

iMessage  
10/6/22, 1:36 PM

Hi Val! Thinking of you today. How are you? How's life? How the grand kiddos?

Steve... you are the absolute sweetest!! I am doing really well!! Just enjoying a little down time while also looking for jobs. I feel peaceful in my soul and know everything will work out! My grand kiddos are the freaking cutest and I love having them around... it puts a smile on my face every day! How are you and your cute wife? How's bidness at Paylt??

All gravy on my end. Lots of detail behind answering all that so I'll start with the wife. She's rocking it and in Florida for a girls weekend. I have the place to myself for a week and plan to golf and taking off work tomorrow. I have a couple offers I'm exploring.

Can we talk over weekend or maybe next week? I would like to run something by you if I could

Absolutely!! Let me know when you are available!! I feel flattered you'd like to run something by me! 😊 So happy your wife is rocking it with her friends in Florida!! Enjoy your downtime this weekend! Let me know when you want to chat!

10/6/22, 3:46 PM

Ok I will reach out soon with some times thanks!

10/6/22, 6:49 PM

Hey! Are you free now by chance or this evening?

10/6/22, 11:08 PM

So sorry, Steve... I went to visit my Dad and forgot my phone. Ping me again when you have more free time!

10/7/22, 7:02 AM

How about tomorrow Saturday around 1pm or 4pm est ??

10/7/22, 10:13 AM

Hey Steve... I just decided I'm going to hang at my sister's cabin for the weekend. There is no cell service so we won't be able to connect until Monday... hope that's okay?? Go kick some golf ass today!

10/7/22, 2:27 PM

Yes I'll be at nascio so very easy to take a call . Text me Monday please I have something cool to chat about !

I absolutely will!!!

10/9/22, 11:30 AM

Hi Val, I'm about to hop on a flight to NASCIO and will be at the conference tomorrow but very much want to talk as soon as you're available. Please let me know when you can hop on a 20 min call!

10/10/22, 9:59 AM

Hey Steve.... I'm available anytime after 10am (MT). Let me know what works in your end!

Ok I will call you at 2:30pm MT / 4:30pm EST

Does that work?

Perfect!!! Talk to you then!! Have a great day! 😊

10/10/22, 4:26 PM

What is the best email for you?

And can you join a google meet in 5 minutes ?

Valeri.Tate@gmail.com

Are you sending me a link via email?

I just sent it

Refresh gmail maybe

I sent from stephen.boerner@gmail.com

Ohh wait

I had a typo in your email

That was my next question!

Ok resent

10/10/22, 9:01 PM

Just wanted to say it was such a refreshing conversation today and I'm very excited to work with you.

Let's set up a time for Thursday or Friday this week and let's get started on Monday officially.

And thank you for being ready to take on something new and unknown. Needed to hear today that that was exciting as I thought it might be for you so let's freakin kill it together. Very much NEED you for this.

Have a great night and a good week. I'll send the job description tomorrow and we will formalize the contract before end of week to make it official

Sounds perfect!!! I'm so excited!! Thanks, Steve!

10/11/22, 6:19 PM

Hi Val, working on some things to get you started and I'll formalize the offer letter / job description soon I'm flying back from nascio.

What kind of computer do you have? Did you have to send back your Paylt laptop I'm assuming? Do you have a personal laptop?

I do have my own Mac laptop, monitors, etc... a nice little home office. I also negotiated with Paylt to keep my Paylt laptop until I get a new job... so I'm covered! How was NASCIO?

Honestly a waste of money but I used to time to work so I got a lot done

I have always thought that event was way too much hype and way too much \$\$\$ but it seems to be the flagship event, according to some 😊 Glad you were able to get some schtuff done!

Text message  
10/11/22, 6:59 PM

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iMessage  
10/11/22, 7:16 PM

If you get an email from a company called Motion, that was triggered by me nothing to do for now I'll let you know. I'm trialing a software I found to help us see everything in one platform since I have to find a way to merge multiple inboxes and calendars in an easier way just fyi !



10/12/22, 11:58 AM

Hi Steve! Hey... will you please send me the doc you put together and shared with me in our meeting? I want to think through how best we can work together and see if I have thoughts to add. It doesn't need to be the final doc! Thanks and hope you have a great day!!

Yes sending in 10-15 min

Sent

Perfect! Thank you!

10/13/22, 10:21 AM

Hi Val, can we chat tomorrow ahead of starting on Monday? When are you free?

I'm available anytime between 9am - 12pm.

Let me know what works on your end!

Mountain time correct?

10/13/22, 12:46 PM

Yes

10/13/22, 2:13 PM

Invite sent talk tomorrow



10/16/22, 6:51 PM

Val, I'm going to have to bail on using motion for our project management. Tough decision since I put tons of time into it but the main issue is the iPhone app is terrible. It's useless and causes issues I'll explain later. I see we are talking tomorrow afternoon so we can talk about how we best organize together. I'm thinking of trying Asana.

Either way we have to issue a refund request for motion as well as another platform I tried called Shift that I also didn't like. Both need refund requests tomorrow. We can discuss

That sucks... so sorry! Asana is decent but I'm not sure about the app. I can look into some options as well. We can discuss tomorrow.

On a separate note... do you still need flights booked for this week (a task you assigned to me but we need to figure out a good payment method. I'm happy to purchase with my AMEX if you don't mind sending a reimbursement via Venmo or something. Mostly I want to make sure your flights get booked!

Ok I may try and bail on the Grand Rapids trip. I'll know by the morning.

Scratch Asana, can you look into Monday .com ?

So no flights as of now and we can cancel motion and Shift after our call tomorrow

10/16/22, 9:07 PM



10/17/22, 1:23 PM

Just ignore any notifications you may be getting from Monday.com... just doing a little testing and exploring!

Awesome thank you

10/20/22, 4:28 PM

Hey are you free to chat tomorrow

I surely am! Either at 11-12 or after 3pm your time (EST)

Or we can chat later this evening as well.

10/21/22, 10:42 AM

Hey Steve... let me know what time works for you today... I think I should be available after 2pm EST (I do have a 30 min appt from 4:30-5 EST)

10/21/22, 1:43 PM

Ok how about 4pm est give me a call?

Sounds good! Talk to you then.

10/28/22, 12:34 PM

Hey Steve... hope you've had a good, productive week!! Just want you to know that I've been researching more about SureBright, it's competitors & potential customers so we can create a great GTM strategy when the time is right. I've not done so well testing out Monday.com but I'll focus on that next. I also want to give you a little heads-up that I'll be visiting my sister in Austin (along with 4 of my other sisters!) beginning Wed (Nov 2) returning the following Tuesday (Nov 8). Anyway... hope you have a fabulous weekend... and know that I'm thinking about a lot of different things behind the scene!!

Amazing update thank you! SureBright said I'd have an offer letter end of next week and probably a Nov 14th start date

Sounds perfect!

11/11/22, 12:30 PM

Hi Steve! Hope you and your darling wife are well! I went to Austin to visit my sis and brought back COVID.... So I'm a little down and out but starting to feel much better. Let's connect Monday morning or early next week sometime, when you have a few extra secs. Please don't feel any pressure if you're not quite ready.. we'll figure out a good system with a little trial & error! Have a great weekend!!

11/11/22, 3:42 PM

Text me Monday morning! I was down and sick as well. Probably Covid again. Ugh. Glad we are both better.

11/14/22, 4:08 PM

Hey Steve.... I had a grandkid emergency and have been at the hospital all day. I think all is well but my day is shot. Are you feeling any better? Are you ready to chat? If so, let me know when you have availability this week and I'll schedule a meeting!

11/14/22, 5:54 PM

Please please fam first don't even think about me.

All good I swear I'm still under weather and traveling ALL week ugh haha

All the best with the fam

11/14/22, 9:13 PM



11/17/22, 3:32 PM

Hey Steve... I haven't forgotten about you... I also know you're traveling this week. You let me know when you're ready to move forward (and please don't feel pressured by me... I've actually really been enjoying not working and have been focusing on some professional & personal growth during this down time! 😊)  
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11/17/22, 5:21 PM

You're the best Val. So happy to hear that. I have delays I'll explain so I have nothing urgent and we can talk next week or even after thanksgiving. If we don't chat, enjoy your family time

Delivered

That sounds perfect! You enjoy a wonderful Thanksgiving!!