📝 Notes

Jul 10, 2025

## Merchant Onboarding UX Interviews (Eric Brittingham)

Invited [Eric Brittingham](mailto:ebrittingham@versatilets.com) [Tayler Ramsay](mailto:tramsay@versatilets.com)

Attachments [Merchant Onboarding UX Interviews (Eric Brittingham)](https://www.google.com/calendar/event?eid=djdtN2hzM25jN3FlbzJsam1wamFyMzA3Zm8gdHJhbXNheUB2ZXJzYXRpbGV0cy5jb20)

Meeting records [Transcript](?tab=t.59fbthujieo3) [Recording](https://drive.google.com/file/d/12XE9n9tMDkVtWVz41Ucxs_hN7mH6KFty/view?usp=drive_web)

### Summary

Tayler Ramsay, Eric Brittingham, and Martha Alcantelado met to discuss the merchant onboarding process. Eric described their current onboarding workflow, highlighting bottlenecks such as collecting user and location information, automating lender introductions, and managing multiple programs with lending partners. Eric suggested that streamlining data input for user and location information and automating training processes would greatly improve the current workflow.

### Details

* **Meeting Context and Introductions** Tayler Ramsay initiated the meeting by welcoming Eric Brittingham and Martha Alcantelado, who joined later ([00:00:00](#_b9d9driv4azm)). Tayler explained that the goal is to transform the current merchant onboarding process, which involves many individuals, into a platform with richer data, better task management, and automated tasks ([00:04:20](#_hd0cx71klno)).
* **Eric's Role and Onboarding Experience** Eric described their role as Director of Elective Medical Sales, a position they have held for almost two years. Tayler asked Eric to describe a recent onboarding process from initial contact to going live, focusing on their experiences rather than the entire process ([00:05:15](#_9mugnkfv9ze)).
* **Lead Prospecting and Salesforce Usage** Eric explained that they either prospect leads or receive them, then input them into Salesforce or other trackers. They typically start with a demo, which they or a lender sets up ([00:06:20](#_z6ikvbft4vac)). Eric noted that they often use Salesforce to document information from initial meetings, sometimes updating it later from other charts ([00:07:35](#_phavonsz9sgr)). They find a grid-like view in Salesforce helpful for updating statuses and next steps ([00:08:50](#_z8q5qf2ybehm)).
* **Merchant Onboarding Stages** Eric clarified that the merchant has not yet signed up during the lead tracking stage; at this point, the lead is converted to an opportunity in their system, usually after a demo ([00:08:50](#_z8q5qf2ybehm)). This is when data collection begins, focusing on annual financing volume and other lenders the merchant uses or is interested in ([00:09:58](#_m0tkaq3euti)).
* **Contracting and User/Locations Guide** Eric explained that once a merchant is ready to proceed, they send a contract, particularly a white-label environment contract for Synchrony leads, which is a simple e-signature form. After the contract is signed, Eric sends a "users and locations guide" for the merchant to fill out, which helps their team set up the portal ([00:11:15](#_txfbx843qjub)). Eric created this guide in Excel to simplify data collection, including user details, positions, and access levels, and they expressed interest in a platform feature that could streamline this communication ([00:12:24](#_nuslekvpdui5)).
* **Lender Introductions and Logic** Eric explained that they often make introduction emails to subprime lenders on the platform, which they wish could be automated ([00:16:11](#_1x4cydwwrhhy)). They follow up with merchants after they have vetted and chosen lenders to update Salesforce with the lender cascade, including the order and any necessary logic, such as routing requests based on specific amounts ([00:17:13](#_unuyzok9nva4)). Eric identified lender introductions and the complexity of managing multiple programs under one lending partner as the biggest bottlenecks ([00:18:21](#_pgfordrzlq0x)).
* **Users and Locations Guide Bottleneck** Eric also identified getting the "users and locations guide" filled out as another bottleneck, mentioning that they added instructions and guidance to make it less confusing ([00:20:43](#_ynjnfcsw45ki)). They noted that communication is typically done via email ([00:21:45](#_790yc0hddp0e)).
* **Workflow Streamlining Wishes** When asked about a step they would remove from their workflow, Eric stated that streamlining the user and locations information input and taking it off their plate would be beneficial ([00:22:50](#_k3c59ow512e1)).
* **Card Sorting Activity - Stage Definitions** Tayler conducted a card sorting activity using FigJam, asking Eric to categorize terms into four groups: Stage (where the merchant is in the process), Exceptions and Issues (time-sensitive blockers or bottlenecks), Actions and Tools (hands-on tasks), and Reporting and Meta (reports, audit history, logs) ([00:25:59](#_rm1rmjzeblv9)).
* **Card Sorting Activity - Categorizations** Eric categorized terms, placing "white label portal" and "merchant go" under actions and tools because setup is required ([00:28:05](#_ihd9nciicz7o)). They put "pipeline" under stage as it indicates the merchant's process status. "Prime near prime subprime" was placed under reporting because it's a typical reporting breakout, and "lender selection" was placed under exceptions due to common issues with competing lenders ([00:29:25](#_t9liui649098)). "QA check" was categorized under actions and tools, with Eric emphasizing the need for more robust QA processes, especially for new platforms ([00:32:43](#_y819fi8wl23b)). Eric placed "credentials" under action items as they are requested, and "versatile admin" under exceptions/issues due to its association with support ([00:35:15](#_83ndmorwcde)). Other terms like "document upload," "ticket," "config template," "go live checklist," "status badge," and "bulk upload" were sorted into their respective categories, with Eric explaining their rationale for each ([00:36:42](#_h7hhvnbidvqa)) ([00:41:12](#_n0v76u767xiy)).
* **Complicated Onboarding Cases** Eric described a complicated onboarding experience involving a merchant with a complex hierarchy, which led them to expand the "user and locations guide" to better handle such cases ([00:43:07](#_uftlpmdvqo6k)). Another challenge was the lengthy contract finalization with a lender for a large organization, which took almost two months, coupled with miscommunications regarding pricing programs that led to additional headaches ([00:44:30](#_c33pr7huec6l)). Eric noted that this particular client, part of the white label platform, had not yet been implemented, highlighting the ongoing effort of building the platform while onboarding clients ([00:45:47](#_st803qsskdzj)).
* **Smooth Onboarding Case** Eric found the onboarding of Hartland surprisingly smooth, attributing it to the attention of a project manager and greater organizational effort in tracking development issues. For Hartland, they quickly received the "users and locations guide," and their IT teams established an automated daily list for new locations ([00:46:35](#_3eco7idwh4av)). Hartland also handled their own training for the most part, reducing bottlenecks related to training resources and availability ([00:47:40](#_43f5atgjnzqk)).
* **Desired Platform Training and Automation** Eric expressed a desire for training or a cheat sheet that would clearly outline the actions they need to take and how to ensure merchants input information correctly. They also mentioned that they remain involved in onboarding, especially in solutioning and introducing the training team ([00:49:59](#_u190ml9ffj8)). Eric would appreciate a repeatable training template, ideally automated with training videos and a way to hold people accountable for watching them, possibly through a gamified system within the portal ([00:50:58](#_1dg4gcha98l9)).
* **Meeting Conclusion** Tayler thanked Eric for their time and valuable information, assuring them that their input would significantly impact the product's development and that they would be involved in reviewing future wireframes and templates ([00:53:17](#_xm8g1si0wkp)).

### Suggested next steps

* Tayler Ramsay will share wireframes and templates with a small group, including Eric Brittingham.

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📖 Transcript

Jul 10, 2025

## Merchant Onboarding UX Interviews (Eric Brittingham) - Transcript

### 00:00:00

**Tayler Ramsay:** Hey, Eric.  
**Eric Brittingham:** Hey, Taylor. How are you?  
**Tayler Ramsay:** I'm doing well. How are you?  
**Eric Brittingham:** Doing well. Doing  
**Tayler Ramsay:** That's  
**Eric Brittingham:** well.  
**Tayler Ramsay:** That's good.  
**Eric Brittingham:** Hopefully, I can help a little bit. I I don't I  
**Tayler Ramsay:** Oh,  
**Eric Brittingham:** don't even know if I  
**Tayler Ramsay:** I'm sorry. We have one more person joining us. Her name's Martha. I just have to allow her. Go ahead.  
**Eric Brittingham:** Yeah. Uh hopefully with what uh little bit of onboarding experience I have, I can help out a bit  
**Tayler Ramsay:** I guarantee you'll help out tremendously because um Chris said the same thing and it was great. So pretty much I just let us set the context. We're um we're building so we're trying to take the process that everyone I'm so sorry. Hold on. This is  
**Eric Brittingham:** north.  
**Tayler Ramsay:** what I did. Hey you there. Did I let you in? Okay, good. This is Martha.  
 

### 00:04:20

**Tayler Ramsay:** Martha, this is Eric.  
**Eric Brittingham:** How's it going?  
**Martha Alcantelado:** Glory.  
**Eric Brittingham:** Nice to meet you.  
**Tayler Ramsay:** She works with the KISS team. They're a contract team that help us QA and do some business stuff, business analyst. She's um assisting me on the research study. So, she's just here for the ride. Um she's great.  
**Eric Brittingham:** Sounds  
**Tayler Ramsay:** So,  
**Eric Brittingham:** good.  
**Martha Alcantelado:** Thank  
**Tayler Ramsay:** cool. So, what we're doing is we're trying to take the process of onboarding a new merchant. That process touches a lot of different people in the company. We want to take that process and make it into a platform that allows us to like um have richer data, better task management, automate tasks, better insight into what's going on at any given point with an onboarding. So, um we're just going to go through this. It should probably be less than 60 minutes, but I'll just ask you some questions and just kind of listen to you explain your experiences. Um,  
**Eric Brittingham:** Yep.  
 

### 00:05:15

**Tayler Ramsay:** what is your role and how long uh have you been doing it here?  
**Eric Brittingham:** I'm the director of elective uh medical sales. So, I've been in that role for um almost two years coming up.  
**Tayler Ramsay:** Great. Great. Um, can you walk me through the last onboarding from like the first email to go live just and I'm not saying that you were a part of all of it, but just your experiences with  
**Eric Brittingham:** Yeah. Um it's a good question. Some of ours have been like special cases.  
**Tayler Ramsay:** those are  
**Eric Brittingham:** Uh  
**Tayler Ramsay:** the ones we would love to hear about. So,  
**Eric Brittingham:** and then in terms of like first email, are you talking about first email is in like contracting or even lead prospecting or  
**Tayler Ramsay:** Whatever it is for you, that's all I want to know. So, for your for I guess it would be the lead prospecting for you. I get what you're saying. Yeah,  
**Eric Brittingham:** Yeah.  
**Tayler Ramsay:** let's let's start with that.  
**Eric Brittingham:** Okay.  
 

### 00:06:20

**Eric Brittingham:** So, um, either I'm prospecting a lead or I receive a lead, input it into Salesforce or we have other trackers as well. Sometimes I'll update those first and then update Salesforce like once at the end of the week or something like that. Um, and then I usually, you know, start out with a demo.  
**Tayler Ramsay:** Can you So, who sets that demo up for you?  
**Eric Brittingham:** Uh, either myself or if I'm working on this with a lender, it'll be the lender. Um, so one or the other.  
**Tayler Ramsay:** So, at this point, you've already been in contact with the our partner, the lender. So, just  
**Eric Brittingham:** Sometimes.  
**Tayler Ramsay:** so you Okay. Okay.  
**Eric Brittingham:** Sometimes  
**Tayler Ramsay:** So, just so you know, we're hoping to have the lender as part of pro the the um product. So, that's the goal, just so you know, is to get them involved as well.  
**Eric Brittingham:** got  
**Tayler Ramsay:** But go ahead.  
**Eric Brittingham:** you. So maybe I'll look at this more from a synchrony white label perspective, which is how majority of our our leads are now coming to us, referred to by the uh the uh Care Credit team.  
 

### 00:07:35

**Eric Brittingham:** Um, so they'll contact me, they'll let me know they have a lead, they'll either set up an intro intro meeting or we'll go right into a demo. Uh, I will try and collect some information on that first uh first meeting. I typically because it's the Care Credit Reps meeting, I try not to get into nitty-gritty right now like, well, how much are you financing? What other lenders are you using? Um  
**Tayler Ramsay:** Can I ask you where do you put that documentation?  
**Eric Brittingham:** um typically I'll put it into Salesforce  
**Tayler Ramsay:** Cool.  
**Eric Brittingham:** or  
**Tayler Ramsay:** Do you  
**Eric Brittingham:** I'll  
**Tayler Ramsay:** use  
**Eric Brittingham:** notate  
**Tayler Ramsay:** any  
**Eric Brittingham:** it  
**Tayler Ramsay:** tools?  
**Eric Brittingham:** on like some chart that I'll update into Salesforce later on.  
**Tayler Ramsay:** No, that's great. So, one one of the things I'll ask you is like do you have any like shortcuts or like workarounds that you use in your workflow that makes it easier for you?  
**Eric Brittingham:** Um, no.  
**Tayler Ramsay:** Okay,  
**Eric Brittingham:** Uh,  
**Tayler Ramsay:** that's  
**Eric Brittingham:** well, I will say something that works for me is, and I need to mess around with it a little bit more, updating the view within Salesforce to have a uh, gridlike view.  
 

### 00:08:50

**Eric Brittingham:** So, I can just go line by line or account by account updating like, hey, here's next steps, next steps, next steps for this one. Um, it would be nice to put in like for to have some sort of view like that and be able to put in what is your new note or like latest note, latest note, latest note like that.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** That would be nice. Um,  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** so that would be something that would be helpful. Um, from there I can update I think like everything, the stage that they're at, uh, where we're at. where we're at in the process. Um there's  
**Tayler Ramsay:** Now,  
**Eric Brittingham:** certain  
**Tayler Ramsay:** at this point in the process, is this before the merchant has signed up? Are you still tracking down the lead? Okay.  
**Eric Brittingham:** so merchant has not signed up. Uh I probably at that point have converted that lead in our system to an opportunity. Um, usually once we get a demo, we convert it to an opportunity because there's a higher likelihood that it's going to move forward at that point.  
 

### 00:09:58

**Eric Brittingham:** And that's where we really start collecting like the data. Um, well, that's why I try to collect the data at the demo or in some instances, Care Credit provides us some of the data that we're looking for. We're looking for uh how much financing volume they do on an annual basis. Um, and then that's probably the biggest part. Other than that, what other lenders are they using or what lenders are they interested in using  
**Tayler Ramsay:** Okay. Okay, that's great. Now, so now let's say you got them after we've actually signed they're say they've done their part. Now the merchant has went on. We're going to so the goal is we're going to revamp the the application that the merchant is signing up on, make it a lot more streamlined, a lot faster. But so now what we're going to focus on here more is the admin part of it. So while that process is going on, do you have any more inter like I would I'm making an assumption here, but I would assume after the merchant signs up, you're probably more at a readonly basis like you just want to know what's going on now once they're signed up and and and then the process starts of onboarding them onto our actual system.  
 

### 00:11:15

**Tayler Ramsay:** Is that would that be correct or do you  
**Eric Brittingham:** Uh  
**Tayler Ramsay:** do  
**Eric Brittingham:** yeah, I guess I'm not actively participating. Oh, so here I I'll go through um so let's say they're ready to move forward. I  
**Tayler Ramsay:** Yes.  
**Eric Brittingham:** send them over a contract depending on like how they were introduced to us. For the Synchrony white label purposes, I send over a white label environment contract because it doesn't need to have pricing on it. Um, and it's specific to how majority of the leads are coming in, which so that is a very simple agree to terms and conditions and e signature form.  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** Once we get that that essentially uh solidifies our relationship saying we can work with their sensitive data  
**Tayler Ramsay:** Got it.  
**Eric Brittingham:** um and they have agreed to work with us and then I will send them or typically at the same time or before that it it all depends on the relationship and where we're at. I will send over something called the users and locations guide  
**Tayler Ramsay:** Okay.  
 

### 00:12:24

**Eric Brittingham:** which if you want I can share it with you on this call.  
**Tayler Ramsay:** Yeah, that'd  
**Eric Brittingham:** I  
**Tayler Ramsay:** be  
**Eric Brittingham:** was  
**Tayler Ramsay:** great.  
**Eric Brittingham:** just tinkering with it beforehand. So, this is something for them to fill out so we can set up start getting our teams to set up the portal on our end. Um,  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** so it has like user first name, last name. I have instructions on how to fill it out. um user first name, last name, the position that they're at, uh the user email, uh the office phone number, if there's a unique location identifier. Sometimes they do speed dial. Sometimes they have some sort of like code in their system. Um location name, physical address. And then if they want to include the hierarchy, they can do that for like upper level management grouping purposes.  
**Tayler Ramsay:** This is really good. Did you put this together?  
**Eric Brittingham:** Yes.  
**Tayler Ramsay:** This is good, dude.  
**Eric Brittingham:** And then I also created so they can they don't need to write in what level of access they want for each position.  
 

### 00:13:46

**Eric Brittingham:** They can just put in a position title once and type in what functionality they want for that position.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** And then also I made it a little bit separate but just for like corporate access and then what functionality they'd want for each of those.  
**Tayler Ramsay:** This is great. If we could we could let me ask you this. Would you like this as a tool that you had access to at maybe the platform? Would that make sense?  
**Eric Brittingham:** Um, what what do you mean?  
**Tayler Ramsay:** Yeah, I guess that's that's that's so you've built this in Excel. if we were able to build an app that made it so like you could just log into a a portal and have this as as a way that you can then communicate it with other people very easily. Would that be something like a feature that made sense for you?  
**Eric Brittingham:** Um, yeah,  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** potentially. I just don't know how the uh I'm trying to envision how the communication on updates and whatnot would go through.  
 

### 00:15:03

**Eric Brittingham:** Um,  
**Tayler Ramsay:** talk a little bit more about that. Sorry, that is  
**Eric Brittingham:** well, currently, so I just send them this guy. I I I built it, but I just send it to them. They send it back to me filled out. Hopefully I send it over to Amanda and her team and then they will, you know, determine if they need more information or or maybe ask some follow-up clarifying questions. I don't know what exactly else they would need to know. Um, but typically once we start typically we don't know exactly what solution we're moving forward yet. And what I mean by that is what the exact lender lineup is in this part.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** Um,  
**Tayler Ramsay:** Yeah. And then can I ask you a question real quick? Is that where Amanda will start reaching out to our partners?  
**Eric Brittingham:** no, no, that's still uh it's still kind of in my my  
**Tayler Ramsay:** Oh,  
**Eric Brittingham:** course.  
**Tayler Ramsay:** okay.  
**Eric Brittingham:** So I will actually like during the demo or whatnot, we'll discuss how our platform works.  
 

### 00:16:11

**Eric Brittingham:** There's a lot of instances where they don't have relationships with some of the subprime lenders on our platform. So, I'll have to go and make an an introduction email to each each one of them. It would be nice if we could have that automated to be honest.  
**Tayler Ramsay:** That's  
**Eric Brittingham:** Uh  
**Tayler Ramsay:** what this is about, man. That's That sounds great. Like that's exactly what this is about. Go ahead. Keep going. This is great.  
**Eric Brittingham:** um so then they usually go and they'll set up their their meetings with the lenders. They'll vet them out, vet their plans because I don't necessarily need to be a part of the discussion about like are these MDRs or the these fees are they worth it for our organization or not. Um, I'll follow up with them once they've kind of vetted out or at least have started to pick one. Um, I try to narrow them down like, "Hey, once you find one you want to work with, let's start there and then we can always start to build out from there or change things."  
 

### 00:17:13

**Tayler Ramsay:** Right.  
**Eric Brittingham:** Um, so at that point, I will update Salesforce once I figure out what the lender cascade is.  
**Tayler Ramsay:** Right.  
**Eric Brittingham:** I will input if there's other lenders uh or what the other lenders are, what the order is and what the if there's any logic that needs to be built in.  
**Tayler Ramsay:** Okay. Can you talk a little bit about that?  
**Eric Brittingham:** So for some of the lenders, they have programs that are for specifically larger cases. So, they don't want to participate unless it's above $10,000.  
**Tayler Ramsay:** Understood.  
**Eric Brittingham:** So, I'll have to input that logic to say like second look, if it's declined with this one, but it's above a 10K request, it goes to this lender next. If it's below a 10K request, it goes to that lender next.  
**Tayler Ramsay:** Okay. Now, is this like this sounds like it's more of like it's not a one and done. It's a back and forth discussion over time.  
**Eric Brittingham:** Yeah. Yep.  
**Tayler Ramsay:** Yeah. Yeah.  
**Eric Brittingham:** Yeah.  
**Tayler Ramsay:** Okay.  
 

### 00:18:21

**Eric Brittingham:** It's uh  
**Tayler Ramsay:** So, where do you see that? Usually, I guess you just answer. My next question is where do you see the process usually slowing down for you? It sounds like maybe that interaction is is kind of a bottleneck or would you?  
**Eric Brittingham:** uh lender introductions. Um getting those out the door. And sometimes when they work with a lender, so for example, some of our partners and when I say partners, not the merchant but lending partner,  
**Tayler Ramsay:** Yep. Yep.  
**Eric Brittingham:** uh HFD would be a good example. They have four or they have multiple programs under the HFD umbrella that someone could participate in. In their system, they in their system, they select what program that they're going to be applying for before sending out the link. But in our system, we need to accommodate for it automatically. So,  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** we need to automate that system to be able to route to which program it's going to go.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** Um, so that can be a little bit of a longer discussion because there's certain instances where they have to go back to the lender and say, "Hey, you want to use us as a second look, but you're currently signed up on a first look program.  
 

### 00:19:46

**Eric Brittingham:** We have to renegotiate pricing or we don't want to do that." So, that's probably my biggest bottleneck  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** right now.  
**Tayler Ramsay:** Now, does that and then and forgive me if I I've missed that, but is that they haven't been underwritten yet, right? They're still just talking about getting with different partners, different lenders. Like, they haven't  
**Eric Brittingham:** uh  
**Tayler Ramsay:** been approved at this point, I guess, is what I'm asking.  
**Eric Brittingham:** approved by the lender.  
**Tayler Ramsay:** Right. Yeah, they haven't been underwritten.  
**Eric Brittingham:** In  
**Tayler Ramsay:** They haven't  
**Eric Brittingham:** some cases they haven't. In some cases they already have an established account.  
**Tayler Ramsay:** Okay. Okay, that's good  
**Eric Brittingham:** So  
**Tayler Ramsay:** to  
**Eric Brittingham:** this  
**Tayler Ramsay:** know.  
**Eric Brittingham:** would be like an a case where hey you know Care Credit introduced us they already have a relationship with HFD we find out the relationship with HFD is based on first look applications as well or that's the program that they're put in. Um so that can be probably one of my biggest bottlenecks  
 

### 00:20:43

**Tayler Ramsay:** Yeah,  
**Eric Brittingham:** at the at the current state.  
**Tayler Ramsay:** got it.  
**Eric Brittingham:** Um  
**Tayler Ramsay:** Okay. No, that's good. Uh, we  
**Eric Brittingham:** uh  
**Tayler Ramsay:** want to cut you off. Go ahead.  
**Eric Brittingham:** no no I would say uh other than that so getting the users and locations guide uh filled out I I just updated it because I wanted to make sure that there were instructions and some of the areas were uh less confusing  
**Tayler Ramsay:** Mhm.  
**Eric Brittingham:** and more like I provided a little bit more guidance during it and why they needed to fill out certain certain areas. Um, that can be a bottleneck as well. We've sent some out and haven't gotten some back and they need to fill out only like 20 20 or so locations.  
**Tayler Ramsay:** Now  
**Eric Brittingham:** I  
**Tayler Ramsay:** is that.  
**Eric Brittingham:** also include on this  
**Tayler Ramsay:** Sorry.  
**Eric Brittingham:** um I also include on this in the instructions some organizations already have their own table for their complete organization and all their users. So that's like instructions on uh number one under instructions.  
 

### 00:21:45

**Eric Brittingham:** If you  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** already if you have a table that already has this required information, you can send that to us. So  
**Tayler Ramsay:** And then do you communicate? I know this sounds is it always through email?  
**Eric Brittingham:** uh typically yes  
**Tayler Ramsay:** Okay. Um, tell me about can you walk me through the last time you had to chase a lender or a merchant down? Like just actually walk me through the last time you did it.  
**Eric Brittingham:** um chasing a lender a  
**Tayler Ramsay:** I  
**Eric Brittingham:** merchant.  
**Tayler Ramsay:** guess that's a weird word. So like the last  
**Eric Brittingham:** There's  
**Tayler Ramsay:** time  
**Eric Brittingham:** too  
**Tayler Ramsay:** you  
**Eric Brittingham:** many instances.  
**Tayler Ramsay:** can you just pick one? I mean just for historical just it'll help us with because we asked that same question to um  
**Eric Brittingham:** Uh yeah, I guess most recently just following up on a timeline um with with HFD to try and get a timeline on when they will deliver the mids to us for a specific merchant that uh both us and Care Credit have a lot of pressure to go live with.  
 

### 00:22:50

**Tayler Ramsay:** Okay. Okay. Um, this is so silly. If I had a magic wand to remove one step tomorrow, what would it be that you have to do? Like, if I could remove one of your steps in your task, in your workflow, what would it be? I know.  
**Eric Brittingham:** uh I mean the easiest thing would be if all the lenders played nice and I didn't need to go back and forth with well they want you to participate with this or they want that. Um, but if I guess if user and locations information could be streamlined and taken off my plate, that would be  
**Tayler Ramsay:** Great. Perfect answer. Um, all right. I sent you a link earlier in your email. It was to something called Fig Jam. You're going to have to log in. It's the company's web uh app, but it still makes you like log in. And what it is, it's um called a card sort. And it's all terms. Well, I'm going to wait till we actually before I explain it.  
 

### 00:24:04

**Tayler Ramsay:** Let me get it opened. And  
**Eric Brittingham:** Oh, do you want me to open it now?  
**Tayler Ramsay:** yeah, can you open it and then I'll share it on my screen.  
**Eric Brittingham:** Okay.  
**Tayler Ramsay:** You just need to be able because you'll be moving the cards around. You'll have like access to it.  
**Eric Brittingham:** Figma.  
**Tayler Ramsay:** Yeah. It would have came in an email.  
**Eric Brittingham:** It's a It's Figma, right? Yeah, that's what I  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** saw.  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** I was just in and  
**Tayler Ramsay:** Yeah. Now, it's going to make you do probably tell who you are, what your role is. It It really doesn't matter. Like, it's not like for It's just to get you into this  
**Eric Brittingham:** Uh, let's see. Collab.  
**Tayler Ramsay:** Uh yeah. Oh yeah.  
**Eric Brittingham:** All right.  
**Tayler Ramsay:** And then if you click on my init T, there's like a T and an E up in the corner.  
**Eric Brittingham:** Which corner?  
**Tayler Ramsay:** the right corner there's a button that says share.  
 

### 00:25:59

**Eric Brittingham:** Okay. You  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** want me to share?  
**Tayler Ramsay:** No, no. Just click the T and it'll bring you to where?  
**Eric Brittingham:** Okay.  
**Tayler Ramsay:** Yeah, it should say follow or something like that.  
**Eric Brittingham:** Let's see. Click to follow. Click to follow you.  
**Tayler Ramsay:** Yes, there you go. All right. Great. So, what this is is called card sorting activity. At the bottom here are four groups. one called stage, one called exception and issues, one called actions and tools, and one called reporting and meta. So when we say stage, we're talking about anything. So let me step back now. Up top are terms that we use within Versatile. They might like there's ones that say merchant, config, template, just different terms you're going to hear in this company. What I'd like you to do is click a card. You can drag these cards. Click a card. Drag it to the group that you think it makes most sense in. So now I'll explain the groups.  
 

### 00:27:01

**Tayler Ramsay:** Stage is anything that reflects the merchant where the merchant is in the process. So a great like I always say example that would be like pipeline. We call our pipeline you know when I say pipeline and versatile we mean like the process the whole pipeline. So that would make sense in in a stage. Exceptions and issues, that's anything that's like timesensitive or it might be a blocker or a bottleneck, that term relates to that. Actions and tools are hands-on tasks and configurations. So like when a man has to create a config, um reporting and meta is just what it says. It's like reports, audit history, logs, anything like that. So now what I'd like you to do is it doesn't matter, you don't have to do order, but pick a term and then drag it to this group you think it belongs. And while you're doing that, just kind of like talk out loud your your thought process on why you think it belongs there.  
**Eric Brittingham:** So I got kicked out a little bit.  
 

### 00:28:05

**Eric Brittingham:** Are you able to explain stage uh exception issues?  
**Tayler Ramsay:** Yes.  
**Eric Brittingham:** Um, again,  
**Tayler Ramsay:** Yeah, no problem. So the stage is where the merchant is in the process or the process as a whole. So just from beginning to from you know sign up to launch. Exceptions and issues are anything that's time sensitive, an error, um a blocker, a bottleneck. Actions and tools are hands-on tasks. So when we have Amanda com she created a config that's that would be an action and she probably used a tool to create that config. Uh reporting and meta is ex just reports logs audit history any kind of metadata. So if you can just take the term like I said and then just drag it and kind of talk out loud why you think it belongs there  
**Eric Brittingham:** Um,  
**Tayler Ramsay:** and there's no wrong answers at all. So,  
**Eric Brittingham:** hold on. uh white label portal under actions and tools  
**Tayler Ramsay:** okay,  
**Eric Brittingham:** because uh we'd need to get it set up in a white label environment.  
 

### 00:29:25

**Tayler Ramsay:** Great.  
**Eric Brittingham:** Um, merchant go in actions and tools cuz I see that we need to set them up. Um, what was stage again?  
**Tayler Ramsay:** stage is the process like any like a snapshot at any time in history of the process. So whether that's you signing up the original like your um your leads doing your lead generation or it could be Amanda doing you know or the merchant has signed up or merchant is now onboarded.  
**Eric Brittingham:** Okay. Pipeline because that  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** will say what stage people or merchants are in.  
**Tayler Ramsay:** Sorry, there's some duplicates. I apologize.  
**Eric Brittingham:** No, it's okay. Um, business details. Typically, we need to fill out some business details  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** uh when we set up accounts or prime near prime subprime. Um I'm going to put prime near prime subprime under reporting because that's how they like to typically break out reporting.  
**Tayler Ramsay:** That made sense.  
**Eric Brittingham:** uh lender selection. I think I want to put that into exceptions because sometimes there's just a lot of issues with our lender selection and our providers want to jam too many competing lenders into the same cascade.  
 

### 00:31:36

**Eric Brittingham:** And  
**Tayler Ramsay:** How do you handle that? I'm I mean that's a side note. I shouldn't even ask because I'm taking you off track. Don't answer  
**Eric Brittingham:** no,  
**Tayler Ramsay:** that.  
**Eric Brittingham:** it's it's fine. That's uh that's you know part of that lender cascade bottleneck. Uh I try to tell them to pick a starting point and let's address things from there because there is a possibility to get competing lenders into a a uh a platform but it's hard to get everyone to come together and agree ahead of time to do it. So  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** typically it'll take some leverage like you get started with a couple and then you leverage you leverage the platform saying hey we're going to be using the platform either you hop on um you've already seen a decline they'll probably have already seen a decline in in volume or whatnot. So either you hop on and you can still play within your space or we can just uh we're going to move everything towards the platform and stop using you altogether.  
 

### 00:32:43

**Eric Brittingham:** So  
**Tayler Ramsay:** Wow. Yeah. Yeah, I did it. I'll tell you, I feel your pain there just on the UX side of that because I always have to figure out how to get all their terms to work together  
**Eric Brittingham:** yeah,  
**Tayler Ramsay:** once they're on. Go ahead. Sorry.  
**Eric Brittingham:** uh QA check. I'll put that under action tools. I think we should have like we should definitely have more QA checks for um for like new platforms that we're building.  
**Tayler Ramsay:** Can you talk a little bit about that? I'm sorry. That's really good.  
**Eric Brittingham:** Uh there's a couple gaps within the current platform uh the white label platform where we developed uh in a previous implementation we developed a way for uh for patients for the application to autocreate a treatment record and within our system versus the typical way is you create a treatment record, you write in all the patient information, then you launch the application.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** Well, we had a big merchant that said, I want to launch the application and I don't want to have to deal with making a treatment record um for this latest implementation.  
 

### 00:34:10

**Eric Brittingham:** That's how they wanted to do it. they want to launch the application it automatically create a treatment record but we didn't implement uh I don't know if they implemented on that initial application screen the requested amount  
**Tayler Ramsay:** right?  
**Eric Brittingham:** so there's going to be multiple programs behind the scenes and we need to know what that requested amount is um so there was a little bit of a I guess miscommunication on how the practices are going to be launching applications. What the priority is  
**Tayler Ramsay:** now where do you think that communication breakdown happened and not breakdown I don't want to say that word I just want to and also just so you know and I know it probably doesn't matter to you this is a completely anonymous research study so anything we talk about I will roll up and aggregate into ID for everyone and they'll just be rolls. And I know you I just wanted you to know that. I should have said it from the beginning. I  
**Eric Brittingham:** That's  
**Tayler Ramsay:** always  
**Eric Brittingham:** fine.  
 

### 00:35:15

**Tayler Ramsay:** forget. But anyway, keep going, please.  
**Eric Brittingham:** I I think it happened on the uh the product level  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** that they weren't necessarily as connected to the uh as connected to the merchant  
**Tayler Ramsay:** Right.  
**Eric Brittingham:** even and and understood the merchants's needs even though we've kind of uh kind of projected. Sometimes I felt like it was a path. There was been a lot of pressure on building out the this one part and I think maybe we just took the path of least resistance without thinking ahead of oh yeah what if what if they want to launch this way which is how they wanted to launch in the beginning. So  
**Tayler Ramsay:** I get it. I understand exactly what you mean there. Okay.  
**Eric Brittingham:** um credential I would say credentials are in action items because we request credentials.  
**Tayler Ramsay:** I agree with that. Totally.  
**Eric Brittingham:** I guess that goes the same with lender credentials, but I don't need to duplicate. Um, versatile admin. I'll go into exception/issues since I don't know.  
 

### 00:36:42

**Eric Brittingham:** I I associate a versatile admin with support.  
**Tayler Ramsay:** Yep. Okay.  
**Eric Brittingham:** Save and continue and put that into stage. Uh, multistep wizard. Uh, that's multi-step wizard. I'm not going to put that in one anywhere for right now. Um, document upload stage. Um because typically I'll need to upload uh their uh agreement document within the portal.  
**Tayler Ramsay:** What point do you do that?  
**Eric Brittingham:** Uh typically after we get the agreement  
**Tayler Ramsay:** Okay. Okay. Is this have they've at this point has the merchant signed up through the applica or even if or just have they've agreed? I keep forgetting there's two ways to do this. Go ahead. Keep going.  
**Eric Brittingham:** Yeah. So th this is essentially they went through our check the box and e signature  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** and I just download that and upload it to uh Salesforce ticket. Put that under issues and exceptions. Config template under with action and tools. Go live checklist under stage status badge.  
 

### 00:38:25

**Eric Brittingham:** center stage.  
**Tayler Ramsay:** I'm sorry. One second. I'm Go ahead. I'm sorry. I apologize.  
**Eric Brittingham:** Yep. Bulk upload under Action and tools.  
**Tayler Ramsay:** Do you know what we mean by KYB? Just so you know, that means know your business.  
**Eric Brittingham:** Um, like a KYB lookup though. I I I don't know.  
**Tayler Ramsay:** Let me I can I'd like to explain that a little bit. So  
**Eric Brittingham:** Yeah.  
**Tayler Ramsay:** what we're looking into is a company named Worth who specializes in know your business. And what that means is with maybe five pieces of data we can we can underwrite they can underwrite. So that's kind of what that means. That's like a service that allows us to use public records.  
**Eric Brittingham:** Okay. So, uh we would be underwriting accounts like coming in or onboarding with us.  
**Tayler Ramsay:** Well, we wouldn't be underwriting them. The our partners would still be doing the underwriting. We just handle the information gathering.  
**Eric Brittingham:** Okay.  
 

### 00:40:01

**Eric Brittingham:** Um so then what what's the essential  
**Tayler Ramsay:** So, let me just give you an example of that one. Yeah. So, know your business lookup would be um I'm merchant uh Ramsay research. Okay. And I want to apply for it now. Instead of like filling out 35 fields like we us we do now, I can put in like my name, my address, my social and then this know your business lookup will go look me up on whatever records databases they have that service has and they can pull enough then the rest information that allows our partners the ability to either underwrite them or approve them or not approve them. So the lookup would be the actual merchant lookup like that person.  
**Eric Brittingham:** Okay.  
**Tayler Ramsay:** Yeah. Yeah.  
**Eric Brittingham:** I would say I mean I got caught with something in front. Um I would say that would be good for something to implement if we  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** were to streamline is that I don't I guess it would go into action.  
 

### 00:41:12

**Tayler Ramsay:** Yep. I agree with that. Yep.  
**Eric Brittingham:** Um same with autoprovisioning.  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** Uh observation window. Observation window would go into stage. Um based on that's when the beginning stage is when they I guess just kind of launch. Let's see how things go. stipulation goes into exception slashissues. Um so timer um we don't really deal with that status tracker stage. Um reporting a meta do form.  
**Tayler Ramsay:** And you think of the form then as like an artifact of like just something we generate then? Right. That's what you're kind of saying there.  
**Eric Brittingham:** Yeah.  
**Tayler Ramsay:** Yep. Perfect.  
**Eric Brittingham:** a form, a table or whatever a  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** document essentially.  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** Um under underwriter audit log would go into table  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** or uh reporting/meta.  
**Tayler Ramsay:** Oh, that's good. Thank you so much for doing that exercise. That was  
**Eric Brittingham:** Yep.  
**Tayler Ramsay:** that was great. All right, we're going to move right along here.  
 

### 00:43:07

**Tayler Ramsay:** Um, can you describe the most complicated onboarding you've ever handled?  
**Eric Brittingham:** Um, I guess the most complicated onboarding I've ever handled was me realizing I uh I was going to send out the users and locations guide and And I realized I didn't have anything input for hierarchy. Um, and the merchant told me like they have this many level of managers and this practice manager can actually manage five locations. So I needed to expand on the hierarchy part of the uh user and locations guide.  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** So that kind of like pushed me to build that out. And uh they were just a very picky client on how they wanted things done. So a little bit of back and forth.  
**Tayler Ramsay:** How could a new system support that? I guess you built the system actually. So  
**Eric Brittingham:** Uh  
**Tayler Ramsay:** that you already built  
**Eric Brittingham:** well,  
**Tayler Ramsay:** it.  
**Eric Brittingham:** I mean, how could the new system support that? Like I I enhanced it to now handle that a  
**Tayler Ramsay:** Yeah.  
 

### 00:44:30

**Eric Brittingham:** lot better.  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** Um there will still be nuances in the future. So people might have more levels than I put in the chart in the organization chart. Uh they can just add or uh edit as they need. So,  
**Tayler Ramsay:** Right. Right. That's  
**Eric Brittingham:** um yeah, I would say that was probably the most uh difficult onboarding in terms of uh getting that information, but also uh working with some of the lenders. They needed contract with the lender. So that took they're a larger organization. So that took like a couple almost two months for them to sign or finalize their agreement with the lender so we could start bringing the lender credentials on board. And then during that time they presented a first looks first look pricing to a program that's going to be second look. And then  
**Tayler Ramsay:** Oh, wow.  
**Eric Brittingham:** that just developed some headaches. So they need to go back and do a price addendum.  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** So um sometimes  
 

### 00:45:47

**Tayler Ramsay:** When did you find that out? Was it after the implementation or before?  
**Eric Brittingham:** no this uh this client hasn't been implemented yet.  
**Tayler Ramsay:** Okay. Okay. At least that's that would have been rough.  
**Eric Brittingham:** Well, just for example, I think we received their users and locations guide towards the end of March  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** and we're still working on m maybe beginning of April, but we're still working on getting them out the door.  
**Tayler Ramsay:** Wow. Sounds  
**Eric Brittingham:** Um,  
**Tayler Ramsay:** like water. Chris.  
**Eric Brittingham:** well, it's also we're building the platform, you  
**Tayler Ramsay:** Oh.  
**Eric Brittingham:** know, we're we're we're flying the we're building the plane while flying in  
**Tayler Ramsay:** Is  
**Eric Brittingham:** it.  
**Tayler Ramsay:** this the white label? Are we talking about the white label?  
**Eric Brittingham:** Yeah. Yeah, that's the white label.  
**Tayler Ramsay:** Yep.  
**Eric Brittingham:** So,  
**Tayler Ramsay:** Yeah, I'm Well, I've heard that story. I feel you on that one.  
**Eric Brittingham:** yeah, I would say probably one of the and kind of surprisingly one of the smoothest has been um Harland.  
 

### 00:46:35

**Eric Brittingham:** Getting Harland up and running. That that felt pretty smooth.  
**Tayler Ramsay:** Can I ask why? I mean, I know it's probably hard to tell you why it was smoother or not, but was there like things that happened that just made it  
**Eric Brittingham:** Well, I think this one had the attention of a project manager. It took some of the uh there was a lot more organization in it.  
**Tayler Ramsay:** talk about that a little bit? I know. Can you please talk about that?  
**Eric Brittingham:** Yeah. So um a lot more organization keeping track of development issues a whole another language that I don't understand. So um and there it was we needed to build the platform at the same time but I sent out a users and locations guide. You know I got that back pretty quickly. Um you know we changed things up in the future. We had to get our IT teams together. Uh, so that now I guess now what they do is they send a daily list and if there's a new location on it, we set it up automatically in our system.  
 

### 00:47:40

**Tayler Ramsay:** Oh wow.  
**Eric Brittingham:** Um, so that was that's pretty cool.  
**Tayler Ramsay:** Yeah, that is really cool.  
**Eric Brittingham:** Um, but I I just feel like the building part of that process that took a while, but getting their users locations onboarded out the door. Uh,  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** they handled their own training. So,  
**Tayler Ramsay:** Oh, really? Okay.  
**Eric Brittingham:** for the most part, Marlo got involved and they kind of transitioned and took it over as they  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** expanded. So, um, and that they only pulled Marus in for a specific part of the training  
**Tayler Ramsay:** Okay.  
**Eric Brittingham:** as well. So,  
**Tayler Ramsay:** Yeah. Do you see a lot of a lot of bottlenecks in training on other on boarding?  
**Eric Brittingham:** um, in regards to training resources, yes.  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** And training availability, especially now since we have, you know, one one person if they're not available, can't do it that day.  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** if the merchant's not available, you know, can't do it then. But it bottlenecks essentially down to one person who does have a busy schedule right now.  
 

### 00:48:54

**Tayler Ramsay:** Oh, yeah. Absolutely.  
**Eric Brittingham:** So  
**Tayler Ramsay:** But it's like that that's what this hopefully can help. Maybe automate some of her, you know what I mean? Help her out. Um,  
**Eric Brittingham:** yeah.  
**Tayler Ramsay:** yeah. If it say the tool was to launch tomorrow, what's the first training or cheat sheet you'd ask for?  
**Eric Brittingham:** uh training or cheat sheet like on what tool.  
**Tayler Ramsay:** So, say we're releasing this new platform that we've been talking about where we're trying to automate processes and make it where you can go on and look at where a merchant is in the process at any given time, have audit history, notification center, um, communication center between you and our partners. That's what we're trying to build  
**Eric Brittingham:** Mhm.  
**Tayler Ramsay:** is a platform that encompasses all that. So, what would you want as like a cheat sheet to something like that?  
**Eric Brittingham:** How would you need a cheat sheet if the platform is essentially the cheat  
**Tayler Ramsay:** I  
**Eric Brittingham:** sheet?  
**Tayler Ramsay:** know. But I just want to It's more to try to get like  
 

### 00:49:59

**Eric Brittingham:** I  
**Tayler Ramsay:** what  
**Eric Brittingham:** guess like what part of it would I want to be trained on  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** first?  
**Tayler Ramsay:** Yeah. Yeah. Exactly.  
**Eric Brittingham:** Uh yeah, I guess uh the actions that I need to do like how do I get how do I get it into their hands and how do I make it clear to them how they input the information so they don't screw it up on their end.  
**Tayler Ramsay:** Right. And when you say they, you're talking our partners  
**Eric Brittingham:** Merchants.  
**Tayler Ramsay:** or the merchants. Okay,  
**Eric Brittingham:** Yep.  
**Tayler Ramsay:** great. Yeah, that's perfect. That's what we're looking for. Um, do you ever have any actions? So, after you hand off to Amanda and she starts working with the partners to get credentials, do you find yourself doing still doing tasks to help the onboarding?  
**Eric Brittingham:** Um, yeah, I mean, as part of the onboarding process, it's like I'm still involved in at that point, we're still I can we can get the users and locations, but we still might be solutioning the actual solution.  
 

### 00:50:58

**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** Uh so figuring that out, but also u transitioning over to introducing our training team uh to Marus uh at this point and or training introducing our training resources, going over that and trying to I guess figure out what a training would look like for this specific client. Do they have a training team? You know,  
**Tayler Ramsay:** Yeah. Yeah.  
**Eric Brittingham:** uh some of that is, you know, Marus or whoever would be in charge of our in charge of the training we'll figure out. But um a lot of times it kind of time like so what what would training and roll out look like? So  
**Tayler Ramsay:** So almost like a template that you can trust and confidently communicate across Right. Something that's repeatable.  
**Eric Brittingham:** yeah. Yeah. Something like almost like a word track of like what is our ideal training like  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** I'd like to just essentially in my mind what our ideal training is path of least resistance is just a group training get everyone on one and done.  
 

### 00:52:15

**Eric Brittingham:** But  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** I  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** don't I think in the future having an automated you know having training videos and actually making sure people go and watch them would be great. We have um Hartland for H Heartland we created uh unique training videos for uh the white label as well. We created unique training videos, but we also for the white label, we have a we have a player of those videos in the portal.  
**Tayler Ramsay:** Cool.  
**Eric Brittingham:** So, that's something that's nice. It would be nice to uh almost keep track and hold people accountable to watch those videos.  
**Tayler Ramsay:** I agree. I agree with that. I've had a lot of discussions around this whole topic with other people. I agree with you 100%. I think we should have a platform that has like almost like a gamification to it where you  
**Eric Brittingham:** a  
**Tayler Ramsay:** get  
**Eric Brittingham:** training course type  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** thing  
**Tayler Ramsay:** Yeah.  
**Eric Brittingham:** like  
**Tayler Ramsay:** Agreed.  
**Eric Brittingham:** congratulations, you passed our training course.  
 

### 00:53:17

**Tayler Ramsay:** Exactly. Exactly. And then for you what that looks like is you can go to a platform and be like, "Okay, I see they've actually done this, this, and this is done." And you don't have to go find Marlo or you don't have to go communicate to the merchant. You could just look and see that.  
**Eric Brittingham:** Yep.  
**Tayler Ramsay:** Yeah, that sounds awesome.  
**Eric Brittingham:** Awesome.  
**Tayler Ramsay:** Um, hey man, that's that's about it. I really appreciate your time, Eric. This has been great. Great information. It's definitely going to help us drive forth whatever this thing looks like. Um  
**Eric Brittingham:** Yeah. Well,  
**Tayler Ramsay:** yeah.  
**Eric Brittingham:** thank  
**Tayler Ramsay:** So  
**Eric Brittingham:** you as well.  
**Tayler Ramsay:** yeah. Um I will we'll So this is going to be going on for a couple weeks. you'll probably I'll share um so anyone who I I meet with I'm going to share personally like any kind of like wireframes we start building templates so it's going to be a really small group but you'll definitely be involved in that just so you can see you know that this really everything you did here today it means a lot and it's really going to affect the products I promise you that  
**Eric Brittingham:** Yep.  
**Tayler Ramsay:** yeah it's  
**Eric Brittingham:** Awesome.  
**Tayler Ramsay:** been great  
**Eric Brittingham:** Happy to help. Yeah. If you need any other clarification on anything, just let me know.  
 

### Transcription ended after 00:54:59

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