

iMessage
6/25/23, 1:28 PM

Happy birthday Steve! Hope you're having a great day

Hi Derek, thank you!

38 but feels like 25 still. Going to be a great year.

Attachment stored in iCloud:
IMG_8441.JPG (Image)

Go phils

Attachment stored in iCloud:
IMG_8442.JPG (Image)

Emphasized "Hi Derek, thank you!"

38 but feels like 25 still...."

Great seats! Looks like a perfect day for a game

6/26/23, 12:30 PM

Hey would you be able to talk at 3 today instead of 330?

Yes

Thanks! I'll update the invite

6/27/23, 2:37 PM

Quick question...do you think it would help if I had someone I know living in St Pete area draw up a 3 month sublease agreement backdated to say mid-June. I would just pay them whatever for the sublease without ever staying there. It would help the paper trail I would think the more research I do

6/27/23, 5:26 PM

Hey sorry was onboarding our new hire in st Pete, I think you'll like her, great attitude.

I think it would, it's further documentation to support your stance. I just reviewed what I had to do in 2020 and I sent NY a letter from HR saying the company was going remote due to covid, a letter from my HR saying I went remote on March X and the spreadsheet showing a log of each day, I literally wrote where I was every workday of 2020. This was all to get NY to give me a refund since my home address was NY until august of 2020 and I actually got a refund.

You'll be a "FL employee" from initial hire with Solar First so you won't have to worry about withholdings but more that you will be granted residency by spending the six months and a day here

Full disclosure, I never had to establish FL residency so all of this is based on getting the refund of NY tax but I imagine a lot translates. I saved the check because I was so proud of it

My accountant told me it was all about the paper trail. I think one of my friends parents did the PA to FL residency transfer recently, I'll reach out to him too

Also, do you want me to put your start date as today or yesterday? We can do that if it would help and adjust accordingly. Thought it may look better if it's not June 30 on the dot

Yes please. Good idea. Let's go with yesterday. I also got the email from Kyle and getting onboarded with that this evening

Okay perfect, that give us until tomorrow to get the I9 done. I went to enter your info today and had this idea. Driving back from st Pete now so I'll do it when home

Ok great.

6/28/23, 9:33 AM

Morning Steve - apologies that the justworks docs haven't come over yet. I went to enter your info last night just to realize we never agreed on a title and I didn't want to disturb you at 10pm. Does Chief Innovation Officer work for you?

Yes that fits.

6/28/23, 11:45 AM

Great, justworks info coming over now

6/28/23, 3:10 PM

*Attachment stored in iCloud:
IMG_5378.heic (Image)*

7/2/23, 7:59 PM

Hope you're enjoying the holiday weekend. Is there a cadence call on the books tomorrow I can join? Or any daily or weekly recurring ones for me to hop on. Would like to be on as many as I can

Would also like to grab time to sync and formerly kick-off.

Yes, what works for you? Tomorrow the team has off (we did this day opposed to Columbus Day) but I'll be online all day. Maybe we shoot for 11?

Edited

Perfect. I'll set it up. Me, you, Nevan?

I think he may be off tomorrow, was thinking they were in Idaho. I'll do a group chat but let's let it and if he joins he joins but if not we can move through it just us

Sounds good.

7/3/23, 9:50 AM

Morning! Any chance you can move our call up to 1030? Guessing nevan isn't joining it

10:30am works. Just moved it.

Thanks!

7/3/23, 12:19 PM

Do we have any project/team management software like Asana in place?

We don't

Ok. Any you've worked with that you like or any preference? Asana is great. I use it all the time. Others are good too

It should be part of our phase-I

I like asana but haven't used it heavily so I don't have a strong opinion

Got it. I'll add to what I put together. Thanks

7/3/23, 8:01 PM

Steal Like an Artist: 10 Things Nobody Told You About Being Creative

<https://a.co/d/9YFAtd6>

I'd like to introduce this book to the onboarding and get it for everyone here currently. It's a 30-minute read. It's a mindset book. It will spark so many ideas. I want everyone speaking up and feeling creative, heard, etc.

Awesome I like that, I can't wait to read it

Awesome...give it a read first. I'll explain the context then so it's in sync with everything.

It's simple, but profound

7/5/23, 12:26 PM

Hey hope the day is going well! I have the meeting with Jami today to finish your onboarding with the systems but please let me know if there is anything else you need from me today

You got it.

I have my calls with Jami, Kyle, Joel today. Would like to speak with Dave 1:1 this week ahead of a broader team meeting next week where I can deliver some foundational stuff to a collective. If that works for you, Monday is flexible after 9:30am and Tuesday before 3pm.

I think Friday would be a good day for you, me, & Nevan to sync for 60 minutes. I will showcase the framework I'm starting with and foundational stuff I plan to present to the team

Wait. I'll be in St. Pete next week so can do that group presentation in person. Brain fart

7/5/23, 1:50 PM

That all sounds great. I texted Dave for his avails to setup some time for the two of you and will get that on the books. Yes next week is perfect for that, Nevan and I were talking and he is going to schedule some syncs with you this week as well to give additional context

Great. Thank you

7/5/23, 3:54 PM

I'm going to get some of the meeting scheduled for tomorrow, any times that you're not free that aren't on your calendar?

I'm booked up tomorrow from 1:30pm - 4:30pm but free otherwise and also wide open Friday

7/6/23, 9:48 AM

Morning! I am open this morning if there is anything we need to connect on

Can I grab 30 min at 11am?

15 min works. Just to sync quick. I'm making good progress

Yep 30 works

7/6/23, 3:46 PM

Any blocks that you're tied up tomorrow that aren't on your cal? I want to schedule a full team call

Attachment stored in iCloud:
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Minus my hvac guy coming late morning and some Solar first interviews Joel aligned I'm thinking 1-2pm looks good

Perfect, would you mind if we pushed the 10am call back by 30min so I can do another at 10?

Actually sorry disregard. 10 works

That works. My afternoon tomorrow has 4 interviews + the all hands.

Ok 10am works. Morning is flexible

3 interview through Joel. The 4th is Sarah

Just booked them all

I told Joel, we will have Calendly in the future (per Jami and I agree we need it) so we won't have to have Joel and I do the back and forth with the applicant

Perfect that's great on Calendly

7/7/23, 10:20 AM

Hey are you still free at 11? Would love to get you and Rick connected today

Yes lets do it

Perfect!

7/7/23, 11:36 AM

Solid chat with Rick. He brought up a ton of good insights for me to think about. Too much to type here but overall a good intro. He opened up about frustrations with Jim and the solar industry as a whole which is what I wanted...a very real perspective about the good and bad. Overall, good convo and will take a little time to nurture it.

Awesome, I'm free if you want to sync on anything from the call

7/7/23, 3:53 PM

On with nevan call you in 5

Liked "On with nevan call you in 5"

7/9/23, 9:40 AM

Just butt dialed you

Hey I'm at the gym right now, can I call you in 15-20 or need me to pop out?

Liked "Just butt dialed you"

7/12/23, 5:55 PM

<https://podcasts.apple.com/us/podcast/solar-sales-uncensored/id1676138924?i=1000615907159>

Liked "https://podcasts.apple.com/us/podcast/solar-sales-..."

Know what I'm listening to on the way up tomorrow

Highly recommended that I'm talking to this woman again on Wednesday so I can vet her if you're looking for someone

Awesome I am definitely interested in the green tax credits she referenced to you

7/14/23, 3:48 PM

I'm free 4pm-430

Edited

Or after 5

7/19/23, 1:46 PM

Was just circling back from the call, no need to call back if you're tied up

Attachment stored in iCloud:
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That's too cool. Literally the perfect dog for you

7/20/23, 9:53 AM

How are you feeling about it so far?

Like I should start drinking Rockstar

It's very good

The guys need this kickstart and tone right now . The guidance is fantastic

His knowledge is obvious. I have some complimentary thoughts to what he's saying but I'll add on my 2 cents in one swoop at the end.

My only worry...do people feel safe asking "dumb questions"

Emphasized "Like I should start drinking Rockstar"

Liked "The guys need this kickstart and tone right now"

Liked "His knowledge is obvious. I have some complimentary..."

Definitely some refinement need and I agree with the kickstart. Good call on the dumb question piece, I think that is something we will have to be conscious to foster

7/20/23, 11:20 AM

Will you be on the call at noon or the 330? I have the conversionally onboarding form I want to run by you before I submit. Need a little time so can we plan to review that at 330? I'm going to lunch with my hvac guy I emailed at 1230 today so 330 would be perfect

Yep 330 is perfect. May have to pause to take a call from the port Charlotte sale but I'll be on it

Was going to join the noon as well but we can cancel if you have a 1230

I'll keep listening to this until it I walk into lunch but can hop off to talk at noon. It's kinda hard to grasp this part from a far

Also...with enough recordings of Rick I could build a AI trainer for internal use

Liked "Also...with enough recordings of Rick I could build ..."

Can you share that recording with me please

Will flip it over when I get it, it's still processing

7/20/23, 3:16 PM

Epic lunch. I pulled in a realtor as well and we hammered so much out. The solar stigma is real in PA.

Keep forgetting the Zoho call is an hour and just started so it will run until 4, not 330 just fyi.

Whole team is on. Just shows the engagement

Emphasized "Epic lunch. I pulled in a realtor as well and we h..."

That's awesome on the feedback and interesting about the stigma in PA since it's more blue than FL. Sounds good on 4pm, excited for the call I have some good updates from this side. Awesome that the whole team is on

Conversionally said me getting the engagement form to them today vs tomorrow by 3pm nets out the same in terms of speed to scheduling the onboarding so we have that window to ensure it's accurate.

Fantastic

7/20/23, 7:11 PM

Hope the traffic wasn't too bad on the drive home. Just want to say how much I appreciate everything you've already done in this short time. Nevan is sick of hearing me say it but every day I am more excited about what we are building and what we have in front of us despite the work that it will take. Your impact on the org has already been immense and I can see that the team feels it as well

7/20/23, 8:39 PM

Man, I really appreciate that.

What has helped me the most is seeing that we have really high quality people. Outside of work quality, they are genuine, hard working people that depend on us, are coachable, who want to be heard, who are starting to speak up, contribute in new ways, etc. it sure beats the complacency you see in corporate.

Building culture that drives their success and fully supports them is so motivating. I get so much from my 1:1s. That's where it gets fun for me. That's where the innovation will come from so having them lean into me very rewarding. It's my favorite fun part about building a company from this stage forward.

Feeding off that, and feeding off the freedom to click back into my best self (the creative parts I forfeit in the corporate world), clicking back into who I am as a leader, etc....it's all very real for me and I don't take it for granted

7/26/23, 3:59 PM

Sorry need 5

7/30/23, 7:55 PM

Does the office have a projector and/or whiteboard available in the room we will be in as a team Thursday?

Edited

No projector but we have a 50in tv. We have the big flip charts that we can use instead of a whiteboard

Ok that works. Thx. I'll text you guys when taking off.

Sounds good!

8/3/23, 8:52 AM

Heads up, Dave didn't see my text and showed up. Nevan said he wants to just do it at the end of the day now

Ok paying bill now

I'm thinking we should pull the trigger. It doesn't feel genuine

But this is your call

8/3/23, 3:57 PM

Rethinking the books. Steal like an artist and think and grow rich...there are plenty so anyone who wants one can grab

Okay sounds good, I'll let everyone know

8/3/23, 8:13 PM

https://www.udemy.com/course/the-complete-solar-energy-course-beginner-to-advanced-level/?utm_source=adwords&utm_medium=udemyads&utm_campaign=LongTail_la.EN_cc.US&utm_content=deal4584&utm_term=_.ag_118445032297_.ad_532070163984_.kw_.de_m_.dm_.pl_.ti_dsa-1212271230479_.li_9051802_.pd_.&matchtype=&gbraid=0AAAAADROdO3oyncrm_AS2fIE3cMVJ0wsh&gclid=Cj0KCQjwoK2mBhDzARIsADGbjcrZc83UKhzzXcC2lq32VnVzRDcNgFcileuiYI-YEKam7mA_GC9t6B0EaAgF9EALw_wcB

Thoughts on something like this? Typical courses are \$10-\$100. Some are installation specific. Found a few more for sales

Just search Udemy for "solar"

Hmmm I'd say it would have to be Florida specific from a panel perspective because of wind lift but for the rest of the install it's pretty much the same

Agreed. I may screen one over the weekend. I wonder if the right short course could accelerate learning for new hires and I wonder if wind lift course content would be applicable to Florida conditions.

We could provide to new hires as a way to scale training. I'm thinking how do we scale what Rick teaches outside of filming rick's teachings.

Could also provide something like this to interviewees to prepare them for a final round type presentation. I think one thing we are missing in the interview process is heavier screening around their ability to learn and present back in a final round.

Then, if new to Solar and we hire them, they are one step closer to fluency on day 1. Something to consider

I like the idea of the presentation as part of the interview

These classes could be good if they have content on ac/dc or batteries

I'll check them out for that kind of content since I need to brush up too

Enphase university is supposed to be very good as well

Text message
8/3/23, 10:51 PM

I'll check them out for that kind of content since I need to brush up too

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Enphase university is supposed to be very good as well

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iMessage
8/4/23, 11:51 AM

wtf Rick? That's the opposite of what we discussed. Let's discuss at noon. I'm holding back what I want to say until we speak

8/7/23, 10:08 AM

Want to just jump into yours? I'm guessing Rick has the time zones wrong

Sure

8/7/23, 11:51 AM

No worries if you need to push our noon start time back

8/7/23, 4:39 PM

Hey if you have a few minutes to catchup after the permission ask let me know. Had a really good talk with my chiro and have some things to discuss in addition to the Crowther text I sent

Liked "Hey if you have a few minutes to catchup after the..."

10-15 min . I'll call them almost done

Been side slacking got me in trouble

No rush at all!!

Attachment stored in iCloud:
IMG_8701.JPG (Image)

This book is in that box. I accidentally took two copies back with me. This is the quantum leap book. It's 35 pages long but really it's like 20 pages tops of actual pages to read. Can read in one sitting. Let's run with this mindset. The book expands on this.

I was screening it to see if I liked it. So I didn't order many. Let me know what you think

Perfect I'll dive into it! Thanks!

8/7/23, 7:14 PM

Just to be clear the ICPs are the 4 we want them targeting right? Not identifying the 7 or so different profiles of buyers in our market?

8/7/23, 8:25 PM

Yes we should look at it in that context

Good point

8/8/23, 2:51 PM

Conversionly shifted to 3-4pm just fyi

Perfect That's much better for me

Check your personal gmail

There is a high level verification code

Sorry just saw this. Can you resend. Guessing that one expired now

One sec

Might be from Amex

Sent

483105 is your Amex SafeKey Verification Code for a \$1.00 transaction at HIGHLEVEL, INC.. Never share this code. Valid for 10 mins for Card ending in 66009.

Sent to Jami too

Bingo

8/8/23, 6:04 PM

Forgot the mention I submitted two expense reports. Category A is directly related to Solar first. Let me know if you want things recategorized. Lots under "entertainment"

Perfect I saw them come through but haven't taken a look. I'll pop in and recategorize if anything needs to be so it doesn't slow it down and I'll just flag it for you for the next batch

Very very curious for Rick's response on the solar shade structure email from Dave. I think these structures can be a massive opportunity for us. Curious how this landed with Dave

8/9/23, 11:24 AM

<https://a.co/d/8Fyimrb>

8/9/23, 1:56 PM

Should the mailer be black and white?

Color

Got it

Do you have access to adobe express ? I can give you my credentials when I hand over the draft so you can tweak anything within the doc. Getting it to 80% now

I don't but if you flip it over I'll import it to word since I'll need it in word for the merge

Ok

Hey Austin is in this room

8/9/23, 5:12 PM

Who all do we want headshots for? The full team?

Yes

Let's take everyone assuming everyone stays on

Sounds good I'll coordinate

Just saw the note on Dave so feel good about all headshots. Good for Dave

Great! I was very glad to hear that from her

My photographer is super embedded in the community too so it's a two birds with one stone situation

Liked "My photographer is super embedded in the community..."

8/11/23, 10:26 AM

Call went well, ran a little over. I had everyone go around the horn and discuss their weekly activity, everyone's sounded good except Joel. I was pretty disappointed with his performance, he was in his car driving instead of at a desk and it wasn't as if he was driving to an appointment or community activation. His update sucked, it was all high level stuff and nothing in the weeds and no direction or plan on what he's doing today. Meanwhile austin and Jared are combining to make 1/4 of Joel's salary this week and had great updates. The combo of a shit update and driving in the car for the whole meeting really frustrated me

Ok noted. He asked me during the meeting if I had time to speak this morning

I said I could talk in a bit and to call me

That was because I drilled into what he was doing today and when it sounded like 90min of work I asked him how else he was filling his day and he said he needed to connect with you on strategies so I told him he should text you about it right away instead of saying it on the call

It was like come on Joel, steve just talked about planning with you and you're showing up on a call with no plan for the day

8/11/23, 12:57 PM

I've called him to support and no call back. I'm purposely not going to call again or check in with Joel to see what he does today. Please let me know if you see anything different. As of today being end of week, Dave is secure in my book very happy and we are likely to let Joel go next week in person and I can do it

100% aligned

8/12/23, 1:54 PM

I can Uber tomorrow from airport tomorrow it's a late night. It's no problem. I land at like 11pm

No no I'll grab you. What's your flight info?

8/13/23, 9:13 AM

AA801

Got a 5 hour drive ahead of me and or can talk at airport to prep for this week some more

8/13/23, 10:26 AM

What is best for you? I'm tied up for the next few hours but free from 130ish on

Let's do 530pm I will be at my gate

I'll call your cell

Perfect

8/13/23, 5:29 PM

I'm in uber still. Cool if I call after security

Could be like 6-639

Sounds good no rush

8/13/23, 7:13 PM

Couple quick things...when you talk to Joel, assuming he's resigning...where does that leave any legit lead he has. My notes show Daniel Acesevetto - methodist church. Nothing else jumps out to me but I had asked him last week to set that up for me to join him this week

Also that roofer your dad aligned for us. He might be on your list to meet with this week but either way I'd like to pursue that

I emailed Daniel on Friday and haven't heard anything back

Idk if he has any others but I'll get the transfer from him

Also he has the one sale which is his friend

Ok so if he leaves or we fire him, we don't owe the commission that comes at time of install, correct?

Either way, if he could add in any contact detail from any leads/activity to the tracker, we could have Jared follow up with them. He has very little info in there and I asked for all contact info to be added

About to take off. We can discuss later just thinking out loud

No we don't the only thing we would owe him for is the finding fee on Jared so we have a bargaining chip to get him to cooperate

Liked "No we don't the only thing we would owe him for is..."

8/13/23, 9:53 PM

Just landed

D5

Seated Back of plane so will be a bit

Damn you beat the tracking by a lot. I'm about 20min away

All good. Will be great timing by the time I get off and use the head

Perfect I'm about 8min out

Up top same spot at end

Perfect 2min

Pulling up

8/14/23, 10:15 AM

Do you need me to jump back there?

8/14/23, 9:24 PM

I set it out in my bathroom btw

Nice I can use in there?

Oh wow hits the spot amazing

Can I borrow sharp sneakers for tomorrow ?

I'm ordering like 5 pairs shipping here

Edited

Loved "Oh wow hits the spot amazing"

Yep what size are you?

I range from 12-13 and could likely make an 11 work

12 is the sweet spot

Okay cool I'm 12 in most

Nice. I should have called out that my shoes today were in fact golf shoes. missed joke. I'll weave it in tomorrow.

Hahaha idk if anyone noticed

8/15/23, 11:41 AM

We good on timing for lunch?

8/15/23, 10:30 PM

Dave scheduled a 1pm lunch with a potential electrician partner at 1pm. Per Dave, he met this guy at a GROW networking event and "One of his lines of business is installing EV chargers. "...I have the lunch tomorrow with zoom tan ceo. Depending on your priority list tomorrow might be good for us to take as many joint meetings as we can now while we're in phase 1

8/16/23, 12:36 PM

Do you have a second to chat?

Call you in 2min

Ok

8/16/23, 2:13 PM

CRUSHED

Hell yeah!

You or anyone want five guys stopping in now

We didn't go to lunch with zoom tan ceo

Sorry just saw it all good

Is Jared rolling out before the 4pm with nevan? Probably best so we can talk freely

8/16/23, 7:26 PM

Just a blackened mahi sandwich with broccoli as a side please

Liked "Just a blackened mahi sandwich with broccoli as a ..."

Ordered. At bar

Thanks. Sorry about this but I'm sure you can guess what's going on

Liked "Thanks. Sorry about this but I'm sure you can gues..."

8/17/23, 9:01 AM

What's my window again to get the headshot? We just got done but I need 20 minutes to finish the edits to the weekly tracker

You have time

Should be until 930/945

Ok leaving mission bbq now

8/17/23, 11:09 AM

Do we need to move the 1pm crm meeting?

Yes I assumed I was here through Thursday when I booked it. It's not priority so will move and you don't actually have to be on it. Austin is presenting some research I requested. I'll tell him

Okay sounds good

8/17/23, 12:35 PM

I land around 3, home before 330-4pm latest. Let's sync end of day whatever time is best

Would 430 work?

Yes

Text message
8/17/23, 2:42 PM

Would 430 work?

iMessage
8/17/23, 4:30 PM

Sales call one min

Zero rush I'm on. getting settled

Sorry second call

Totally fine. Plenty to do. Ping me when ready

8/17/23, 9:15 PM

Melissa grilled me for 30 minutes on "why Solar" and "why Solar first"...I didn't even ask for it.

Her stone cold feedback at the end: "This needs to be crisper"

Love it

Hahaha that's awesome

8/18/23, 8:21 AM

Let's talk quick about agendas for the sales call and all-hands call. There is some overlap and CEO messaging stuff we want to get right.

I'm going to walk Lucy now and have my phone.

8/18/23, 2:28 PM

On with Jami and she's not loving the rick emails. From the deck he sent, to the marketing material he sent Jami, we should pull Jami into our 330pm and start with this topic

Let's do it

8/18/23, 4:13 PM

Left a Voicemail I'll let you know but I got it

Okay cool lmk if I can be helpful at all

We spoke. Was fine.

I'm changing the logos and other small changes i alluded and he said he will look at it over weekend when I ping him. Until we get through this phase it's all a little strange but I can work with it

Is it a necessary strangeness to get through this phase or something that can be mitigated? I'll help navigate it in any way that I can

Let me think that through

8/18/23, 7:21 PM

Hey do you have two min quick? Nbd if not nothing urgent

8/20/23, 7:13 PM

I have to do a better job of keeping our Sunday meetings short. And really all 1:1, team meetings, etc.

I'll prep each with bullet points on phase 1 related items. And I have a good sense now what doesn't require both our attention or even updates so can skip more moving forward

Maybe we do a review call earlier in the day so we keep Sunday evening just to planning? I just start hitting a wall for long calls on Sunday night

I like it.

Starting Labor Day I'll also be driving back from miami every Sunday so I'll 2.5 hours that are wide open for conversations

we shouldn't take more than 30 minutes per meeting for our 1:1s. Let's make it a rule. I'm phase 1 bullet points here on out. True divide and conquer. And that's the theme and tone I'm going to set with everyone out the gate this week via loom.

That's perfect it'll force us to be very on task. I really like the approach for this

Austin never checked ricks website. It's an issue across the board and glaringly obvious the message didn't sink in. I would like to correct this one

Across the team

And we won't accept requests for non phase 1 items. Just one example of the course correction message I'm thinkign through

Liked "Austin never checked ricks website. It's an issue ..."

Sounds good, yeah that website has so much great content for the sales guys

8/22/23, 9:31 AM

- 9am Thursday I am pitching Rick the "Why Solar/Why Solar First" story (slides 1-3 of our sales deck) via Google Meet. Derek/Rick invited. See calendar.
- Taking Rick's feedback to finalize "why solar/solar first" new sales deck
- giving new deck to reps this week (assuming leadership alignment on our most important story in the market)
- The revised sales deck is same order or topics as Ricks, so they will add in their variable components (PV Watts/OpenSolar, optionality, pricing)
- This Friday is on-site site survey training. Location is not related to Monday's presentation
- Next Monday in office is their training capstone presentation of the sales deck.
- Monday marks conclusion of training. Reps then required to focus solely on getting in-field top of funnel reps - focused on strategic partner handshakes, networking, etc. and I will be managing those expectations heavily.
- contingency plan: if we don't have agreement by Thursday the Why Solar/Solar First story is SOLID then they still present Monday, but present Rick's sales deck

Spoke to Rick. I'd like to text the above to you, me, nevan, Rick to align. Please correct or green light

I'm aligned on all, like that approach

8/22/23, 6:25 PM

Did you happen to record any thoughts or shots of creating the recent proposal?

No it took me 90min last night because I was toying with some things so it wouldn't be a good recording. I need to ask Rick if he has any tips on using the pool solar photo to overlay. I can do it easily with photoshop but don't want the reps doing that. Once I have that I can go in and record it

Ok I have an idea on this and luckily mentioned it in my fireflies call with Austin for the last hour. To discuss tomorrow but I think I have a good idea to build up training easily

For the overall solar presentation/proposal builds?

8/23/23, 8:29 AM

Finishing up with Dave still. Few minutes

Liked "Finishing up with Dave still. Few minutes "

8/24/23, 12:00 PM

One min

8/24/23, 8:07 PM

Wednesday next week there is an RGA networking group. It would be the second meeting Austin is attending for that group. He was there this morning. Told me it's the best group so far. Starts 730am next Wednesday. Doable?

The Hangar Restaurant & Flight Lounge, Second Floor Albert Whitted Airport,
540 1st St S, St. Petersburg, FL 33701

8/24/23, 9:28 PM

Yeah we can make it if we leave at 530

Would start the day off right. Having us both there to start feeling out the st. Pete landscape would be beneficial. And I want to see a st. Pete networking group to compare. Austin would also get that next level support to kickstart the territory launch. Lets do it

I like it. Also my business mentor that lives down the street may be down for a mock pitch tomorrow since the guys will be here. If he's free to do who do you want me to send over? He'll give us good feedback

Haha back to back to back

Pick one?

Yeah we could play it however you want, we wouldn't even have to tell them it's a mock if we don't want and we don't have to do it at all if you think it's too much

I will def take advantage of it. I'm thinking through it. What is the time window we have where he's willing to play the role for us?

I'd just send one person over. He doesn't know a ton about solar despite being friends with Rick and me so it'll be more real than role playing. He'll be a real customer for us in a year or so

If I had to pick one it'd be Jared

For confidence sake

I'll be up early we can talk it though just let me know when you can chat. I'm up early

I'll be at the desk by 715 so call any time after that

8/25/23, 7:41 AM

Will call soon on Jared pitch. But what about sales meeting. They are driving to you for 10am site survey

They should all be able to leave at 930 and make it here. Austin was going to beat traffic and go to a place in port Charlotte or punta gorda for networking so I assume he'll take it from a coffee shop or car

Perfect

8/25/23, 8:59 AM

I'll listen to call later and will be on my "open office" time 2-330 for rep dry runs and feedback but I'm helping these trucks get parking and it begins her now.

Liked "I'll listen to call later and will be on my "open ..."

8/25/23, 4:58 PM

Sorry I missed the 4pm. My meeting just ended

Good meeting!

All good. I'm heads down on a few things but can catch up anytime now or up to 10pm

Curious to hear about the meeting

Spent 90 min with the reps on pitches. Monday will be good to trim the fat with their talk tracks. Some frustrations but nothing abnormal

8/26/23, 11:21 AM

F9 2355

Frontier airlines 9pm departure arriving around midnight

No feasible options to change. I know you said you'd pick up but you don't have to. I could opt to get cheap car rental with Nevan's codes and can be on the road this week

Or Uber from RSW but car rental maybe makes more sense give I'm there until Thursday evening

No problem at all I don't mind picking you up

OK and I believe you said tomorrow was a bit busy, but I want to grab a little phone time to talk through the staples of the sales deck and if Nevan shared anything I haven't seen it

Tho the google doc has made progress so is that up to date

Tomorrow should be pretty open, switched some things around this weekend

Ok I'll text in the am. I have good progress

Awesome hope the golf is going well today too. Having a really good weekend with my roof manufacture buddy that will help us a lot with solar

8/27/23, 2:07 PM

Hey my dad woke up with a bit of a cold today, just wanted to give you the heads up incase you prefer a hotel to my house because of that

Ok thanks for heads up I'm good with staying at your place

Okay cool just wanted to make sure, never know how people's sensitivities are with that

I'll tell him to stay in his room lol

Takes a lot to give me a cold. Knock on wood, hardly get em

Liked "Takes a lot to give me a cold. Knock on wood, hard..."

8/27/23, 6:10 PM

What's your flight on Thursday?

Right now it's 9pm on Wednesday. I had a reason that no longer applies for making it Wednesday so I can move it to 9pm Thursday on same flight following day. Alternatively, there is a flight around Noon on Thursday but that cuts that day short so opting for 9pm Thursday on frontier

Okay cool just planning my Thursday out

Can I text you when I get at my gate to chat then?. Melissa can take me to airport but have to leave early and want to get work done at the gate. Will be arriving at 7pm at our scheduled time

Yeah around what time are you thinking?

Arriving at 6:55 so with tsa I'm thinking 7:15pm or 7:30 latest

Perfect

I can't seem to find the legal language for the flyers. Could you please resend by email?

Sending now

2434 is the garage code

8/27/23, 8:48 PM

*Attachment stored in iCloud:
front 2 options.jpeg (Image)*

2 options for front

*Attachment stored in iCloud:
biz card back.jpeg (Image)*

back^

Do we want the dual messaging on the back? I think it distracts from the overwhelming majority of the business card use cases which is consumers

We need the front to have the company larger, people need to know what it is at first glance

I imagined the overwhelming use of the cards would be strategic partners without question. That's where all the handshakes are going and will keep going.

Sending a couple more then heading to gate. Will move on as its close

Maybe one for partners and one for customers?

*Attachment stored in iCloud:
Screenshot 2023-08-27 at 9.22.07 PM.jpeg (Image)*

Attachment stored in iCloud:
Screenshot 2023-08-27 at 9.22.37 PM.jpeg (Image)

i was thinking of having the user decide pathway after scan. "are you this or that" then landing page

Otherwise its two QR codes per rep and two landing pages

i like the one first one of this batch.

About to board. Frontier so no wifi 🙄

Okay sounds good we can run through it in person and finalize. Have a safe flight!

8/28/23, 12:20 AM

Landed

Enroute. Probably 20 out unfortunately, flightaware had you at a 1241 arrival until I got in the car. I'll get there as quick as possible

Liked "Enroute. Probably 20 out unfortunately, flightawar..."

10 out

Perfect. I'm up top Frontier

Perfect 2min

One book bag this time so can just hop in

8/28/23, 4:35 PM

Attachment stored in iCloud:
Sarah Yammoul.vcf (Attachment)

8/28/23, 10:18 PM

We're both heading to bed, you have the living room to yourself if you prefer that. Night!

8/29/23, 10:18 AM

Leave in 10?

Works! I just got back inside

8/29/23, 12:22 PM

Taking off! Got delayed it was very close but I'm off

Have a safe flight! Hope the WiFi works

8/30/23, 8:15 AM

Attachment stored in iCloud:
IMG_6541.HEIC (Image)

Pretty crazy we got this surge even when a hurricane is 150 miles away

Oh wow. What's that like 5 ft?

Probably 3-4 but it tells me that the surge is going to be horrible close to landfall

Thats awful. I've been tracking it. Only silver lining is that Cape Coral avoided it

Yeah and it's going into a pretty sparsely impacted area but it's a poor area

8/31/23, 11:59 AM

Assuming no agenda items on calendar for noon so no call.

For 330 nevan call, I have Rick qualifying call at 330 and can join after if you guys are on.

Yeah I saw both you guys declined it

Sounds good I don't know if we have anything for 330 either

Ok we need the time back today sounds good. I'm transitioning at 4 back to the Rick deliverables to complete that.

Liked "Ok we need the time back today sounds good. I'm tr..."

8/31/23, 5:53 PM

Hey just confirming this role play is me with my house/the way I live but using the 2841 address as my house right?

Edited

2821 NW 46th Ave Cape Coral, FI 33993

Liked "2821 NW 46th Ave Cape Coral, FI 33993"

Right sorry 2841 is a spec house

Ok so 2821 good to go

Liked "Ok so 2821 good to go"

9/1/23, 8:01 AM

May be a few late for our 830. I'll give you a call on your cell

Liked "May be a few late for our 830. I'll give you a cal..."

835

9/1/23, 9:26 AM

The 6 month training schedule is one item that I'm fixing up this morning that is linked within one of my docs. It's placeholder recommendations and social was my first recommended theme out the gates next week

Training schedule for the Monday morning sessions?

Yes that was one of the items. I wanted to show the forethought for training post graduation

The Monday agenda framework and training items I want to milk in to Monday calls. But it's one thing I'm finalizing for you this am . You'll see it

Okay sounds good also do we need to continue our morning sync call? As it wrapped you were saying something about me not seeing it fully from your pov and I want to make sure we're on the same page

I have to make sure we both understand the magnitude of focus that needs to be on the marketing side.

The current pressure points are necessary but there is a cost.

It's an urgent conversation that needs specificity. It's my job to present it to you so we can fully understand together.

Then we evaluate the details with the same lens.

Let's get on the other side of your presentation and talk then, followed by my more specific business plan for marketing beyond conversion

Edited

Okay sounds good, I don't want to overlook that so look forward to syncing on it

9/1/23, 11:37 AM

Looks like your sim car fell out in my car. Hope you weren't looking for it

Ah I was!

I'll grab Monday

9/1/23, 6:15 PM

Just wanted to express appreciation for the conversation. I feel much much lighter

I'd like to discuss how/when it's communicated to the team. No doubt we agree that I present a winning deck before we communicate it. It's important I win that back.

My goal is that it tees you up well next week to message around our company wide transition of focus with your decision to shift me into a clearly defined dual-role as a co-seller to reps in the system that I'm also designing and building.

If it isn't crystal clear on the change , they will keep coming to me for sales guidance.

Also the time to be clear that reps will still have a cadence with me. They, and myself, will be our beta testers. I need them understanding how it will look and why it's critical.

I feel lighter yes but I have near term finish line to cross still, but regardless, having objective alignment is what I needed going into a weekend of 1A and 1B focus. Thank you clearing the path for that. Sorry for this novel!

Absolutely and I'm glad that you feel lighter, definitely don't want that dragging on you in a negative way.

Let's talk through the messaging and communication on the drive back Monday? Or before if that would be better

Again, I really appreciate the way you're approaching this

Monday preferred. I'll touch base this weekend as I prep

9/2/23, 12:25 PM

I will be sharing the detail around handing the inbound call volume for the snail mail campaign. Assuming you feel good about how I'm designing it (fairly simple and in line with our discussion) are we prepared to send 5k out as the first of 3 letters in the sequence? If not, what date do you have in mind and how can we make sure it goes out asap?

And this will be just one campaign within a broader marketing plan I'm showing you guys this week

We can have them go out 9/11 with a target receipt date of 9/15

Ok got it. enjoy the Saturday. Will touch base tomorrow

Thanks you too!

9/3/23, 1:53 PM

Hey I'm so sorry I've been pretty sick this weekend and I lost track of our meeting at 2. Is there any way we can push back to 330? If not no problem I can make it work

I have my draft at 3 but its low maintenance and I'm at my home office for it working so how about I send my proposal for Kyle's house I'm finalizing with a loom for a quick run-through of what my thoughts were.

Feeling good about it. I've done multiple houses this weekend

No don't want to mess with your draft sorry I forgot that's why we put it at 2

I can be free later too, but dont force it if you're sick

Your call. See what you think about my proposal and how you feel.

Okay that's perfect and we can always hop on at 230

Ok

Again I'm really sorry about this

Totally fine. Having the 2pm on my calendar gave me a deadline which drove a lot of progress

Want to just flip me the deck and I'll review then if I have comments we can hop on at 230?

Ok

Need 15

No rush

9/3/23, 8:13 PM

F9 2295

Perfect see you tomorrow!

Yep thanks again.

9/4/23, 9:52 AM

Have a safe flight

Thanks. On board. On time

Saw they're projecting a 1204 landing

9/4/23, 12:13 PM

In the cell lot

Just touched down

At front of plane at least

Liked "Just touched down"

Waiting for a plane to leave our gate

The one time I'm early lol

Laughed at "The one time I'm early lol"

Getting off

Liked "Getting off"

Can you go to arrivals (downstairs) from the cell lot I had to go there

I'm between door 112&111 but lmk where you come out and I can move, this is the frontier sign

Ok I'm getting close

9/4/23, 5:04 PM

Also just looked back at the email and Rick wasn't saying two proposals tomorrow just two by the end of the week

I want all of this in my inbox from each of you by the Close of Business on Tuesday "

I think it was this sentence at the end of the email that drew that question

Liked "I want all of this in my inbox from each of you by..."

9/4/23, 7:36 PM

Going to run up to Publix, anything that you would like for dinner or would you like to come?

9/4/23, 9:00 PM

Good for a 720am departure tomorrow so we can do breakfast at 8?

9/5/23, 5:33 AM

Liked "Good for a 720am departure tomorrow so we can do b..."

9/5/23, 5:07 PM

Got car. And I have your Tesla card.

Liked "Got car. And I have your Tesla card. "

9/6/23, 9:52 AM

Hey how are you feeling today?

After that drive, pretty goo. not like yesterday. A good day in st Pete is the cure

Great to hear! Not sure if you have it already but my garage code is 2434 - I'll be at the dinner tonight but feel free to use my office for your draft

Nevan offered to use his hotel credits for me at the Hollander. I'm not 100 percent and plan to be beat by days end. Would rather not drive 2 hours than prep for tomorrow. I'll be done here around 7pm so prefer to stay the night then leave for 9am with Rick tomorrow.

Changed Avis return to RSW. Flight is at noon tomorrow so I will go from ricks to RSW most likely

Sounds great, hope you can get some good rest again tonight

I'd hit the road by 630 tomorrow to avoid the Sarasota traffic

And saves me the airport trip, thank you!

You got it. Will be a great trip when over and lots to do this weekend. I'll be in touch

Liked "You got it. Will be a great trip when over and lot..."

9/6/23, 4:27 PM

Was just touching base, nothing important

9/6/23, 5:31 PM

I'm finishing up the day. Happy to talk after your dinner.

Saw 7 communities and two events. The drive throughs of communities was very valuable. Not an exercise that needs much repeating but necessary. Tree coverage in communities closer to downtown was way more than I realized. Still saw some Solar there tho.

I didn't have much in the tank last night to revise my Rick deck due to planning my route today. I'm going to grab dinner and work on that tonight.

Still have what I had yesterday but also just an early morning but I'm good

9/6/23, 6:46 PM

Liked "I'm finishing up the day. Happy to talk after your..."

Sounds good I can call you on my way home. Interesting on the trees but makes sense since it's an older area opposed to the further suburbs

9/8/23, 8:17 AM

Let's do a 1:1 this afternoon if you don't mind. I have a quick doctors appointment at 9:30am so I'll take the sales call at 9 via mobile. Can I grab 30 min early afternoon?

Yep let's do it. Can you actually cancel the sales call?

I can. Any reason why?

I was thinking it was already canceled since Rick is taking the team, last week seemed like more of a check in call and not sure if it's a good use of time. Do you think we should keep it for today?

I agree. Cancelled

Are we doing an 830 call today?

I was thinking of letting them know of the change but let's have them hear from Rick as he told me he would tell them Monday morning

Can we shift the 830 to the 30 minute 1:1 this afternoon? I'm heading out but won't be long

I'm focused on 1A all day blocked off

Liked "I was thinking of letting them know of the change ..."

Liked "Can we shift the 830 to the 30 minute 1:1 this aft..."

That sounds great. Yes my afternoon is free, I'm also doing a drive to Miami today so plenty of phone time availability

Ok great

Also I'm going to let Dave go today, it's been 5 weeks since nevan told him to get two deals and he didn't send the Tuesday assignment to Rick. In 4.5 months he has 1 solar deal and 1 pool deal

Ok he has been sending me his activity via slack and asked for a 1:1 today at 9:30am so do you recommend I cancel that? Rick told me this yesterday and I agree

Yes if you can cancel that would be perfect. Good excuse with the doctor

Liked "Yes if you can cancel that would be perfect. Good ..."

No activity of note right?

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IMG_8851.PNG (Image)

That's the gist of it

So no

9/8/23, 10:18 AM

Had the call with Dave, he wants to stay on in a 1099 capacity so he is discussing what that looks like with Rick. Rick will discuss it with him on Monday

Ok.

I'm back in the saddle. Locked in. I told Jared what to expect Monday with Rick because the requests for time today/weekend were high

Planning to call you at 2:30pm today

Liked "I'm back in the saddle. Locked in. I told Jared wh..."

Liked "Planning to call you at 2:30pm today"

Since you're the organizer of the Monday sales meeting can you please remove Dave from the recurring event and not send the cancellation. He'll stay on as a 1099 but won't be in that meeting

Yes

Done

9/8/23, 3:12 PM

Amex
3713 073203 82005
06/28
3712
2824 NW 46th Ave Cape Coral, FL 33993

Black card?

Yep!

Ok I will let you know before I use it, what it for, price, etc.

No worries I trust your judgement, just flip me the receipt

And don't buy any G6s with it lol

Laughed at "And don't buy and G6s with it lol"

Liked "No worries I trust your judgement, just flip me th..."

9/8/23, 4:39 PM

Do we use quick books?

I do

On a CRM demo. This is more an ERP which would pull in everything. Not what we need but just curious

Liked "On a CRM demo. This is more an ERP which would pul..."

9/8/23, 7:03 PM

Last thing I forgot on the agenda. I'd like set up a leadership call for the marketing plan discussion for Wednesday or Thursday next week and have a 1:1 screening in advance.

Let's do it

Ok include Rick I presume?

Yes but I'm not sure what his schedule is for next week

Ok we can schedule it on Monday just wanted to add that priority

9/10/23, 5:55 PM

Still good for 8pm this eve or want to move it up?

I'm working on sales planning and marketing related stuff today but have an agenda I can send ahead of time for us

<https://slime-wall-671.notion.site/Sunday-Agenda-Derek-Steve-60326fdb8abb44c4bec69287988c88b1?pvs=4>

Yep I'll be driving back so still good

9/10/23, 7:57 PM

Let's do phone not google meet. Want to call me when you're ready?

One house keeping item...I won't need your SIM card so can return it.

Melissa had her iPhone stolen at work which took me to Verizon store which led me to upgrading us both to iPhone 14 plus which has dual eSIM tech so I can be on my Verizon and your t-mobile. I get my new phone Tuesday

Oh perfect and that sucks on Melissa's phone

The family members of a person she was caring for stole it when she set it down and I tracked it to a pawn shop that denied ever buying it

Awful !

Wow that is terrible, can't believe some people

Feel like that'll be less likely in Florida

At least the st pete area

HaHa yes for sure. Counting the days

9/11/23, 7:33 AM

Morning! Do we need our 830 since we had last night?

Don't think so. I'm good. I have a quality Loom update I'm sharing shortly that will provide more from my end as well

Liked "Don't think so. I'm good. I have a quality Loom up..."

9/11/23, 9:03 AM

I am recording on fireflies. Fyi .

9/11/23, 11:02 AM

Are you flexible for 12:30 or 1pm for our 30 minute noon-call agenda? I have to run out for like 20 min or so but just to not rush seeing if you're good either way

Yeah very flexible

Are we sacking 12-130 and doing 130?

If it's just my quick agenda then yes that was my thought as I will have those two things and may slide in a small third but none require nevan for me

I can take him off forgot I kept him on

Okay cool I'll remove the 12

9/11/23, 6:02 PM

Hey sorry I had to jump to that call. Any work that you were going to give Jami that needs to shift to Kyle and me now? I'm free for a call too if easier

nothing I need immediately next two days but the marketing plan will show lots of support needed starting very soon so I will need to talk through solutioning those gaps so I dont end up in the weeds through September

I'm appropriately in the weeds a little now on purpose through this short sprint to stand essentials up but im immediately trying to remove myself

Can kyle be plugged in?

Yes

Okay I'll tell him to free up some capacity

And the timing isn't horrible and I can't adjust no issue

I need him appraising the CRMs I'm putting in front of him this week. Tomorrow at 10:45 he's invited to PipeDrive meeting and I sent him a 30 min demo recording of a Sunrise CRM and info on JobNimbus ...those are the three it's narrowed to

I'll summarize for Kyle and take the time he had booked with Jami tomorrow our PipeDrive demo overlaps that anyway

Liked "And the timing isn't horrible and I can't adjust n..."

Awesome thanks. I told him to depriorize a project he was working on to free up time so he knows this is coming

He and I are discussing on scrum at 845 tomorrow if you want to join to go over any of this to kick off the day

Ok I'll join that good call

He of course said he'll help in any way

I just told him family emergency

ok got it

9/11/23, 10:00 PM

Sorry late text not sure you saw my slack but can you share the final version of the mailer before calling it a night?

9/12/23, 6:59 AM

Sorry I went to bed early last night

9/12/23, 1:10 PM

Any luck with gmail?

It's propagating as of now with everything set to default. I had to remove the MX records entirely then read

re-add*

I'm testing now but its too soon

Liked "I'm testing now but its too soon"

I just started getting emails in updates and promotions

So that is a good sign

I just got an email

Yesss

9/12/23, 3:46 PM

Do you know the primary PIN number for grasshopper account?

I'm on phone support right now

I don't

Do they have the email of who set it up?

If it was me try 1116

But I don't think so

Or 0226 is Kyle's go to code

What is the billing address?

The 46 NW address not it

2920 SW 26th Terrace Cape Coral FL 33914

Would be the only other

Unless it was on Jim's credit card

Unless we have the pin or the billing address (above not it) for the original grasshopper account, we have to create a new account. I think that is the best option and just start fresh with your amex and the billing address associated to that.

for important company accounts I should be establishing accounts around you so this stuff doesn't happen

Yeah let's start fresh

9/12/23, 5:02 PM

Did you still want to connect this afternoon?

I really just need the heads down time.

I know I intended to screen the marketing plan and I'm close so I texted Rick asking for end of week availability to schedule the main presentation around his availability.

I can review this evening around 8

Let's just do it tomorrow and start fresh?

I'm open 6-3 other than 11-12

Ok. I'm heads down and will schedule that

Perfect

9/13/23, 4:02 PM

I left home about an hour ago and just left my Jeep with mechanic.

Ubering to the airport now.

I have started Jared and Austin on the VOIP testing so that will iron out the kinks. More to come. Moving quick.

Austin and I have a stack day tomorrow. Never heard back from Rick on the Friday marketing discussion. Still want to do it. Ready. Can screen with you quick on a call tomorrow

Sounds great and was that an email with Rick on Friday?

Whatever is best for you

I can text Rick again or just call him when I get to airport. Just sharing that I'm still aiming for Friday for that and had texted him Tuesday of this week. I got it tho I'll call him in an hour or so.

I'll grab you for 15 min sometime tomorrow to get your eyes on the phase 1 marketing and tech stack that I'm ultimately sharing. It has come together well.

Okay sounds good

9/14/23, 11:44 AM

Free late afternoon?

Or evening

Yep

Anytime until 530

9/15/23, 4:06 PM

I'm leaving office for that place you recommended. Let's catch up when you can. I'm free rest of day

I'm good now if you are

Fergs considered one of the best sports bars in South East America????

AND the upstairs is dedicated to eagles fans??

#home

No way on the eagles part, had no idea. Didn't know it had that title but it makes sense, it's been around forever and is a staple in the community

9/16/23, 4:50 PM

Quick question if you have a second...setting up AdWords

What is our legal business address?

Is our legal business name filed with an LLC in the name or is the legal name filed as just Solar First ?

Do we have a DUNS number registered?

1210 del prado s
Cape Coral fl 33990

I don't know the duns

No llc, we're a corp

Searched the DUNS database and we don't have one it seems.

I can apply for it or you when free. It's Free and takes 30 days or \$229 for 8 days expedited

I can run AdWords without it but we can't verify formally within AdWords without it which is beneficial for a few reasons. I'm good for now so enjoy the Saturday talk tomorrow

Hmm I thought we had one but I may conflating with holler. If we don't show let's do it if that helps with AdWords

It will. Also for local services listings we need it. Throttled without

Perfect! Thanks for finding that, that's stuff I'd never think about

You got it

*Attachment stored in iCloud:
Screenshot 2023-09-16 at 5.15.37 PM.jpeg (Image)*

i found this registered and was able to pull the DUNS# which is 060728835 - I'll forward you the email, but it seems this was filed for when we were an LLC with perhaps the first address used?

If correct, great, you'll just need to update our DUNS record another time

It's probably the Florida solar first llc that I was developing houses under

If it's the Florida llc always disregard. We are the Delaware C corp only

The llc was me standing it up in 2022 for when I was just going to develop and didn't need the DE corp

Is there a registered address then for the Delaware c-corp?

1210 del prado blvd s

The registered agent I'm not sure of the address off the top of my head but we have a Delaware registered agent

Ok that makes total sense. we can resume tomorrow if you can bc I wanna clean up all our google admin stuff its not up to date. All good today

Text message
9/17/23, 4:15 PM

Since we're both getting home today would you be okay with not doing the call tonight and making tomorrow mornings call from 815-45 instead?

iMessage
9/17/23, 4:38 PM

Yes that works for me. Still in flight as we speak. Lots of good stuff to review so 30 min will work. I'll share the agenda

Perfect!

9/18/23, 9:37 PM

Being this late Im going take you through it all in the morning. It's ready to go with one round of live copy tweaks and some context I'll add. I'm missing the Monday deadline as I'm not pressing the go-live button like I aimed for but you will see it's well done and brought to you in a way we can be efficient tomorrow morning and you'll see the whole picture not just lines of copy

If we can do 8:15am again it will be live right after

Edited

Sounds good 815 works

Have a good night!

9/19/23, 2:51 PM

Hey sorry just left my meeting with my neighbors. Think it's a sale

Its okay. I found support on the issue

9/21/23, 8:31 AM

Anything at all that you need I am here. Take the all time that you need and please clear the day entirely

9/21/23, 12:25 PM

Touching base. We are at home. Her aunt is a doctor and is coming here in an hour or so. I don't believe it is, but if the Conversionly call is contingent upon me on to speak to our reasoning, then we should reschedule.

Hey sorry just got back from Canterbury and saw this. That is good to hear. No need for you on Conversionly. Anything you need from me/anything I can do?

Work wise, just the final edits to the landing page in terms of copy. Read my and Nathan's email for a recap. If we get approval on copy, Nathan and I can hit go once it's stable. Jami can adjust copy.

Okay sounds good

Thank you. Otherwise I'm good. I aligned quick with Jami and Kyle. I'll keep in touch today

Sounds good but no need to keep in touch unless we can help

9/21/23, 5:17 PM

Just letting you know I'm thinking of you guys today

Hope all is well

Thank you for that. Things have calmed and she's sleeping but those are really scary moments.

I'll text you in the morning before 830 and know I can take the time if needed so thank you. Chances are it will be quiet and we can sync in the am

Edited

That is so good to hear. Glad she's getting some rest now.

Obviously no pressure on the call tomorrow

9/22/23, 8:14 AM

Good if we have a google meet around 10am or so?

I have a 10am but can do 1030 assuming the 10 doesn't run long

9/24/23, 3:37 PM

I am aiming for 5 PM I will call you then

Sounds good, hope it's going well

9/24/23, 5:03 PM

Might be my service

Car good haha that was scary. I'll text you in the am so you know my status

Good to hear! Sounds good. Safe drive

9/25/23, 11:18 AM

How's the airbnb?

Attachment stored in iCloud:
IMG_9018.MOV (Video)

Attachment stored in iCloud:
IMG_9015.JPG (Image)

Not bad! Feels great to land

She looks like she's adjusting well

Nice back yard

Has everything needed. Officially good to go

Love it!

9/25/23, 5:45 PM

Can we start at 605?

Yes

Thanks

9/25/23, 9:49 PM

Attachment stored in iCloud:
IMG_9034.JPG (Image)

Attachment stored in iCloud:
IMG_9035.JPG (Image)

They advertised this place as having a dedicated workspace. It did not. Now, ...workspace

That was the living room TV. Took over

I like! Solid sports setup

9/26/23, 8:03 AM

Morning, for the 8:30am 1:1 this morning, think we might be good after the call last night. I saw I was added back to the 8:45am scrum or is that optional.

Sounds good and that's helpful my dad got a flat so I'm behind getting to the office. I've always had you on the scrum but no need to join today, we can discuss it big picture tomorrow and see if it's something we should keep

9/27/23, 8:22 AM

Parking. Be right in

Walking in myself. Wreck on the way up

Want anything from the coffee shop

Large iced coffee please. No cream

Liked "Large iced coffee please. No cream"

This is taking forever

Normally they're fast

All good. I'm in office. Do we have an extra physical key for our glass office?

9/27/23, 12:41 PM

Can we do lunch at 130 instead of 115

Yea

Sorry this is running still but super helpful

Maybe 135

No worries at all.

I'm good in this conf room

But I have the rest of the day from lunch on for us to spend together

I'm good whenever

Coming up

In lobby

Oh my bad was in the office. I'll head down

I'm in office lobby

9/27/23, 2:55 PM

I'm in conference room 3A

Okay I'll be there asap sorry

9/27/23, 4:48 PM

What is Dave's status? Very strange lately. He slacks me, calls then hangs up, texted me a week ago how disappointed he was that I haven't called him. We should remove him from slack asap. Very odd

9/27/23, 9:36 PM

Hey I'm sorry I just saw this. Yes I forgot he was on slack. He is still helping with the jobs. I need to circle back with Rick on if he's going to 1099 or not

9/29/23, 9:19 AM

Curious was that call helpful or a waste? We ran 15 over which is atypical but I think it was productive

It was for me for sure. Good way to start the day

Awesome!

9/29/23, 1:59 PM

I'll threeway you for the call when you're ready

Ok I'm ready

9/29/23, 3:10 PM

We're in

She said download the Angie pro ads app and login with your email and Welcome123 and you have access to build out the page and reviews

Ok I'm logged in. I'll review this and get started this evening

Liked "Ok I'm logged in. I'll review this and get started..."

10/1/23, 4:08 PM

Hey would you be open to just making our call in the morning 30min instead of doing tonight?

Yep I'll also be on-site tomorrow am

Watching the eagles game on treasure island. Beautiful here

Awesome! I'll only be there until 1245ish

10/2/23, 12:45 AM

S

10/2/23, 7:10 AM

I am driving down now for the 9 AM sales meeting and CRM rollout training. Would you mind please texting me the positive energy office address?

12713 McGregor Blvd,
Suite 2
Fort Myers, FL 33919

Ok eta 8:49am I just passed the Sarasota airport

I'll call your cell at 8:30 if that works?

Perfect

We can also talk in 10min when I'm driving in if you want to

I'll be driving 740-820

That works. Give me a call when you're in route.

10/2/23, 6:30 PM

Hey I need to shift our morning call. Can you do after our Angi call?

Sure. We can also merge our morning 830 with the 430 contract discussion. Your call

That works for me!

Per your slack, yes I have outsourced through Upwork and other platforms a good amount

Had a few virtual assistants in the Philippines once. Had an early dev team in India I managed prior as well with bad experiences. They took our code hostage for more \$\$\$. Mixed reviews across the board

Edited

Thinking about that route for this pdf data project but not sure if that's the best path

Fiverr is the way to go for that project

Not Upwork

I've had really good results from fiverr

Okay perfect I've never done anything extensive with either

10/3/23, 10:41 AM

Sorry about that

All good. Kyle providing me the step by step in a loom with links, pdf example, etc. I'll review and shop for fiverr I think could be good and can hand to Jami to engage and manage. I don't mind having an eye on this either bc it's a process that if we could optimize, we could move quick on mailers with similar scraping requirements. All things I've done

10/3/23, 11:51 AM

Would love your help with guiding Jami on how to manage the fiver piece and any optimizations but don't want it to take much time at all since this is something I think Kyle and Jami can manage just need they playbook

Agreed. I have a 1-hour in person sync with Jami tomorrow at the office. I'll get her started and stay on track with my stuff

Perfect

Btw I'll be there Thursday for lunch with Sarah

Ok I have a weekly Thursday RGA meeting in clearwater over lunch time. How long are you staying. Would love to meet you both after but will be about 1:30pm-2pm until I get to office.

Just let me know what time you want to meet her and I can schedule accordingly

So we finish up with lunch when you're getting back

Ok I'll keep you posted.

10/3/23, 2:44 PM

Any shot we can do 5 instead of 430? Or even 445

Yep that works

Thanks

10/3/23, 4:50 PM

Going to be like 503

No prob

10/3/23, 7:08 PM

Missed one agenda item. Golf tourney. \$200 for individual. \$550 for bev cart sponsorship. Nevan agreed to that sponsorship option. If green light, can I use black card ?

Let's do it!

10/4/23, 6:11 PM

Well the rays blew it

Welp, just means we have a blowout for opening day March 28th and celebrate our 100th customer

Emphasized "Welp, just means we have a blowout for opening day..."

Which I could emphasis this twice!

Got you

Emphasized "Welp, just means we have a blowout for opening day..."

Loved "Got you "

10/5/23, 1:20 PM

Just parked

Perfect we're downstairs. Want a coffee?

Yes please . Iced black

Just walked in

To office

Perfect

Perfect heading up

10/5/23, 4:46 PM

Let me know how your 5pm goes and Good luck!

Thank you!!

I'll call you after?

10/6/23, 12:19 PM

I had a really good call with Rick for about 30 minutes on the truth about solar playbook. Just FYI.

10/6/23, 2:03 PM

That's awesome! My site visit went 2.5hr

10/6/23, 6:49 PM

Afternoon got away from me. Totally forgot to call. Heading to the food festival for second half now. Can call in a bit or another time

Whatever is best for you

10/7/23, 2:42 PM

Hey what is your plan for Monday? We have to reschedule the sales meeting for the foust install so trying to figure out the best plan for Sarah on Monday

The plan had shifted where Austin was going to go to the office in fort Myers to attend sales meetings and get camera stuff to bring back to st Pete.

I have a meeting I booked with Beasley Media with nevan joining remotely. It's at fords garage that bar there around lunch time Monday

Anything Monday morning?

Thinking maybe have all of the st Pete team meet at the office

In fort Myers?

In st Pete and have you guys join the call from there so Sarah has a good group for her first day

Got it I can run it remote

From st Pete office

Perfect I'll tell Sarah

10/7/23, 7:27 PM

I know you're off today and having a good time at the game, but just a soft reminder to nudge your friends for Angi reviews.

10/8/23, 3:39 PM

Hey hope your Sunday is going well. For tomorrow what time will you be the office in the morning? Just want to make sure someone would be there to greet Sarah. I can also come up tomorrow

Thinking I'll come up and I'm sure we can grab some time together to to go over what we were going to on the phone Friday

I'll be in bright and early. Your call on coming up or not. I'll be ready for the sales call either way as well as marketing. Can talk after eagles game tonight to prep quick if it helps us be ready for the week

10/9/23, 7:26 AM

Good Morning!

Just getting into office. You on your way up to St Pete or staying in Fort Myers?

Morning! Im going to stick in fort Myers

Ok sounds good. talk soon. Ready to roll

Emphasized "Ok sounds good. talk soon. Ready to roll "

10/9/23, 3:10 PM

Would starting at 430 be an issue? No problem if so

Works. Won't be the full hour and Jami and I are in 1:1 meeting so we're good

Perfect appreciate it

10/9/23, 5:47 PM

Tomorrow on our morning call can you take me through the items you're working on overall with a specific focus on the items that will result in in-home sits with customers for you to get that experience

10/9/23, 8:17 PM

Yes I can

10/10/23, 11:48 AM

I'm waiting for Melissa to come out at the airport, but I wanted to share a quick thought. Let's have a half day together in Saint Pete on Thursday or Friday. Whatever works and I'll check my calendar later as well but in that half day, let's iron out the contract please don't take any time out of today to focus on that, or perhaps even my expenses, but everything we are discussing. We can really get into in person and come out the other side in a great spot. I have some ideas I'm developing and I want to talk about them all in one breath.

I think that is perfect and it is always so much better in person. Thursday would be best for me if that works for you

Attachment stored in iCloud:
IMG_9258.JPG (Image)

We made it to the other side . The eagle has landed

Thursday it is. After my RGA lunch

Emphasized an image

The real question is who was more excited you or Lucy

Sounds good let's do that and then maybe the three of us grab dinner or a drink? I know you guys haven't seen each other much lately so totally understand if you don't want to but would love to actually meet Melissa since it was only the 5min at naked farmer back in June

We are in for din Thursday

10/10/23, 2:12 PM

Perfect! Sorry to bug you on this since you're tied up but did you see the new Angi lead come in for Sarasota? I can route it to Austin

I reached out to him when it came in.

Meaning I reached out to the lead when it came in

And we just got a call via organic search into the new company Aircall line. He wants someone to take down panels and put back up after his roof is re-done and I know we don't do that just want to 100 percent confirm. I said I'd call back so just checking. They are in working order and not what we want.

Liked "I reached out to him when it came in."

Liked "Meaning I reached out to the lead when it came in"

Awesome! One of the first organic ones

Where is he located? If it's Lee or Charlotte county we may do it

10/11/23, 2:53 PM

You're friends with someone with the last name Poole? It's probably my very distant cousin. All of my family is going to think I made that review up haha

Yep that's my buddy that lives here on Isla Del Sol, St Pete

William Shipley Poole

If you're somehow distant cousins then your genetic makeup is highly questionable haha jk

Hahahaha too funny. My sister was Monica Piotter and changed to Monica Poole because she liked it better than Piotter

haha

And just to confirm...no camera equipment coming tomorrow correct?

I have a solution no issue, but will want it for the larger video shoot im planning. Meta can be done with a phone. I may pick up a mic, but I'll test. Depends if you're brining anything tomorrow

Oh sorry we didn't get to that. I was supposed to have drinks with my treasury buddy friend Sunday night and he canceled when I was dropping my friend at the Lauderdale airport. My original plan was to grab the equipment between the airport and drinks but when my friend canceled drinks I completely forgot about the equipment and started driving across the state and remembered when I was at the charging station. I'm really sorry, I forgot to bring it up earlier this week when we were talking

All good! I can totally adjust.

10/11/23, 4:31 PM

Fort Myers Chamber is denying our request to sponsor, but allowing me to play. Can forward their email but the sponsorship is for members only. Only learning this now. Did you say you knew a former President or similar? I mentioned your name, but they didn't know of you. Let's discuss tomorrow. I'm forming an agenda for it, so this is on there, but a quick item to move on from

Yeah I grew up playing baseball with the presidents or one of VPs kids so it wouldn't surprise me if the dad didn't know my name

I'll take a look at the email. We probably want to become a member

Ok sent

10/11/23, 6:03 PM

Hey what hours are you planning to be at the office tomorrow so I can make sure I'm clear

I get back from RGA lunch meeting by 1pm. It's in "Clearwater" but only 20 min from office

For us, I blocked 1pm-4:30pm.

I have a wrap up call with my accountant at 430-5 to finalize 2022 taxes if that's cool, then could meet Melissa for drinks

Perfect!

10/11/23, 8:01 PM

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IMG_0176.JPEG (Image)

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Fergs is the best. Melissa and Lucy joined for the Phil's game. Truly a Philly bar here . Feels like home

I love it! such a good spot and it gets nuts on rays game days

10/12/23, 12:53 PM

How is your timing for 1pm? I could do 1:30pm. Transitioning yo prep for our 1:1 and building list of topics. Im in 3C downstairs

Let's do 115 or 130

This weather is getting me. Want anything from Kraft before we start

Please. Iced black regular coffee would be awesome

You got it. I'm going to swap the monitor to Sarah's car so let's do 135

Liked "You got it. I'm going to swap the monitor to Sarah..."

3C

Shit I just saw this was in the office

Want to do via call?

10/13/23, 12:30 PM

Sorry was going to call you to catch up on fort Myers chamber but remembered you're at lunch

10/13/23, 3:54 PM

Melissa just picked me up. Can I call you when I get back in like 10 min ? No need for google meet right?

Yeah the battery just arrived

So I need time anyway

Once home, I'm good so call any time . Zero rush

Sounds good delivery was a synch so I'm back at my desk

At my comp. Can join google meet

*Attachment stored in iCloud:
IMG_6926.HEIC (Image)*

10/15/23, 8:02 PM

Hey apologies for the late notice but we have to push the start of the sales meeting back to 10am tomorrow

10/16/23, 7:21 AM

Morning!

Saw your text regarding the sales meeting shift time to 10am.

I'm heading into St Pete office right now. I have a new lead I'm visiting this afternoon in Gulfport.

I was debating coming down for the sales meeting but with the time shift I'll be pushing the timing.

I'll give you the full update at 830am. All good stuff but won't be in-person today.

Goal this week is 90 percent sales activities

Sounds great!

10/16/23, 9:38 AM

Forgot to tell you. My buddy who got the Tesla got it on a 24 month lease and it was only like \$440 per month for a Y. He was saying they apply the tax credit to the lease or something along those lines regardless of your income, he didn't have time to explain fully but I know you're in the market and I was blown away by how cheap it is

Is the Y what you have? Or one below ? I'll brush up on the models but either way below \$500 is nuts

The Y is the entry suv so like my dads but an suv

I was blown away. I save \$250 per month on the delta between my gas expense and electric expense

Edited

And that was him upgrading the paint and interior which adds 4k to the sticker price

10/17/23, 8:03 AM

Morning, mind if I skip morning sync and I can listen to the scrum if needed. I'm popping into the office now and am hitting the road. We have 30 min 1:1 at 5pm if that will suffice.

I'm on 1:1 8:30am

Sorry I thought you said skipping it

Yup didn't know you saw it so we are good to go

My fault I had an apt this morning and was going to take it from the car but saw your text and failed to acknowledge

Have a great day!

10/17/23, 3:32 PM

Didn't mean to call you if the missed call came through

Ok got it

Thinking 5 or push?

Push. I'll call you at 730pm and take the larger window. I'll be online likely 7pm-9pm this evening

That cool?

Yep I just have a hard stop at 8

Ok. Likely 20 min will suffice

I'm on a roll

Perfect

Love it!

10/17/23, 7:30 PM

I'm online so I just joined google Meet but cell works either or

10/18/23, 8:31 PM

*Attachment stored in iCloud:
IMG_9336.MOV (Video)*

Melissa got the tour of this place today and loved it. We walked by it this evening and felt like it could be the spot. Available Nov 1st too.

Tomorrow 830am was the only time for me to see the insides. I could easily do 8am or 815am tomorrow for morning 1:1. Or right after scrum if that works

That's awesome! No problem at all! Let's do 8?

Yep that's preferred time

10/20/23, 8:50 AM

Attachment stored in iCloud:
IMG_9339.JPG (Image)

We got one!

I'm calling him back soon. Quick chat. Sounds legit

Thank god!

I'm calling him back soon. Was non issue. He confirmed he had new roof

10/20/23, 5:22 PM

Should be done here in 30-60 minutes

Sounds good want to meet for dinner on your way over here?

Let's do it.

Give me a call when you're leaving and we can figure it out

10/20/23, 6:39 PM

Want me to order you a drink

Parking lot is a zoo

Yes

Anything specific?

Any beer just pulled in

At the inside bar to get the drinks

10/20/23, 7:55 PM

Oh please park on the big door side/my side of the driveway, my dad will probably be gone early tomorrow

10/21/23, 9:17 AM

What address do you want on your contract? Mine?

Yea that makes sense. Probably a few days away from knowing our next actual address so can alter then but doesn't really matter

Okay cool and since this is technically from 2824 NW 46th Ave Cape Coral, FL 33993 it probably makes sense to match your other docs

Ok that makes sense

Leaving meeting now. Home run. Very good stuff. Let's talk when you're driving.

Awesome! I can step out if the gym now if you want, I'll be done in 20-30

Not urgent. Just awesome. Let's me get my drive started

Emphasized "Not urgent. Just awesome. Let's me get my drive st..."

Perfect should time out well with you hitting 75

10/21/23, 12:03 PM

I have literally 1min question before sending the contract over. Can you give me a shout when you have a minute

Edited

Wonder if there are any church golf tournaments? I remember the one I grew up at would have one and it would be right up our ally even for an Austin because it's typically business tied to the church and a ton of the church volunteers which are perfect for our non profits

10/21/23, 8:12 PM

I have to list an employer reference for a rental application. Not sure you'll get a call or not, but need to list your name and number. That cool?

Of course

10/23/23, 9:53 AM

When you do the proposals with Rick can you do the godaddy code with him to unindex solar first sales and just walk him through it

Yes

What time is operations done just so I know what time I'm reviewing everything with Rick

Just finished. He's heading home now

10/24/23, 2:35 PM

Must be where you are in my favorites list, I keep accidentally calling you. Sorry

10/25/23, 2:04 PM

Good luck on the site visit follow up!

Great first meeting with Brad in Cape Coral. Met his wife briefly and they will take time to review the proposal. Was in line with price options he expected. I feel pretty good about it. They just bought a new dock, boat lift, new roof, etc so I get the sense they are busy and having fun doing all these projects. Made a strong case to be a priority so now we wait. And on to the next as we speak. Heading to Venice to deliver the Panasonic proposal in gated community

Awesome! That is great

I'm on the road to Miami if there is anything you want to chat through

10/26/23, 8:29 AM

Morning, I need 5 min. I'll be on at 8:35am

Liked "Morning, I need 5 min. I'll be on at 8:35am"

10/26/23, 4:54 PM

May be 2min late. Ran down to grab a quick bite and it isn't ready yet

Ok

Let's take 5 each need it myself

Liked "Let's take 5 each need it myself"

10/27/23, 5:15 PM

Hey,

I'm just glad you're okay. Thank God.

Secondly, we got your back. Everyone here can play a role in filling your shoes for the interim. Whatever you need, we can handle it.

No need to reply to this text ...just sending prayers from Melissa and I.

If you need anything at all, we are here.

If you need a nurse, I married the best one in Florida

She's \$50 an hour, but willing to lower her rate to work at Hotel Derek. But seriously, anything at all...we are a call away

Hahahaha hopefully it stays hotel Derek and not hospital Derek

Thank you! I really appreciate it. Very very lucky

Loved "Thank you! I really appreciate it. Very very lucky..."

What can I do to help in short term. Name it

Or let me know later. Get well please

Thank you! I won't be able to drive until we figure out the root cause of this so I'll need you guys taking all of the site visits

And won't be going to Tampa

➔ Replying to Derek Plotter, 2023-10-27 17:20:11: « Thank you! I won't be able to drive until we figure out the root cause of this so I'll n... »

Done

It'll brighten things and distract slightly to learn that we got another Cape Coral new roof inbound call today. The ship isn't slowing down my friend. We got this stretch. The cards are falling in our favor. The hard work momentum, and the A players you assembled, will carry us all through

Nice! Thats probably from the second batch of letters that just went out

10/30/23, 8:39 AM

*Attachment stored in iCloud:
IMG_7032.HEIC (Image)*

10/30/23, 11:04 AM

Hey can you give me a ring when you have a minute

10/31/23, 8:12 AM

Morning,

I'm at my Airbnb we moved out of doing a walkthrough with the owner. He's open for a quick coffee nearby before I head in to office. He's got a handful of properties in st pete area. Given the day ahead just checking in quick. I'd be in office before 930 give or take

Morning, for sure, I've got a massage from 830-10 so I won't really be getting back on until 1020 today

Oh man that's a great call actually. I'm scheduling one asap

Talk soon

Yeah I'm trying to get ahead of all of this, the chiro said yesterday that I only have one accident issue we have to work through so trying to jump on it before any muscle memory is created

10/31/23, 10:11 AM

I'm finishing up with Jami. Do you want to keep the 2pm social call? Jami booked 1 hour. I'm asking her to pre schedule an everyday post in our social scheduler for month of November and have eyes on it. I think we should take back the hour all thing considered

Free for a call now?

Still with Jami. Free in 10?

Yep

Just give me a call

10/31/23, 2:41 PM

Just like anything I welcome any feedback on the termination process

Very professional. It was also very clear. Timeliness = respect for others. Her response stamped the decision

11/2/23, 7:54 AM

Safe drive back up?

I left later than planned. I'm pulling into my driveway at 8:10 and can be at the office walking in by nine which is probably for the best. I reserved the conference room for an hour starting at nine I just might need until 820 or 825 until I'm listening to our prep call so I can rinse off and change

Sounds good let's push to 830 to start

I'll text Kyle

We didn't discuss the second proposal for Naples, Angie lead but I sent it to Rick and I'm now getting competitor pricing to beat sent to me at 9 AM by the homeowner. I'm just having trouble getting confirmation from Rick that he can speak this morning or just putting that on the radar in case you talk to him, needs to be a quick turnaround.

OK we spoke and he'll be on the road and I can call him later

11/2/23, 1:29 PM

Didn't mean to call you idk why this always happens with you

11/2/23, 4:47 PM

I declined the 5 pm but can make it happen I had to head home early so I'm free for a quick update call and would like to touch base for tomorrow but we have company this eve getting ready for

Okay I'll call you in 2min. Have been on calls since 230

11/3/23, 8:28 AM

Hey are we doing our morning call today?

On with Rick.

Let's skip it I'll call you on drive

Liked "Let's skip it I'll call you on drive "

Just got off thought that would go longer I can talk your call.

Just saw this

All good I'm doing the print now so will do this right and call on drive

Perfect can you also bring all of the computer equipment especially the laptops

Liked "Perfect can you also bring all of the computer equ..."

Monitors , everything?

Can do

Only the extras and if you have space

Figured it would be cramped in the office

Obviously keep whatever you want for your house. It'll just be stored under my bed

Yes super tight in there. Okay I'll bring what I can down. I'll tuck Sarah's monitor aside for myself as I do need one for home office

Perfect the only thing I need today is Sarah's laptop and password. Everything else can be whenever is convenient for you

11/3/23, 11:40 AM

What time are you expecting to get to my house today?

Derek / James / Kyle
Friday, Nov 3 · 12–12:30 PM
Google Meet joining info
Video call link: <https://meet.google.com/jkk-wmqu-hmy>
Or dial: +1 540-835-0186 PIN: 776650654
More phone numbers: <https://tel.meet/jkk-wmqu-hmy?pin=4466095056351>

I'm waiting room for call

Eta is 2pm

Oh sorry I slacked you that we're on FaceTime

It won't let me add you

I'm available and on my way so patch me in or we can catch up later?

11/3/23, 1:59 PM

Taking a quick shower but the door is unlocked

Just pulled in okay

11/5/23, 6:05 PM

*Attachment stored in iCloud:
IMG_9525.JPG (Image)*

Austin will love this. New chapter, new feel. Got the company values and mission statement up but need frames and few other things but this is a good feeling

Love it!

11/6/23, 9:49 AM

Obviously that's on me, we'll chat with Rick on it

It's on us both

11/7/23, 8:28 AM

May be 1min late. Just walking in took us 55min today

11/7/23, 11:25 AM

Just an FYI on timing ...My ETA is 12:15 PM and Rick confirmed he can join Kyle and I for the 1:30 PM meeting with my Naples deal (Victor).

I have all the prints in a big plastic moving box and I can leave my jeep unlocked to pop the trunk if you are heading out or I can bring in the box to the office

Grabbing tacos with Kyle, want anything?

They have burritos and such too

It's the first day of it and it's in our plaza so you can also just pop over yourself if your prefer, 1min walk

I'm all good thank you for asking

11/7/23, 3:28 PM

I had a really good feeling about my community activation I've been working and hyping a bit. Rick loved it. He is digging in with me on the plan. It's exactly what he's talking about and I can help the reps through this experience. Heading to Cape Coral deal now for pics etc

Awesome that is awesome!!!

Great day today

11/7/23, 4:58 PM

Just started the drive back. 2 hours on road

Perfect cool if I call you in an hour when I'm back?

Can you call me as soon as you are able before you head home? There is a small issue at the home I just left somehow the work I did to take the panels off the breaker boxes lead to the garage door having no power and he cannot close his garage door for the night, I called Rick who thought something was blocking the sensors but that is not it

*Attachment stored in iCloud:
Screenshot 2023-11-07 at 5.24.33 PM.png (Image)*

It would be an hour 1 way to turn around for me. He's upset and says he can't sleep there if the garage door can't close

Jared is going to swing by at 9:30 PM tonight to manually shut his garage. I have 50 minutes until I'm home

11/9/23, 6:27 PM

*Attachment stored in iCloud:
Screenshot 2023-11-09 at 11.57.41 AM.PNG (Image)*

I'm trying to get Rick's time to talk through some of the product nuances of the competing proposal but I wanted to tee us up for tomorrow mornings conversation to get your perspective on the above objection that I'm strategizing around. No need to reply tonight just wanted to plant the seed how to present our sustainability model as a young company

11/10/23, 9:51 AM

Hey we landed a little bit later than expected so I'm a bit behind. Is there anything bottlenecking us for today that can't wait until Monday?

I know Rick is extremely busy today and this weekend at his event

No bottlenecking. Anticipated this and secured time with this deal through the weekend. It's hot but has higher level obstacles. I'm good for today. Go crush

I'll share my Gulfport community activation plan on our next call

11/13/23, 7:36 AM

Good morning, will you be in the Fort Myers office today? I am driving down now with an ETA of 8:50 AM. I have the printed mailers with me.

Morning! I'm not, I'm over in Miami this week but I think the rest of the team will be there.

Oh duh that's right . Talk at 830am

I assume Rick will be in Fort Myers correct? Or is he still at the conference? I haven't heard back since early Thursday morning

I have a list of things to grab his time for

I believe he'll be there, I didn't hear of any travel delays

Just calling me at 830 since you're driving?

11/14/23, 7:51 AM

Morning! Does the 830 call not work today?

Whoops just saw your slack

Shuffling a bit this week . Let me know if something doesn't work on your end

And had good call with Rick yesterday just to close that loop.

Full brief at 5

11/14/23, 5:03 PM

I'm on the call but need a quick 2 min

Liked "I'm on the call but need a quick 2 min "

Gives me time to use the bathroom

11/16/23, 8:05 AM

Morning! Are we doing the 830 since we have the 11? I can but just making sure

I was thinking of asking the same thing. I prefer 11am and cancel 830 for today

Sounds good let's do that

11/16/23, 7:39 PM

Good convo. Needed to happen. It will translate well into the 30/60/90.

Just to share where my heart is....I truly hope to reflect on these early days fondly as the "shitshow good ol' days" of what we survived and built together.

I want to build something I believe in. And I believe in what Solar brings to the world. I know what fake passion in a product feels like, sadly. But that ceases to exist for me in Solar.

Without hesitation, I believe we are far more suitable than any company to bring good solar outcomes to the world.

And a \$350k base wouldn't sway me. In a sick way, I like the battle scars, I want the bloody field of battle, I want that team victory, not victories by individual commissions.

I'm here for that...Anything else bores me. They just can't be self-inflicted battle scars. That's where you keep me honest, so I have much thanks for your style and guidance. It's been a true honor.

Anyway...I failed to say one thing earlierand that's happy birthday. Enjoy the evening

11/17/23, 7:59 AM

Thanks Steve, appreciate the note and looking forward to what we have in front of us and aligning on it all. Should we lock in some time to go over the 30, 60, 90 on Tuesday?

Sure what time is best for that Tuesday

11/20/23, 8:09 AM

Are we still doing our 830 or are you coming here in person?

830am virtual . Rick and I communicated last night about a change of plans today. I'll run you it later.

Liked "830am virtual . Rick and I communicated last night..."

11/21/23, 8:00 AM

Morning , same thing for this am I declined 830. Talk at 3, cool?

Yep 3pm is perfect

Let's do the contract discussion on the backend of the 3pm. That cool?. The order of convo is better and timing on my end I'll be driving home taking call there.

yep that's perfect

11/21/23, 10:58 AM

I just booked the Angi's lead that came in this morning. It's in Pasadena / St Pete just outside one of my three target communities. It's at 2:30pm today. We have a 5pm 1:1 scheduled. Can we roll 30/60/90 and contract discussion into that time slot? I'll be in the office then so nothing overlapping.

Do it all at 5pm?

Yes

If that works for you it works for me

I just have a hard stop at 545

Ok how about I just put the contract notes in writing you can review whenever so that's a lesser priority for 45 min. I'd like to really focus on the 30/60/90 that's most important today

That works

Great thank you.

11/21/23, 5:57 PM

5pm tomorrow for Wilfried Hanke. He has a doc appointment at 2pm and you only have the afternoon. Hoping that works with your schedule

And added 11-1pm for Sunday at your house

11/21/23, 7:35 PM

Can he do earlier like 330 or 4? Don't want to keep Kyle out that late the day before Thanksgiving

I'll call tomorrow and ask. He asked for 5, not 4, to have a buffer just in case

11/22/23, 11:37 AM

Wilfried Hanke said if he gets home at 4 he will call me. Expects no later than 5pm. His best guess is 430 he will be home. Best I could get. If it's a huge pain we can push to next week I understand and is what it is

Let's just stick with 5 and get it done with

Liked "Let's just stick with 5 and get it done with "

11/22/23, 3:37 PM

Below is the address.

And I know it's 5-10% chance, but if you decide he is competent and/or he has family close by and you see a path forward, but it's then a sub panel pricing issue, then take the commission out of the equation to get margin back.

I know it's a small card to have in your back pocket given all the variables but it's there if it helps.

Wilfried Hanke Phone / Address below. Thanks again

2306 Southeast 15th Terrace, Cape Coral, FL, USA

Liked "Below is the address.

And I know it's 5-10% chan..."

Thanks. For Sunday can you also outline the plan for Angie going forward and how leads are going to be distributed to the team

Sure no prob. I can send an outline ahead of time if it helps

Of the agenda as a whole I mean

No need would rather just go through it all at once unless you need my feedback on specific things

Liked "No need would rather just go through it all at onc..."

For hankie did he ever get a fully executed contract back?

He did

Okay via mail or just dropped in his mailbox?

I went back and delivered it to him in person when I returned to retake the site survey pictures Rick asked for.

Okay got it

He just called he's home

Perfect just waiting on my dad to scoop me

11/22/23, 6:30 PM

No go?

I'll call you in a few

11/23/23, 4:32 PM

Happy Thanksgiving, hope you and Melissa are having a great day

11/23/23, 8:53 PM

Thank you! Sure are. And same to you . See you Sunday

11/25/23, 9:10 PM

Confirming tomorrow. Good to go on my end.

I am thinking of staying the night tomorrow to roll into sales meeting Monday morning, Wilfried drop by, Brad Knowles meeting, and two others im waiting on confirming for both in Cape Coral

Still good on your end?

I'm good to go for tomorrow at 11 but I'm tied up in the afternoon tomorrow. Do want to do our meeting on Monday instead if you'll be down here anyway?

I'm trying to get an hour with Rick tomorrow too.

And either way, if you're free early evening tomorrow, is that doable for a chunk of time instead of 11am? Just to know while I plan

I'd prefer to get some undistracted time on a Sunday 1:1 with you to review the 30-60-90, then wake up down there Monday morning vs that early drive.

For Monday, I am hitting the road right when the sales meeting ends and won't have time for a detailed discussion in person once the sales meeting ends Monday

I've got some hs baseball friends coming over for the afternoon games tomorrow that I haven't seen in forever so the evening isn't open for me. I had our 11 on the calendar so I planned this for 3 assuming that would give us up to 4hr. A time tomorrow before 3 for me works but if making two trips is not ideal my Monday is flexible

Ok I'll have a text to you early in morning. Melissa and I have a doc appointment late afternoon monday I think she wants to postpone so I'll talk to her when she's back tonight as that would solve it. If not, I'll be there tomorrow 11am

Appreciate it.

Okay let me know as soon as you can, since I can't drive I have to plan my days out and it'll impact my morning plan and gym if we are shifting

Ok I will

Actually let's just do it Monday if tomorrow is going to be in flux. I planned around 11 tomorrow and don't want to be hanging in limbo 13hr before

Let's just keep 11am I want to have the meeting tomorrow

I'll make it work. That cool?

Yep 11 tomorrow works

11/26/23, 10:50 AM

11:20 eta but stopping for gas soon. Apologies a bit behind so likely 11:30

Sounds good

11/27/23, 8:11 AM

I'm working on changes to share but not by 830am. I have no important updates worth you time this morning since yesterday but will share soon

Okay sounds good, do you want to grab time this afternoon or not that soon?

We have a doc appointment I can't avoid I'd like to schedule time tomorrow

Tomorrow works

Report created "Recurring Monthly Report for Derek "

Are you joining the morning sales meeting?

11/29/23, 8:28 AM

Hey are we doing the morning call? I was thinking it was off because of your drive but were you just saying you wanted to take it from the car

Sorry, just saw this. My alarm went off for the call but totally fine. We talked a ton and you know exactly what I'm doing. I'm heading south with a stack of proposals

Liked "Sorry, just saw this. My alarm went off for the ca..."

Rick just advised that I stick to my original plan with my day of proposal deliveries and drop offs. He just texted me that today's install is not a good fit for neighborhood activation so I will stick to my plan. I was thinking the same as I looked at Google Earth last night

Just an FYI so you're not wondering

Sounds good

Does that mean not to be on the lookout for a text from Brad

Rick was very adamant that inviting Brad was a bad idea, and we should never invite a prospect to an install

Liked "Rick was very adamant that inviting Brad was a bad..."

11/29/23, 10:54 AM

Walking into Hanke's soon. Rick said you were working on a Cape Coral connection to do the main service panel and sub-panel swap. Do you have a timeframe on that?

11/29/23, 6:56 PM

Today:

- two in-home meetings today.
- Both are qualified but unfortunately not ready to move on Solar in December.
- Both are high likelihood to be genuine proposals in Q1.
- Both match the needs for Rick's boiler plate \$25k, 5.2kw with batteies which I pitched very well
- one was from Angie's lead. one was a resurfaced mailer lead from the first batch
- Dropped off another three pre-proposals at homes, but didn't meet them
- Two more to drop off in Gulfport tonight
- 7/10 complete for Rick's goal this week
- 7/25 for my goal this week (newly added goal)
- Driving home now to execute digital parts of plan

11/30/23, 4:59 PM

please give me 5 min. Joining 5:05

Liked "please give me 5 min. Joining 5:05"

12/1/23, 9:50 AM

Attachment stored in iCloud:
Screenshot 2023-12-01 at 9.48.48 AM.jpeg (Image)

I'll be in the office soon to see where this pricing request puts us to present it to you and Rick for approval but here is the Brad deal I was working on. Ready to sign and close tho

Awesome! Can you flip me the Brad proposal please

The latest I have is from 11/8

Emailing in a few. His request stretches us so your call but some context I'll need add when we speak. I'll be in the office by 11am and can talk then

Liked "Emailing in a few. His request stretches us so you..."

Shared a good drive folder

Thanks!

What type of roof is Brad?

Brand new shingle

Oh perfect thought it was tile. Rick is taking a look right now

Just called to confirm. Brand new shingle. I was 99.9% but now 100

Perfect will let you know as soon as I hear

Ok im in office so I'm available

12/1/23, 1:13 PM

Just spoke to him and going to swing over on Sunday

12/1/23, 4:21 PM

Let's talk Sunday before you go to Brad's. I'm thinking through a few things that I didn't cover today. You should be aware so you're not on the spot and unaware if it comes up

I'm free anytime but definitely 15 minutes before you go in

Okay sounds good!

11am meeting on on Sunday, right?

Yep

OK I'll I'll grab you at 10 AM or so

Thanks again for that and all the convo today

Lets shoot for like 945, I've got a haircut at 10 or even tomorrow

Absolutely and thank you, really value everything especially the approach you're taking to this

Liked "Absolutely and thank you, really value everything ..."

Set for 9:30am Sunday but I'll call your cell at 9:45 ish and before 10. Promised Melissa no work tomorrow

Perfect Sunday is great!

12/3/23, 9:26 AM

Mind if we start at 935? Apologies just got the notification and I was thinking it was 945

12/3/23, 2:17 PM

Very curious of any update you have from meeting with Brad

He has solar on the large south roof but is okay with a redesign that maximizes the space on the smaller south roof

So the pool solar is in fact there on the southern facing

Ok well we can talk more about it tomorrow just want to get the download and bring to finish. Please let me do the finalizing efforts

12/4/23, 8:29 AM

Morning! I'm free at 830am if you'd like catch up. I see no sales meeting either so I will proceed in my role no issue. Would like to discuss a few things today and the Brad Knowles meeting yesterday. Free when you are today.

Morning! Want to connect at 930? The sales meeting today is canceled, I shot an email over this morning

Yep saw that. 930 works. I'll send invite

Liked "Yep saw that. 930 works. I'll send invite "

Can you send me the picture of the sub panel and main service at Hankie?

Sure one second

12/4/23, 10:55 AM

Didn't intend to send that long write up here. I'll send it over email and you can review a recommendation that I'll leave

12/4/23, 2:34 PM

Liked "Didn't intend to send that long write up here. I'll..."

12/12/23, 1:59 PM

Jeff just had an emergency and can't join the call in one min. I can field the questions and circle with Jeff on anything that I don't know

Just wanted to flag before incase you want to cancel since I know you're incurring a cost

Ok joining . Please mention again on call

Delivered