

Text message
10/15/22, 2:30 PM

Steve here. SureBright. Saving your number and here is mine

Hi Steve, perfect. I'll save yours too. I got your email, I'll work on the points you told me & make sure to have it ready by next week.

Awesome. Enjoy the weekend

Thanks 🙏 you too!

10/15/22, 4:41 PM

Reading the FAQs you sent.

Are "FinTech" and "NeoBanks" the same thing? Are there FinTech prospects that aren't NeoBanks?

BNPL also falls under "FinTech" correct?

Correct, BNPL falls under Fintech. I think what they meant by Fintech there are the merchant aggregators (Google pay, Paypal, stripe...). NeoBanks are the banks that operate exclusively online like Wise, Mercury..

Ok thank you that helps

You're welcome!

10/18/22, 11:32 AM

I moved our call to 11:30am so not sure if now is still a good time for you. I just hopped on

Coming

10/18/22, 4:23 PM

Manish said to get those two books which I believe you did and he will expense them

No problem. Thank you!

11/3/22, 8:46 AM

Good morning! Do we have the seamless AI licenses yet?

He told me he'll send you an invite too

The seamless guy?

Sorry my second text should've been sent first.. signal issue

Good morning Steve, yes Manish got it, he sent me an invite yesterday evening, I'm signing up right now

Ok well I guess i would want the license appointed to my future steve@SureBright email not my personal gmail but I just want to get in and play with the data

I hear offer letter coming mid next week

And then I can onboard

Great news!

11/8/22, 6:33 PM

What's your experience so far with seamlessAI ?

11/8/22, 9:37 PM

I've narrowed a crm to pipedrive and hubspot

Hubspot...They have an 80% discount for startups

11/9/22, 6:36 AM

They're good in terms of data accuracy, but we will only use it to its full potential when it's connected to a crm where we can automate operations. PipeDrive & Hubspot are both good. Also Kai told me that they have one year for free for a CRM called FreshSales, I never used it before. Are you familiar with it?

11/9/22, 8:03 AM

No. Not familiar. Please look into it and check the integration and automation capabilities

I'll check it today and get back to you

11/10/22, 4:27 PM

So I checked FreshSales and it's possible to integrate with seamless, but Manish told me that it's free for the 1st year but at the renewal next year it'll be very expensive. So our best solutions at the moment are HubSpot & PipeDrive

I agree and I don't want to be distracted with a crm re-analysis and change over in a year.

Please investigate both options. Those are the ones I've narrowed down to as well and I am doing the same

Sure, I'll try the free trial on both of them & let you know

Ok. If you schedule a demo or anything I'd like to join

Would be good to do

Perfect 👍

We need good prospect lists.. the one that I have is raw data and most of them aren't qualified. We'll brainstorm in our next call

11/16/22, 4:39 PM

Hey bud...Friday will be a good time for you and I to have a 1/1.

I've learned a lot in a few days...I can also sense frustrations across the team - all normal, and nothing has scared me away. In fact the opposite. I see tremendous promise and am being asked to take ownership of some things that should be cleaner here. What needs attention is clear to me now.

I also want you to know how big of a role I see for you here. And those that matter agree. I've got your back there.

This call appears it will linger a bit longer

Glad to hear that. Much appreciated:)

11/17/22, 5:16 PM

I won't be able to pick up. Hope the call goes well I will talk to you tomorrow I'd like to set up a brief 1:1. Let me know best time for you

Think about the "magic wand" question ...I want to know how I maximize your production and efficiency

Talk tomorrow :)

3/29/23, 3:22 PM

*Attachment stored in iCloud:
voicemail-676.m4a (Audio)*

7/21/23, 8:49 AM

Hi Zak, I'm curious how you are doing. Hope all is well at SureBright. Let me know if catching up is of interest

Hey Steve, long time no talk, glad you reached out. Doing well, how about you?

Doing well. Spent some time consulting and just accepted a new role and my wife and i (and dog child) are moving to St Petersburg, Florida

Will miss philly but we are keeping our place here and renting it on Airbnb so we can still use it

But we will be Floridians. Never would have guessed this would happen haha. Cheers to no state / local taxes tho!

Congrats on the new role!! Florida is so much fun I heard. You'll be able to visit Salvador Dali museum I think it's in St Petersburg

7/21/23, 11:29 AM

Big fan. Huge collection there. So much good history

How is SureBright doing. Hoping nothing but good things

And how are you doing there?

7/21/23, 1:49 PM

We had some ups & downs, you know the startup life lol

Well I'm cheering for you. You had popped into my mind and always had high respect for you so wishing you and SureBright massive things. Keep in touch

Thank you brother! You as well. Definitely keep in touch 🙏

10/13/23, 2:54 PM

Hey Steve, Hope you've been well and that Florida is treating you great.

I'm interviewing for some new jobs and may need a reference for Surebright. I was wondering (if needed) if I can list you as my reference for that specific role. Totally understand if that's not possible - no obligation at all! Regardless, I appreciate you and wanted to say hello. Look forward to catching up more soon!

I'm in

Anything you need

Thank you very much Steve! Much appreciated

10/19/23, 9:52 AM

Morning Steve, a headhunter with the name of Tori might give you a call today for a reference. Thank you in advance :)

10/19/23, 11:22 AM

Hi I just got a voicemail and can call them back in about 4 hours is that okay?

Absolutely! Thank you 👍

10/19/23, 2:33 PM

They called, I called back, just left her a voicemail

Will keep you posted

Appreciate it

Just talked to her. Gave you the best reference. I hope it helps

Thank you Steve. That would certainly help. You can count on me for any assistance you may need in the future

I appreciate that and appreciated you. One of the best I've seen. Go crush it now

And let me know when you get/take the offer. Curious what it is

I'll let you know once I have it 🙌🙌

10/23/23, 12:46 PM

http://mm.fongo.com/MediaDisplay.aspx?mediaToken=aIEDjleR-1vdt3KBV8eL6XGxzxBlz9DIMzuCbDuR_YvX1bFvyofzkpvW26h3Xn5V

Hey Steve. Let me know what you think 👍

Is this spam ?

Lol no the link is a screenshot of the offer

I can send it through Whatsapp if you have it?

Haha ok can never be too sure

I sent it through LinkedIn

You got it!!!!

Nice gig man

You will triple that

Thank you 🙏

Hopefully 🤞

You should be proud. Celebrate with the wife

I am doing that as we speak!

Yes sir 🙌 we'll celebrate it today for sure:)