Good morning. Good morning.

How are you? Hey, trish, how

are you? I'm good. How are you?

Good.

I'm not on video today. I'm not feeling 100% guys so sorry. To hear that.

Thanks for joining us.

And I got to nurse my way back to Healthy for next week.

I get it. I totally understand it. Well, on that note, Brian, meet tricia, tricia, meet Brian.

Hi,

Brian. Welcome, Hi, welcome.

Brian has worked with me on the Certologic side for What Are We at, Brian? Six years.

Seven.

My favorite video game.

That's a game.

I have like really quick hand twitches. I have like the fastest hand movement ever. Michael can never beat me at anything else to ask him. Billy, it's

our joke. That

was

a game in Holiday to take him down on. Every week. I

love that guy. Oh, wow. Remember

not to

challenge you to video games. I'd be on the opposite end of that

spectrum.

Lowest hit ever.

Raiden on that game.

That's awesome. That's awesome. Good morning. Well, I want to introduce you guys to another person. So here we have Marshall, Marshall, meet Kathleen.

How

are you? How are you, Marshall? Pleasure meeting virtually.

And

you so Marshall tricia is a friend of mine. Her and her husband and I coached our kids flag football a couple of years ago. We've stayed in touch. In kathleen is a fractional CMO. For technology, ball, Tech allies. Okay. So guys, just to get this ball rolling and really this conversation is mostly going to be kind of on the Brian Marshall communicating with trisha and kathleen side because I'm just kind of quarterbacking it. As a side note, caleb is at an event in Utah and will not be able to join. But Marshall. As he tag teams with caleb, will be able to handle his portion of it. So just to kind of introduce briefly who we have here. And tricia, I guess this is likely mostly for you, although kathleen, I know you don't know Marshall yet, either. So Brian. Leads a company called Smart Tech and Smart tech. Is a reseller of technology for small to medium size organizations. Kind of leveling the playing field with enterprise organizations. So today he is operating as our HubSpot connection. He's going to be bringing HubSpot to the table, implementing it for us. Kind of getting it all set up. He'll talk a little bit about what that looks like just from a high level. And then on the other side, we have Marshall. Who I know this is going to get kind of confusing, but it's the canoe way. So Marshall leads a company called Blue Ocean Studio. This is a startup that he and I are working, and Blue Ocean Studio Partners with funnel Flow. Funnel Flow is led by caleb So. Caleb leads funnel Flow, which is the Landing Page design creator and. He will be capable beheading the project of creating those landing pages within the hubspot platform. So all of the design kind of getting that stuff taken care of, getting it all set up. And then Blue Ocean comes to the table to do all of the content and creative. Excuse me, all the content, not the creative the content. And so all of the landing page content. The email content. And as kathleen calls, and I've adopted now the ticklers, the reminders. So Marshall has a little bit of a process in which he goes through not necessarily going through today, but he will discuss kind of the overall, like here's what I'd like to do, get on the calendar for us to get that stuff taken care of. And then I sit here and I make all the bald heads look very

pretty.

Because that's a back. Well, it's like a requirement. Do I have to get a new

haircut.

That in the beard. The beard used to be a requirement, but we decided to phase that out when Marshall came

in.

That's good. So all that to say welcome. And kathleen, I don't know if you want to give a quick kind of set up to the call or Trish if you want to, but I'll kind of shut up now.

Well, trisha, why don't you tell a little bit about the relationship between tech allies and technology balta. And then I can talk a little bit about how we're evolving. The marketing technology structure behind it.

Yeah, what we do as a companies. We bring together thought leaders. These are the hosts who in DFW. Cio cto csos, vpn above. Right. Throughout the year, in a season of in person networking events that we do, we're doing one in Austin and three in Dallas this year. And then we culminate the season with a gala in November, where we

do

raise dollars for Stem initia. Initiatives in addition to that. Layman's term, bringing together buyers and sellers of technology in a social set. Right. But we have why people come is because the executives love the peer to peer. And I'm so glad you're coming, Billy, so you can actually see it and feel it. I think it will help you guys, most definitely to convey what that messaging is. Right.

We do mentorship. So we have a mentorship today with ut Dallas. So we've mentored probably over the last nine years. And Technology Ball has been in existence for nine years, owned by a company named Karen bruno. Last year, her and I and another partner ventured and reimagined it to create instead of one time revenue that you get through sponsorships, recurring revenue, which obviously the same reason why you have smart tech. Right? No, that's exactly why you don't want to spend months at zero, ever. Right. So we did that last year. Now it's just myself. Who's the primary owner of it now Karen is working in kathleen. We have another lady that's in Austin that you guys will meet. Billy will meet that I was going to oversee our mentorship. So we have the mentorships with utt Dallas. And we're also this year we're expanding that with Houston tillerson in Austin, Texas, which is the oldest University in Austin that no one's heard of. And it's the most under champion because it's a historically Black University. So we are starting mentorships with them. So that's kind of the high level. If you have any questions, I'm happy to answer. We obviously have a goal to grow this across Texas and

other markets.

Not just in Texas, right? So that's.

Part of the requirement bringing canoe in is that the scaling part will really take marketing. Right. So right now. As Trish alluded to have nine years where the relationships and a really strong. Base in Dallas. So I think what we do there is a little bit different than what we'll do as we build out our marketing efforts to new cities. But we don't have to worry about those right now. Trisha alluded to the nine years old. But. They have been. Doing. Set up communications, follow up and all of that largely manually. They have a portal which we probably should set up. A call with Karen Probably, and introduce the relevant folks that need to understand about the Portal and how that will affect our world and how we use it or not use it or

whatever.

But the Portal today. Is basically their registration system. So they keep track of all the sponsors and the folks that are going to the various events and things like that. But the follow up, the communications side of that had been largely just through outlook. And. To go to other cities and to really reduce the manual efforts. Is. Our goal is to put in hubspot as the CRM behind trisha's used to using salesforce, but I've convinced her that hubspot is awesome and she'll love it.

I do.

And I think it's a lot easier. And then there's the integrated part that I don't have to sell you guys on. But the other part is that legacy website for Technology Ball is also I think I called it last time, Billy delicates. It is also a wordpress site that's nine years old. And so. Having the Integrated hubspot effort allows us to basically and the tech allies. Will ultimately become our sole place. I think. We can do pointers and repoint technology ball there so we kind of have to. Set our phased migration up, but the reason that we're kind of talking about landing page, whether it's actually a physically landing page that we select and call that. Use hubspot's landing page, or we just set up the first three pages of Tech Allies as our hubspot site, but we'll work through that. But the reason is that on the 20 eigth of June is that we kind of like to have our reveal party with their first event, which is one of the smaller events. But we really want to be talking about. Focusing on the core mission. This idea of expanding. And refreshing the brand. And again, a ten year old brand. This will allow us to modernize that I picked some colors. If you guys hate the colors, that's fine. You can tune them. You could do whatever you want because I didn't do anything that said these are web safe colors or stuff like that. But I'll present the colors to you after this. And then we'll figure out what that time frame is. But I think what we'll do phased is probably some sort of blend of the manual outreach and automation in the ticklers, because I know there's a whole bunch of those sort of things that we can. Take off their plates. But maybe not full automation. Right yet. Because again. We're also going to need to think about how do we evolve these processes and then look at them for future scale. So I think there's some really good opportunity for reimagining. And then other things like I've brought up is like the posters where ten years ago you'd go to the poster shop and they'll do featuring the sponsors is critical. The key executives in this. Go ahead, Trisha. I'm going to

just show it how bad the stuff

is. Guys. Okay.

Yeah.

There are no sacred cows. This is great. See, trisha and I have done. I don't know. We've probably done a half dozen projects together. And various companies and startups and fast paced environments. And so neither of us have any shyness around. Oh, no, we've always done it this way. Fortunately, we like innovating. We like martech. So I'm excited that. You guys are here to help with this process, so this

can be great.

I don't think you're sharing yet,

trisha. Okay.

Yeah.

There you go. This is an old one, but they all look

the same. There's the poster that I refer to. Yeah. So that's why I kind of chuckled so literally. I was like paying. Heroda Printing. They charged me ridiculous hours to add three people to this thing like this is not repeatable. Do you know what I'm

saying

at all?

But. We add executives throughout the season. So two of the things we showcase. That our actual seizing is we'll have a poster for the sponsors, and we'll have a poster for the executive host because.

Sponsors Executive Coast Today there's like things like Canva where it would take 2 seconds to put the next person on there and shoot it off to the high res version that's print ready

with the we did. We just did a poster for my son's concert. And if I could show it to you, it would. It turned out beautiful and. It went right to

staples.

And you can just write the same day. Two days later, pick it up at staples. And it was fantastic. And it was an amazing print. And they just.

Great. Yeah. So there's so many different things that we can do now that. Will automate and streamline. If that's $500 every time they touch that, then. That's essentially money that we don't have to pour back into and take. Out of the goals and the missions and stuff like that one of the questions I have that was kind of one of my objectives today was just. What's our sharing platform? How do you guys keep yourselves organized? Obviously, you must have a way to do that. Does it click up or trello or whatever?

Sure. So we use a combination of slack and Monday. So we will create a project for you guys. Once we get organized on our back end, we'll be getting the combined agreements out here shortly for you guys, but, yeah, we'll be getting you access to a project on Monday. And then we'll create an external slack channel for everybody to communicate

on. Okay. Yeah. Because. Things like trisha gave me the link to the last year's Gala Images, right? A Photo Gallery. And all of that is just going to be a huge part of what we want to do with the showcase of the executive sponsors, key executives and the sponsors. But then who takes those? And where do you keep those and all that good stuff? So I figure we'll get all that because. What I have done at this point is sort of knowing we were moving toward this is I've held off doing anything and setting up any structure. On our psychiatric just dropped that link. In there in the chat.

We'll get them from our photographer. Okay. And we get them after every event. Several days later, it's on us to figure out we deal with them, pick up few, and either put that down a social path,

right.

But

Yeah.

I think that was the 2020 events. Has all of them. I think it was but there was a Gayle and two in there.

Okay, that sounds good.

But there's a way for us to streamline information or integrate things we'd, like, prefer that right. If possible.

Yeah. We'll create a Monday board for that.

Cool. Okay. I don't know, Monday, but I've used the other things, so

it's fine. Yeah. Once, you know, one, you know, basically all of them for the most part. And we have some training, docs, if you care to take a look at them. So. Yeah, I think obviously a big foundation of this is going to be getting hubspot set up without hubspot. The rest of it's not really going to be

there. That's like immediate. Yeah. Trisha's got we want to set up. We've got some formatting as far as the contacts Trishanise Bill has set up her deals in there so she can start tracking the financial side of it and then all the rest of it for the cms.

Yes. And that's where brian's going to come into play to get that taken care of through implementation. Brian, I don't know if you have anything off the top of your head. Either a questions or B kind of just next steps. But do you have anything?

Yeah, of course.

You know it cool. Let's go ahead. Let's jump right on. I'm not going to come unprepared.

Come on, now. A wooden anticipated.

Yeah. So the real the real basic. Step one right is getting HubSpot set up and going. We've talked to our reps over there and for what you have going on. You have the option of going with a starter package, which. Has 1000 marketing contacts that are included. How this works typically is you have marketing contacts or somewhat what I would consider an mql or a marketing qualified lead. You can technically have like 10,000 contacts in your hubspot, but you have up to 1000 that you can have at this price, that you can send automated emails to. If you have 10,000 in there, you can use things like Sales seque. Sequences to do a more one to one reach out. So if you had, like a really big list that you bought like Billy just bought a list like 13,000 contacts. We can upload that into hubspot, and you can use sequences of contact, but it wouldn't be considered an mql yet, so it wouldn't go against your marketing qualified leads, which means they wouldn't work within your automation. Real small thing, but important for you to know it is. And I think right now.

What is it? I think there's. Around 400 that we'd call our current mqls the

active

people in there. That's right. That's what you were talking about. That list,

trisha,

right? Because there's the older stuff. But when we really willed it down, it looked like the fresh current active guys are about 400. So we're in good shape for now.

Perfect? Yeah? And that'll make sense? Yeah.

As we get lists and build that up for like Austin, we'll be okay probably through the first 18 months or so, and then by then we'll have enough revenue coming in, so it won't be a problem to scale that past 1000.

Perfect. Yeah. And there is a free CRM you can have spot. But honestly, the limitations that you get upon, what kind of tools you can do, what kind of market automation you can do. It really hampers your ability to really do much with the system. So the closest package that I found that makes sense for getting your feet wet is like a $30 a month crm suite. It's basically considered their starter package. And you can see if you buy the starter individually. They're like $20 for the marketing side, $20 for the sales side, service side, and the crm hub. So. Kind of the cms part of your website hub. So depending on what you guys need, it starts out at around $30. You get these kind of bundle in for the one price versus the $20 each. Now, if you end up needing more with the website. You can upgrade to a professional for the cms, which allows you to build out the website and it makes it to where the website doesn't have hubspot branding on it, so it does give you the ability to expand that and make it a little better. It is one thing that I recommend. Start out with cms Hub. Get a feel for how to build out the hubspot branding isn't super aggressive, so I think the difference is pretty large for what you get. So I think starting out with just the crm Suite gives us a good baseline. What's included or

what's happening with the details here. Do you have questions, Tricia

this

all

meets. Hubspot Brand. What does that mean.

Yeah, let me see if I can pull up a version of my site. Before. I think it's because they now offer that. In this package, which they didn't before. It's like when you get an email from mailchimp and this is brought to you by mailchimp.

It's not like big on the top or anything.

Let me pull up my website. I'm in the middle of rebuilding it. So the home page has been a little finicky at the moment, but let me give you an example. So I just rebuilt this on hubspot. And you can see it says, built on hubspot in the lower corner

here. I don't see that anymore. Unless

you Yeah. At the very, very

bottom

left. Bottom left.

Keep scrolling.

It isn't really a scrolling thing. It's really in the bottom of the screen.

Okay. It must be your size of your screen. Maybe turn a laptop. Maybe it only cuts off certain parts. So yeah, even there, you can't even really see it. Right. So that tells you exactly. What it is as far as what you see. Okay. Perfect. Thank you.

Yeah. I just uploaded it to the Chat, a screenshot so you guys could actually see what it looks like in the bottom

corner there. Yeah, that's good,

Billy. Okay. Oh, that's perfect. Yeah. Thank you.

Yeah. And then you can have, like, a link to your blog. So I have my smart marketing blog, which I'm doing some new content for. Ga four around so you can do a basic website. And this is the I have the starter package. For Smart tech when it comes to.

The website side of it. I have pro for other services, but I don't have pro for the cms because I don't need it. It's a small website, but that gives you an idea as far as what that looks like.

Okay. And you can mix and match it. That's good, too.

That's good to know. Yeah. So if you like Marketing Hub, for example. Gets you a lot more automation. It gets you a lot more like Marketing Hub has 2000 contacts to start with. For example. And so if you wanted to get like Marketing Hub with Professional and then Sales Starter, you can mix and match kind of what you're looking at in the future. And the nice thing is once you start with Starter, I can work with our Sales, our csm over at hubspot and get you a discounted rate on the upgraded versions. I know when I started out. With hubspot Professional and Sales Hub Professional. It was like $13 a month. Quoted here. I was able to get it for, like 800. Depending on what you're looking at, you can get a pretty good deal if we go through. The partner reps and get kind of some negotiations in they always want to try to upsell you from Starter to a professional model because that's how they make their money. It's kind of a freemium setup, but honestly, I don't think we need to worry about too much right now. I mean, starting out with the Starter bundle and then maybe adding more website features in the future would probably be a good first step. The other thing I should mention. Is that you can upgrade. If you end up getting a lot of marketing contacts, you can make this a 3000. Contact. Really high quality contacts that you're reaching out to every month, and it only brings to 130. I could basically

buy features. That correct. Yeah. It ends up being.

Like a dollar per contact or even less when you bring it in.

Okay.

As far as the process just for clarity on this. With your email and your login, what do you use for email? Is it Tech Allies currently or is it technology ball? Because I have you register a technology ball in the

system. It's technology ball

that we'll

want to. Do is have too much change. We had a lot of change last year at a partner exit. So the technology ball has a lot of. Familiarity and comfort. And we rebranded last year. Just want to make sure we do this in a way that doesn't still feel like right. So things that we're reroute would be better for us for this first year, I think or halfway through, potentially. I don't know.

Got you. Yeah. For me, it's not necessarily as much on the branding side. It's more in line with. My relationship with hubspot. I have you guys registered. As a with my partner up so that when you guys sign up. Our team kind of gets the deal. This keeps you from being hounded by the salespeople that are going to be naturally following up with the starter packages. Right. So we basically assume the deal because we're the ones who are working as a reseller. So us and our partner rep would be following up with you and helping you understand and onboarding and all that kind of stuff. One that gives us credit. But two, it keeps you guys from getting hounded by the salespeople. So when you sign up the easiest way to do this, honestly. I don't need to go and get you an agreement or anything for hubspot because it's starting on the sales package. I can send you this link and send you the bundle kind of function. You can literally buy it online like an ecommerce transaction as long as you use. A technology ball domain in your email. When you sign up, it'll be recognized as our account and it'll save you all the hassle and it'll go into our follow up pool as far as our service

line. So I had one question, so I see it comes with two sales hub. Kathleen, this may be the question for you. I don't think we'll have money more than that. I don't believe. But I'm thinking like we could use a free one for larissa. There's no reason to pay for her one, since she's just managing our mentorship program. And not really using any of these marketing functions.

Yes. So sales hub, you would have access to things like the Deal program. You'd have access to sales sequences. So if you're going to be an active salesperson in the account, then we would have you registered. As a

salesperson,

essentially as Trisha as a sales hub. Right. But if you're just a youth, pardon me, a user inside of hubspot and you want access to the contacts. And you need to see oversight. There's no reason to have you opted into the sales version. Can you make notes on the account? Like a good example. Larissa reached out to me. I made notes of all the conversations out of people I'm like, Well, that's brilliant. So I've asked people, do you have children? Like, yeah, twice. You have kids. It's like, Shit, it's not too many people. We all need a way to have that global view of the data as a community.

Yeah. That's how I've got aquaspy set up, trisha. Is that basically I've got like the head of Sales and me. We're like sales leads. So we do all the deal making and all that. But I've got six sales reps, and they're all on free CRM seats. And we send each other notes and assign tasks and do all of that stuff within that. So that's really nice flexibility.

Yeah. And you can see the notes section here. You can come in. You can create. A note in the system. You can create a follow up task force someone in the time frame, you can add different personalizations. So if you're associating this with a deal with a company. With a ticket, right. You have a bunch of different options for that. The nice thing on this, too, is you do have a couple of really cool functions. So one you do get the ability to do the notes and. The email functionalities. But then on the deal side, this is where you can actually add a new deal. So if this is a deal that we're working on, right. And this is a potential, it's a new business, right. You can say the possibility or the priority on this is going to be high. It associates that deal with the contact it associates with the company record. So if I know that this is going to be. Tech knowledgeable. They may not have it in here, so I may need to actually go in and add your guys'company, which is fine, but you can actually enter like an amount. So let's say this is a $30 amount. When you get into. The deal workings, it'll actually assign a probability based on deal stage. So if you know that you've already scheduled an appointment, right. So presentation scheduled is a higher propensity to buy. Than qualified to buy. This is like a situation where we are at contract cent or whatever it might be. It helps your probability value. So if you know your overall deal of $13,000. Your probability of that goes up to 50%. If it's a contract sent, or if it's a decision maker bought in or whatever

that might be. It's all built in.

Yeah. Okay. Germaine, can you customize it at all or not?

Oh, yeah, you can definitely customize it. So like, for example, on my situation, I have free trials that my clients go through when we sign them up for our reporting dashboard. So Tap clicks offers a 14 day free trial. So I have to put a deal stage that is free trial started. Free trial ended. I have different customizations. I can do with that. There's also different preferences. So if you look down here. Under data management. So contacts you can edit your contact properties. You can customize the contact properties. Really be whatever you need again for me, I have a lot of really custom ones in here that are, for example, free trial. So I have free trial status is free trial. And these are things where you can have it be like a drop down. Na in progress requested an extension free trial expired. Right. And the cool thing about this is I can actually set up. Lead scoring. So that when someone makes it into my free trial process, they get assigned, like, 50 points of lead scoring. But if they expire, that 50 points goes down to 30 points because I deduct points from them. Right. And so it gives you the ability to really kind of understand. That lead score. So let me show you some lead scoring as an example, because I think it's one of

the coolest features. Brian and I are fan. Oh,

yeah, it's a big deal because. You can see like if I'm having a salesperson follow up with certain people, right. I have unqualified. I have a rule that automatically marks anybody who unqualified as. A 50 point deduction. Right. So you can see that this is the last person I want to have my salesperson call, even though it was a free trial. But this Alice SEC person she said, is a free trial right now. She came in today. It set as free trials in progress. So I have a workflow that is now going out because of this specific custom field that I created, and then it updates the hubspot score by 50 points because that person has opted in to a free trial and because of that now my automation can go in so that person can get on my free trial workflow. And now you. Can get a very clear picture if the free trial is in progress and it's been created after a certain date, assign it to my contact owner. Send a day one email. And then create a task to do a follow up on LinkedIn three days later. Contact. In this action. It says delay for three days. Then send another email. Delay for two days. Reach out by phone delay for another two days. Reach out by email here and you can see the sequence goes, the entire free trial plus. Sometime up to like day 30 when I'm trying to get that person to engage. So the really handy thing here is you can set this up, you can set a goal for what you are trying to accomplish with the free trial, which is basically conversations, contacts, met, goal. And you can really kind of set up a lot of different workflows depending on what you're trying to accomplish. If you're doing an email campaign and you want to make sure that all those people are in an email campaign are following through, you can set up workflows with that as well. So really just a ton of really cool information that you can do in here to make sure that your access and that what you're doing is really more automated so that you're. Getting more bang for your buck as far as your time.

Cool. I like that. That's a lot more in the Salesforce I've ever seen to do as far as around that.

Yeah.

It's really kind of pretty slick. It just connects with HubSpot. And HubSpot is used for prospecting, nurturing market automation, whereas Salesforce is used for deal management. That's typically where a lot of the enterprise level B to B clients that we work with ten $50 million companies. They use Salesforce HubSpot

in tandem.

Got you?

Yeah, a lot of mine, too. They're my bigger clients, too.

And I will say hubspot is 20 times cheaper than marketo or pardot, which are salesforces market automation

systems. And I would rather not ever deal with part

ever in my life. Thank you. That was like the worst product ever when it was integrated within

Salesforce.

Yeah, it's kind of ironic because it's a built in product,

right? Yeah,

it's just funny. Anyway, I will send you the link for the Salesforce bundle. That way you can get a really clear picture again. Anything that's starter package related, you guys need to sign up right there. I've already had your email. I already have your email registered, so you should be fine when it comes to that kind of situation. And then after we get everything started, obviously, we'll go into more of the situation where we are helping you build out your market automation, import your contacts. Working with caleb and marshall's team on content creation for email flows and all those kind of great things.

Okay, so this is our next step. Our first next step is tricia gets in there and buys that bundle on her

fancy.

Fancy new credit card.

Cool. And then next up, we got Marshall. And as a reminder, Marshall is obviously creating all the content for the site. That caleb will be building, plus the emails. Obviously, most of his process is going to be done in follow up meetings. But, Marshall, if you don't mind just taking a few minutes and kind of talking about a little bit about your process, how you ask the right questions. And what to expect next

before you get. I just had one quick question. So I have the Allies credit card. I don't have the Tech Allies credit card yet. Hasn't came in yet. Can I start with the one and then switch it over.

Yeah. You should be able to just update the credit card in there. Yeah, I just did because it was expired.

Got to get those air miles. Come

on. I know.

Where are you based? Marshall? That was my

other question. I'm in Bend,

Oregon. Okay, so you're more on my Time's done. Okay. I'm in

California, okay. We're at in California.

San

Diego. Okay.

I'm in Las Vegas, just for your knowledge, because you weren't on the initial call where I had revealed my knowledge, my

location.

You gamble. I'm guessing not right. I don't gamble. Which is why I can live here. We've lived here now for almost three years.

And I have not put a single dollar into a slot

machine.

Good.

Shows I personally cannot live in Vegas. So when I do visit Brian, I tend to stay at the hotels and he comes down to me.

That's true? Yeah, I'm a musician if you can't tell from my studio behind me. When I'm not flinging marketing, I'm slinging beats. And so I do a lot of different shows. I play drums, guitar, piano, production. I make music. Whenever I can usually. So Vegas has been a great market for performing live and

getting out doing shows.

What kind of music is your

passion. Believe it or not, I'm more of a metalhead. I'm a pretty heavy heavy metal fan, but I'm a classically trained jazz drummer. And I played for a pop band that's similar to like ANI de Franco. Meets Jack Johnson, my singer songwriter that I was working with for ten years. We put out a lot of good music up in Portland, and she was very much like a feminist pride. Any DeFranco singer songwriter kind of lady. And it was heavy pop influences. So I was a pop drummer for ten years in that. But my writing style is pretty eclectic, as Billy Can attest to. I've sent him like ambient tracks to work to I've sent him

heavy, heavy drop metal beats with like double bass out the wazoo.

I've sent him pop tracks. It's really quite the eclectic variant of

music. Tricia, you didn't know you were getting entertainment along in this bundle.

Well. Have you played it in Austin, where Billy and I live? Or

we say I've not played out in Austin. No, I don't know that my metal band would work for one of your

events.

But I could probably fill in on a jazz

trio. Hey, you know what, though. We need music at our event. In the past, she's done djs, but lately it's been pretty sleepy. We're going to jazz it up this year for sure. So we'll get back to you.

There we

go. Right.

That's good. All right, let's jump into it. Marshall. It's all you big man. All right, well, thanks for the opportunity to be with you guys. So my portion of this is going to be gathering data. So after we'll have a follow up call, I'm going to ask probably four or five questions. They're going to be based upon kind of things. What you do. What you bring to your market. What you're passionate about, all of those things are going to help me build the copy. I'm going to be creating your tone, your emotion and voice for all of your copy. I'll be creating whatever copy we need potentially will create two landing pages so we can do an AB. I don't know if we're going to be wanting to do an AB on this comparison, but we'll create

the

content. Bring it all there. Of course everything will go across your desk. And I'll be working with caleb. Caleb, probably more interfacing with that part and meeting with you to talk about what you like, what you dislike, about the copy, and then. We will retweak it to get it going. We have to move pretty quickly, obviously because. We've got a June deadline so I will be reaching out. Probably just send it in a document with the question and have you write it. It's really easy for you to write. And what I just expect is you don't need to. Put any sentence structure in that. You don't need to put periods or commas unless that's what you do. I just need the content, the basic flow of it. And then I use that to build all of our content. And go from there so. That's my process. Very simple. I'm not complicated in that.

Do you mind if I ask a question? I'm setting this up, guys, just quickly. We're on the phone. I want to make sure. The company name I'm using under the company address. Am I using technology ball am I using the legal entity.

That's Brian.

Inside a hubspot.

Yeah. I'm trying to do the checkout to sign up for hubspot. I put in my email checkfall to make sure you guys get credit. But it's asking for the company name. The company name is an LLC. It's not techball. I just want to make sure I put that's fine. Yeah. How we get associated is based on the domain, actually. Okay. Perfect.

Eligible domain is that we get the credit for.

Okay. Perfect. Thank you.

So a couple more things to back on to Marshall for a second. So Marshall also. And this is not to go too far back behind the scenes. But Marshall has a very. Heavy background in business management. Schooling, business, philosophy, organizational, all that kind of good stuff which is partly. Why being able to create content works for him is he understands the gig. So with that he also. Will be kind of working behind the scenes with me as we do what I introduced to you guys called the twelve Month Strategic Revenue map. And basically this is an entire document that's pretty robust. Trish, I think you'll appreciate this because of where you're at and where you're headed. But it basically outlines the next twelve months of everything we should be doing throughout the entire business. And this is from marketing and sales to even operations in some place. Organizational structure, et cetera. Branding all that kind of good stuff. So Marshall participates heavily with me on the blue ocean side as well. With that. Because we have the June 20 eigth. Obviously brian's kind of off and running Trish as you're setting that up.

But it's done.

Even better, awesome. When are we hoping to have everything live so that we can start to drive traffic to this because it's not going to be June 28, I'm guessing.

Kathleen, I'm going to let you answer

that. Well. I think that. I don't know, that. We have an urgent need to drive traffic to it for June 28, particularly because. Correct me if I'm wrong Trisha I think that's still an invite. Only event. And so we don't have to send anybody there per se. It's more that. We want to have people be able to check. And just know and see this. So I'm actually probably more interested in having the social media aspects of it. So we refresh our LinkedIn company page and that we take the brand elements from. The initial website page or landing page. Whatever you're talking about, that we basically have a mini reveal for the branding effort. And that could be I don't care if that goes live June 26, honestly.

The pin on the date is that for that event, we won't be able to say, okay, people, we're unleashing this. And this is where we're going for our season this

year. My question for you then. The drip basically or the tickler someone uses getting things done gtd System It sounds like when you're using ticklers. So are you talking those being for this event like

we're engaged. I don't think we have to, right, tricia, you're pretty much you've got what a couple of dozen people that you've already basically reached out to and are connecting with one on one. Right. So there's no ticklers on those. And you've already got your process for rsvp set up and. Everything.

Yeah. So what typically do is we'll have Karenson, not an applicant. Right. To the executives. And only the executives are on that. We don't cross pollinate that with sponsors because a lot of the executives give us their personal emails. That's the other thing I'd say over 50% give us personal emails, right? Because they change jobs.

What we typically do there is. I'll create a secondary email that just has just the sponsors on it like Billy the one you're on, but I'm happy at the end of the bill if you have a second to share with you because you asked me who is attending so I can show you that how we track it

in Outlook and the sponsors is probably more the subsection. That will do the ticklers and stuff on. Right. Because we'll automate that and keep those two groups

separate. Yeah. So we'll want to keep gaining more sponsors. Right. We need more sponsors for the year. So we'll have sponsors who want to send stuff to that. I think that. But I don't think there's any you write hard deadline that it has to be done by that. Yeah. Not that old branding and not that old shitty website. Right. And so really, I guess the mission of this then if the goal is to sign up more sponsors is to basically

have then become a sponsor. Here's our sponsor kits. We have that little. We have a little chart. So maybe the call to action and that landing page is become a

sponsor.

That makes sense.

Yeah. On LinkedIn candidly a lot for sure. As I said, it's a social. We can email them, but the likelihood of that is not as great.

So you use the word, I believe application for the executives. So do you have kind of like a questioner you go through with them.

With the executives.

No.

Yeah. Last year, we implemented a survey where they were giving us their budgets and things. But we had other business partners I share with you that treated them. As a sales prospect and did a lot of damage that way. Like you have to buy for me. So we've got to have a much softer approach this year than last year. But we can work where we were at now we are meeting with our executive, the Nasty for recommendations on sponsors. But we haven't redone a survey this year like they did last year. And a lot of about 35, 40% gave us their budgets. It was shocking.

But on the sponsor side, an application with some initial information would be handy.

Correct.

So in the near future, maybe in future projects or as this has grown in scaling, I think that's an area that we can help you a lot too in more of that. Data capture, lead capture, information capture. There's a lot of ways that we can do. Fun.

Questionnaires and that type of stuff. There's fun ways to do it. Where. You guys are familiar with type form. I would assume it's pretty easy to create questionnaires, but they also in a company called Video Ask. And so you can actually record yourself asking questions. And then the user records themselves answering the questions, and they're given certain periods of time, and then it creates a reel. Yeah. It's actually

I do type from I haven't seen that one. That's cool.

Yeah. And then I believe we're going to be using it on the canoe side. We're starting a mastermind collab, and that's going to be part of the process. Is a video Ask series. So anyways all that to say future once we're there that'll be good to kind of get there. But for now. I just confirmed with caleb for the work that Marshall and caleb are going to be focused on. I would say in general, we've got. About. I'm not being conservative on this. So I'm really going to hold them to the fire, but about a two week turnaround. So let's call Monday as day one of two week rather than right now. So probably right at the start of June. I think we could maybe. June 2, right in that zone. I think we can actually have some good stuff utilizing. Within the audiences. So all that to say we'll have some follow up steps early next week. Brian will have some follow up steps as well for implementation. And I'll get these agreements out to you guys. Here. Definitely by tomorrow, but my day is kind of packed. I'm trying to get it in, but we'll get going on it for sure. So anybody have any final thoughts? Questions, missing pieces? Do we feel as though we have a good hold on what we're doing.

I think this sounds awesome. Yeah, same here.

I'm excited for this project.

After you go to the Attend next week, you may come back and say, Hey. We may need to think our strategy, right?

Oh, Yeah. And. I was actually thinking if it's possible of having either Marshall, Brian, or caleb, join me. If any one of them are available just to get a second set of eyes. But if that's going to be too much for you guys, I also understand that. But I have a feeling that this could be. A pretty big thing for you guys. Done appropriately and scaled right. What's the date.

Once we get a firm count, hopefully by the end of the week. Honestly, right now. We have. 32. Maybe you guys can teach me something about I'm going to share my screen with you for a second. Sure, just because it may help. So when I look on my iphone, it's a lot cleaner, because it gives me all of the ones that are accepted. But for some reason. On my outlook here. It doesn't. But I know you said, which companies, right. We have Toyota. Trying to go down here? Is there an easier way? See here's a gmail. So who knows.

So there's only three columns here. Name, Attendance and response.

Yeah. Okay, so this is how she sends the emails out. I'm not kidding. This does that to every executive. And then. I'm not the owner of it, right? But when I look on my iphone, I can see all the acceptance are all branched together. I don't know why they're not like this.

Right. Yeah. Be completely honest with you. Outlook has never been a friend of mine. So I have

no idea.

But yeah,

I had a trick. Ntt data. So it's the CIO of NTT data. A lot of them are real big customers, right. Everything in between. Let's see what this one says.

What you're saying?

Oh, weird. That's the car dealership, I'm sure concentra. Let's see. But there's 32 on my iphone. Let me take a picture of my iphone. This is crazy on my iphone. It groups them together. So how come I won't do it on my outlook? An outlook makes no damn sense. Like the most ridiculous thing.

This is a struct. These are the things that they need. Better.

I have a feeling in a couple of months, you guys are going to be like, what were we ever

thinking? Yes, I do. I think so you guys can make them. This topic of the client list. So once the HubSpot stuff is basically created on the ecommerce

side, what I would need to start getting your people in there is just an excel Doc that has the company the email. The contact name, kind of the basic details you would want for anybody to follow up. How hubspot looks at it is based on domain. And email as their unique ID. That's the unique identifier. So as long as we have those good basics and obviously a first name, last name. We can upload that into the system. And then if there are certain information points that you want us to map as custom fields, what we can do is we can take those fields and then create a custom property inside of hubspot. And then when we map the contact in, we can map it to that field. So. If you want to say attended event. Yes. No. Maybe we can have that be a custom field that we import in as like, one big, large import, and we can kind of prep the system for that ahead of time.

Yeah. We definitely need that. And then some of the customer types. Or relationship types which is like. The executive sponsor. Key executive. Those kind of things.

We'll need a little bit of thinking on that. If that email is already associated with a contact and hubspot, I can upload like that list with a new column that says. Von Horn Event

response.

Right. Once I'm mapped, and then I can import that lead in, and I can say, okay. Well, the email is already known, but add this new information

to

that. So it's a really nice way of just continuing that update. So maybe you have a response that's a Van Horn event. Maybe you have a sponsor, that's a Microsoft event. Maybe you have a response date from a Van lewin event. Whatever it might be. Right.

Okay.

Cool. Yeah. We definitely need to track all those events in there, so that's a good point.

All right. So here's. What. You'll get some email communications from me by the end of the week we'll get some schedules set up for next week to get some data and work started. And then we will be off and running. We'll also get the Monday set up and the slack set up. So to both caleb and I's. Grain recorder. Please add those as tests.

Awesome. I am kind of out of the pocket a little bit. Monday. I've got to go up and do a panel session. It's like hours away here in Riverside. But I pretty much end the rest of the week.

And Tuesday. I'll be in Dallas with Trish. And that'll be good. So outside of that we should be available.

Awesome.

Cool, guys. I appreciate it. Thank you.

Thank you. Good talking to you. Good to hear. Good

meeting you.

Marshall. Take care to this. Take care. Thank you.

Bye,

guys. Thank

you.
you?
Kathleen G
Tricia Shevlin
Kathleen G
Tricia Shevlin
Kathleen G
Billy Mitchell
Kathleen G