

iMessage  
4/18/23, 4:28 PM

CMO to CRO: The Revenue Takeover by the Next Generation Executive

Read 4/18/23

<https://a.co/d/bOIInkaZ>

Jim,  
Great conversation. Appreciate your time today.

Your comment about needing a CMO reminded me of the above book, 'CMO to CRO'....I found it to be helpful as it applies to standing up the building blocks for early-stage revenue and marketing.

Looking forward chatting next and anything you can share in the meantime.

*Attachment stored in iCloud:  
PNG image.jpeg (Image)*

This snippet is what made my brain first pop

5/8/23, 8:30 AM

Hi Jim, I wanted to touch base now that you've been in the new role for a few weeks. Curious how the strategy is coming. Here to chat through how I can help when you're ready

Great to hear from you thanks for following up  
In week two of onboarding a class and it's going great  
We will need some marketing and sales ops help in no time  
We should reconnect end of this week if open to it ?

Absolutely. Let's do it. Friday looks pretty flexible on my end

5/12/23, 3:51 PM

Catch up at 5 PM est?

Hey Steve I'm so sorry I failed to send an invite for this morning  
Now I'm up camping for Mother's Day weekend where service is horrible  
Is Tuesday an option?

5/12/23, 5:55 PM

Yes no problem. I'm free after 11am Tuesday. Enjoy the weekend!

5/12/23, 7:13 PM

Sorry again I'll send an invite over the weekend

5/16/23, 6:03 PM

Forgot to ask. You mentioned the field reps are firstly residential focused, but as a company, what's the foreseeable blend with SLED? And blend with commercial private sector

It sounded like a first mover opp from my convos with Nevan. Just thinking through the blend of B2B and B2C across ops, marketing, etc.

Granted I don't expect anyone to know..just curious the strategy. By the 5th state, we'd know the formula and ratios of things no doubt

Good question

Eventually we'll be 80/20 resi/commercial

Right now SLED / Commercial wide open

We want to cut teeth on residential for cred but are already being pulled upstream prematurely

Liked "Good question

Eventually we'll be 80/20 resi/com..."

6/12/23, 5:38 PM

Paul's Landing restaurant right?

Yessir

We are seated in back

6/13/23, 1:46 PM

Hi Jim, again...so many thanks. Blessed to have this opportunity. Do you mind sharing anything and everything that I could digest - primarily the financial doc. Or, if better to wait til anything official kicks off that's fine given the nature of the doc

But anything that could benefit my convo with Derek later this week would help the prep

6/13/23, 4:53 PM

Hey Steve, you bet. I'll share some more content to help frame those discussions.

I hope the trip home is smooth

We loved having you both here  
Looking forward to the future!

Liked "Hey Steve, you bet. I'll share some more content t..."

6/18/23, 3:43 PM

Hi Jim, wanted to say Happy Father's Day from Melissa and I to you and Judd.

And another big thank you from us both for the hospitality in hosting us. We were treated like royalty down there and you gave us a lot of positive things to think about.

In short, should the offer be on the table, we decided that we are both 100% in on taking it, "expanding" to St Pete, and making this bet pay off.

I've talked through a strategy with Nevan to exit my current endeavors and Melissa has already applied for a Florida nursing license to explore that process.

We will pause a bit until we are a bit firmer on terms and timeline, but the aim would be to move quick after that.

Please enjoy your special day and let's sync this week?

Loved "Hi Jim, wanted to say Happy Father's Day from Meli..."

All of this sounds amazing and thank you for the kind wishes

Yes let's sync this week

Wednesday good for you?

Yes. Can be flexible around you. You pick

6/20/23, 1:34 PM

Hi Jim, calendar tomorrow is filling up. Would love to chat. Any time in the am or later afternoon tomorrow?

Sorry for delay in on vacation this week in Ozarks but I want to catch up. I have a call at 4p tomorrow, how is 4:30p for you ?

Works for me. I'm also flexible tomorrow afternoon so 430pm-ish works if it helps.

Delivered