporate narrative. And yeah, let me Chase that down because we wanted to run it by a handful of customers. And I think that's gonna be the.

SHELLEY

23:00 That's gonna take time that's gonna take?

AMY

23:02 Add that.

MIKE

23:03 Stuff in here, Sean, yeah, I will. Okay. And should we also share this... with innovate map as well and make sure that we've got one project plan instead of two or three?

SHAWN

23:19 Sure. We can do that. I, you know, they, I don't know what's on their project. I haven't seen it, but we can probably combine.

MIKE

23:27 All right. We should probably find out from them. So we know what the timing is on all this stuff. So we can put it in here. So why don't maybe I'll reach out to lean on that and take the lead on trying to make sure we got everything we need in here. So we know when to.

JONATHAN

23:45 Liberals are coming.

SHELLEY

23:47 A suggestion on that? Yeah, could we have them lead the project? I mean, we're paying them a shit ton of money, let's have them lead the project up until the point that we end that term, that all their deliverables are complete, and then we have the

project from that starts from there. Are you worried about the overlap or gaps if we do?

MIKE

24:10 You mean managing this?

SHELLEY

24:12 No, just everything that's going on before they complete their delivery... not this.

MIKE

24:21 I'm confused. I'm not sure I understand what you mean.

SHELLEY

24:24 Sorry, I thought I was hearing that we wanted to have the process that's gonna go on with innovate map on this plan.

MIKE

24:33 Deliverable. So we know when they're delivering certain things.

SHELLEY

24:37 Okay.

SHAWN

24:38 Yeah. I think the biggest unknown right now is they have this deliverable timeline, but today, their deliverable timeline has been... based on us typically a single review of the people that are showing up to the meetings and not other folks that we want to get involved. And I wanna, I'll dig in with lean. I'll get on a separate call in terms of like, okay, let's see what the realistic timing for all of this is, what's actually going to happen because the way we're doing it is not getting the level of approval that we want internally. So.

SHELLEY

25:12 And I had asked for that time line last week seeing the same thing like, all right, we're just kind of getting into a bit of an echo chamber here. How are we going to expand that out? So, I think we all have the same question.

SHAWN

25:25 Let me Chase that down with her and see and I'll loop back with you all to see, you know what... if we think the levels of approval for each of those things feel good, but it does seem like one round with the tight group of folks that are involved, another round with the broader group, and then customers maybe.

JONATHAN

25:51 And depending on when we get the final... would we, would that inform our launch date or would we keep our launch date? But just kinda pair down what we're going to have done at launch date?

SHAWN

26:08 I think.

JONATHAN

26:09 That, that TBD?

SHAWN

26:11 I think this, the ladder. I don't think the launch date is gonna move because I think we're pretty like we are determined to have.

JONATHAN

26:18 Okay.

SHAWN

26:19 The bare minimum ready by qbr, we get before then, like we'll just have to make decisions.

JONATHAN

26:26 Yeah. Okay. Cool. Yeah, because I mean, as I was, so Mike and I talked and yeah, I had started going through the assets and that's probably the big thing I was thinking about. The training itself is probably going to be relatively straightforward. So we could definitely have that. I'm assuming it's going to be like a, you know, first call pitch deck, but it's just some of the older stuff that's gonna take more time. All right. So we'll just pick some priorities. Yeah.

MIKE

26:53 Would the general employee quote unquote training at the all hands be done by Brian or you Shawn?

SHAWN

27:00 I think that should be a Brian.

MIKE

27:03 Okay. So we'll tell him.

MIKE

27:12 All right. So, yeah. So I just put this in then get timeline of deliverables from innovate map that will inform the rest of this plan. And I think the rest of this, we can clean up like this. You already have this one, right? Shelly...

SHELLEY

27:29 I...

MIKE

27:30 I can delete that, right? New boilerplate you have correct?

SHELLEY

27:35 Do... wow, I also have a very aggressive crow. Can you hear it?

MIKE

27:41 Yeah. All right. So this is the sales stuff.

JONATHAN

27:45 I'll flush that out a little bit more.

MIKE

27:48 We, we, there's nothing in the product that's need to change, right? Or do we want to check with Jamie?

SHAWN

27:54 I know there's nothing that needs to change. I I'm confident in. All right, can...

MIKE

28:00 Later if you need to, any packaging changes as a result of not only the narrative but also the restructuring of the hierarchy?

SHAWN

28:12 Not because of the narrative. There are other packaging conversations that are being had, but I think it's a no for this project and there's a separate it's just a separate project going on there.

JONATHAN

28:22 Okay.

MIKE

28:23 That's a separate thing then. All right, there's going to be new sales slides. Yes. Let's get organized on that tomorrow then because they're gonna deliver some stuff and we wanna make sure we understand what they're going to deliver versus what others have to do. So, Jonathan, do you usually do the, you don't create sales slides, right? You're training on those or who creates sales lie?

JONATHAN

28:48 Usually...

SHAWN

28:49 So, I think Jonathan and team historically have, but that responsibility is shifting into product marketing. Would you do that? Jonathan?

JONATHAN

28:59 Yeah. I mean, it's a date. I've worked on them, but a lot of the source content. Was there. I just cleaned it up, standardized it, all right?

MIKE

29:08 So, we'll just do that.

JONATHAN

29:09 For now then. Yeah. But yeah, I mean, I'm happy to help facilitate updates, you know, kinda quarterback reviews and stuff like that. Okay?

MIKE

29:22 Yeah.

MIKE

29:30 Marketing team training... and Sean, you're doing this week or shall you said you were doing this, right?

SHELLEY

29:40 It'll be, I don't know what we haven't really talked about, how we're going to execute it.

JONATHAN

29:44 Yeah.

SHELLEY

29:45 It's scheduled to this week and I would call it a training. I would call it a briefing and then final training to come.

JONATHAN

29:54 Yeah. Yeah. Yeah.

SHELLEY

29:59 We're just getting a little bit of by and.

AMY

30:01 Yeah.

MIKE

30:02 All right. All right. I think we're in good enough shape for now with one minute to go. So key thing is to the assets, if we can get that Shawn when you talk to Leona and maybe follow up in my email and get something out to people know?

JONATHAN

30:17 What we're talking about?

SHAWN

30:19 Yeah, I'm gonna go ahead and just get, I'm just gonna take the because... they shared the summary of the work that we did at the end of last week. That's what I'm gonna go ahead and share with you, Jonathan, and Amy and Jed, so you can get preview of that, but I'll figure out timeline on the rest... cool.

MIKE

30:38 Make sense?

JONATHAN

30:38 Sounds good.

SHAWN

30:40 Thank you.

MIKE

30:40 All cool. All right. Thanks, you guys.

JONATHAN

30:42 Bye.

The End