
EE Podcast #92 Mergers & Partnerships with Clearfire

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Lea Alcantara: You are listening to the unofficial ExpressionEngine Podcast Episode 92. Today we're talking about mergers and partnerships with Chad Crowell and Casey Reid of Clearfire. I'm your host, Lea Alcantara, and I'm joined by my fab co-host.

Emily Lewis: Emily Lewis.

Lea Alcantara: This episode is sponsored by the [CSS Dev Conference](#). This year's CSS Dev Conference is situated in the Rocky Mountains, Colorado at the beautiful Stanley Hotel. Join us for two days devoted to CSS and its super friends, JavaScript, Sass, Compass and more. Speakers include Eric Meyer, Nicole Sullivan, Jonathan Snook, and maybe you. The call for more speakers is open right now. If you live and breathe CSS, visit cssdevconf.com to submit a talk, or register for early bird tickets as an attendee. Follow [@cssdevconf](https://twitter.com/cssdevconf) on Twitter for more information.

Emily Lewis: The ExpressionEngine Podcast would also like to thank [Pixel & Tonic](#) for being our major sponsor of the year. [Music ends] Hi Lea, how are you doing?

Lea Alcantara: Not too bad. How are you?

Emily Lewis: I'm good. I'm suffering from some pretty bad allergies right now, but other than that, no complaints.

Lea Alcantara: Well, that sounds better than what I'm dealing with considering that it's near the end of April and I have a snowstorm warning. [Laughs]

Emily Lewis: [Laughs] It sucks.

Lea Alcantara: But what can you do?

Emily Lewis: Yeah, once again, I'm reminded how lucky I am to live here in the land of a million sunny days. [Laughs]

Lea Alcantara: Nice, nice.

Emily Lewis: So we've got a really great topic today. I want to get to it as soon as possible, but first, we've got some news, ExpressionEngine news, to mention. EllisLab, I guess when they redesigned their site, I guess, in November of last year, a lot of the information about features seemed to be missing. But they announced, I guess, last week that they've got all those features back up online on their site, and looking at it, it could be a pretty helpful sales tool, and personally it's not organized that well visually, especially compared to that resource that Mike Boyink put together, but it's available from EllisLab which makes it official so that might be really appealing to clients or prospects who are interested in learning more about this software.

Lea Alcantara: Yeah, what I do find a little curious is that every single thing is linked so it feels like it's going to go do another page to the documentation, but it's actually kind of a show/hide to different paragraphs, so I'm not sure if that's necessarily successful, but I'm happy that there is a list of features that we can officially point to when we're working on the sales process with clients.

Emily Lewis: Exactly. Some other news from EllisLab, apparently, 2.6 is coming soon, and one of the things they said that we'll see in that new version is that strict URLs are going to be enabled by default.

Lea Alcantara: What do you think about that?

Emily Lewis: Well, I'm sort of torn. I always enable them, but I don't know. I guess it's not going to make a huge difference for my workflow, but maybe it will for other people. I'm not sure.

Lea Alcantara: For me, I keep strict URLs off, and I think that's mostly because I like to use like LowSeg2Cat to deal with category URLs and like custom URLs, and I don't want to have 404 if it doesn't have a template. So having search URLs means that would happen, but again, you can disable it by clicking on the button pretty easily enough, and at least this way by having it enabled, you're starting your site with their preferred suggested behavior.

Emily Lewis: Right, and whenever I start a project, I have like a huge to-do list of all of the basic setup stuff that I do, so that would just be something you could just add to your own to-do list during installation to make sure that it's set according to your own preferences.

Lea Alcantara: So what else is up in the EE world?

Emily Lewis: Well, this isn't like breaking news, but just a reminder to all of our listeners, the EE Stack Exchange is going strong. There's still a lot of unanswered questions, so do the community a favor and check out some of those questions and see if you can offer some answers. The more that we get, the sooner that it can come out of the beta phase.

Lea Alcantara: And I think that some people need to realize that you can also post answers to your own questions if you found out the answer. So sometimes if you've been troubleshooting your own situation and maybe you didn't actually pose the question, but you figured it out after plugging away at it, feel free to ask your own question, then answer it just so somebody else would see how you've solved that problem.

Emily Lewis: Good suggestion. The last thing I wanted to mention is the DirectorEE jobs listing. Last time I checked, I guess about a week ago, there are over 20 opportunities so if anyone is looking for part time or full time work, definitely check out director-ee.com/jobs.

Lea Alcantara: Perfect.

Emily Lewis: All right, so let's get to today's episode. We're joined by special guests, Chad Crowell and Casey Reid of [Clearfire](#), a web design development agency, partners at Clearfire. Chad and Casey are both developers with years of experience working with ExpressionEngine and running their own businesses. Welcome guys, thanks for joining us today.

Chad Crowell: Thank you Emily.

Lea Alcantara: So before we dive into our discussion. Casey, why don't you tell our listeners a little bit about yourself?

Casey Reid: Good to be here, guys. So I'm Casey Reid, and I originally started Clearfire back in 2007 as kind of an individual consultancy. I specialize mostly in ExpressionEngine development. I do a lot of our back end and front end work now along with some other people we work with. That's kind of, I guess, the basics. I live in Springfield, Illinois. I get to experience the Midwest weather. I actually grew up on the West Coast and I miss that very much. I have a wife and two kids with another one on the way, so lots of stuff going on.

Emily Lewis: And how about you, Chad?

Chad Crowell: Thanks a lot. It's so great to be here, Lea and Emily. You are two of my favorite people, so I'm really happy to be here, and Casey, you're pretty good yourself. I'm Chad Crowell, and I'm also a partner in Clearfire, and I've been working on the web since 1997 and freelancing/running an agency since 2006. I joined Clearfire here at the end of 2012, so I also specialize mainly in development, but I also do a lot of the business end of things these days as far as business development and such, so we're happy to be here and tell you a little bit about where we're at with the business and kind of how we got to this point.

Lea Alcantara: It sounds great. Well, speaking about that, why don't we talk a little bit to both of you regarding how you each did your individual business before partnering. So Casey, you founded Clearfire in 2007. How did you run the business before joining with Chad?

Casey Reid: Yeah, I was in 2007. Like probably a lot of small business that started out, I was kind of doing work on the side and there was kind of a side project. I had another full time job, and eventually it got to the point where I had almost two full time jobs and I kind of leap of faith, I guess, to kind of go on my own and start a business.

So initially, when I first started out, it was more of a contractor than anything. As far as finding clients, one of the first things I did was I wrote letters or emails or called all the local agencies and other kind of web companies in my area to see if they had any available work, to let them know that I was available and just to kind of try and build some relationships locally and regionally with other shops that were doing what I was doing, and that worked out pretty well. When I kind of first started out, that was how I kind of gotten some of my clients along with the one-off projects from businesses I had worked with in the past.

I also did some work for HTML slicing services and kind of any jobs I can get my hands on for the most part when you're first starting out, and little by little that grew into more consistent work and more referrals, and after about the first six months or so I didn't really have to do too much looking for clients.

From that point forward, it seemed like projects kind of always came in through past clients and referrals and kind of that network tree, and as that kind of grew a little bit, my business grew both kind of revenue wise, and then eventually bringing in contractors and other people to work with me on projects until eventually a couple of years ago, I hired my first full time employee, and then certainly as Chad came on board, when we merged at the beginning of this year, so it's kind of just been steady growth year over year and the business has been successful and continues to go in that direction.

Emily Lewis: Casey, you mentioned that you did a little bit of, and it sounded like a little bit of everything. From that first six months until things were steady, did you find yourself specializing in the services you provided, or were you still doing some front end here and then maybe some ExpressionEngine there, and then maybe some with all of it?

Casey Reid: Yeah, a little bit of everything. I mean, when I first started out, I was doing design, front end development, back end development, and certainly the business side of things, accounting and all of that and kind of just a one-man shop, I guess, and that continue to be the case for the first few years. I would use contractors and work with contractors on occasion if I was either overloaded with work or just needed somebody to help me with something that I didn't have a specialty in.

In the last few years though, that's transitioned to be more back end development and certainly more on the business side of things, business focused, doing accounting and business development and that kind of thing, and part of that is because I was able to bring in some people to work with us and to work with me that have been great as far as design and front end development skills and that allowed me to focus more on the back end and ExpressionEngine development.

Emily Lewis: Now, when you were bringing people in to help with work when you were overloaded, like I mentioned earlier, did you post to the job board like on a DirectorEE type job board, or was it through people you met at conferences or people you got recommendations from other colleagues?

Casey Reid: A lot of it is just from building up relationships through Twitter and conferences and just the online communities that I'm involved in, and that's kind of have been the case for really my entire business. I feel like all the people I work with, and with Chad as well, our relationship started kind of online and through a mutual following on Twitter and it grew through there.

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That's been the same case for some of the people I've worked with and worked with in the past, contractors and just other people in the industry that I built up some sort of friendship or communication with just through online communication and found out that we are a good fit or that they had skill set that I needed to utilize on a project or vice versa, and that kind of was a mutual thing.

There have been people I've worked with where they've hired me to do work for them, and in turn I hired them to do work for me, so it's all just kind of have been about the relationships I've built up over the past six or seven years in the different communities that I've been involved with.

Emily Lewis: When you were hiring contractors, was that always your goal, or did you ever consider that someone might convert to an employee or that you might actually seek an actual employee?

Casey Reid: That kind of was a transition for me as well. Early on I was kind of on the fence on whether I wanted to just stay solo, kind of be a freelancer or a contractor and maybe just partner up with agencies that had overflow work and really just kind of stay by myself, and the flipside of that is growing a team and building maybe a business that grows and has people that work with on projects, and ultimately, I was like, "That was the route I wanted to take." That I wanted to bring in people that could work with me and that I could build a team with, and that we could kind of build something together.

So that was my goal, I guess, early on as the business continued to grow, and so when I would bring in contractors, sometimes it wasn't going to be a good fit to bring them on as an employee, and other times I could see that maybe that would be a possibility.

My first full time employee, Jon, who still works with us now and he's an amazing designer and front end developer, he actually started out as a contractor, and it was really nice the way that situation worked because he at that time had a full time job and just wanted to work a little bit, so I gave him five to ten hours a week and that grew to 15 to 20 and 25 to 30, and then eventually that transitioned into him being able to come on as a full time employee. So he could kind of grow commitment wise and hours wise as my business was growing as well, and it was really a nice way to kind of transition from a contractor to a full time employee doing it that way.

It can't always be possible or ideal, but for me that worked really well because that first hire and bringing on somebody full time and committing to paying their salary and just the kind of the risk and commitment that goes along with that is stressful and it's hard I think to make that first jump into hiring somebody and so being able to kind of essentially bring in someone that was doing contract work and then transitioning them into full time employment over the course of really six to nine months made that process a lot easier for me to go through.

Lea Alcantara: So Chad, does any of that ring true to you too with Casey's journey into starting a business and then hiring employees, et cetera? Because you run your own shop starting with WebInception in 2001 and then converted to Encaffeinated in 2010, so what were your experiences running your own business?

Chad Crowell: With some similarities and some differences, and I think that would be the answer that a lot of people in our place would give. I had two interesting opportunities in 2006 when I was working my last job as an online marketing manager. One was through a friend of mine who worked at a UX contracting company, and that company had contracts with PayPal and eBay and Oracle and Autodesk and all these great properties out here just north of San Francisco so locally to myself.

The other one was one of my best friends became the director of marketing at an agency at the next town off from where I live, and basically did not have a lot of love for the web team he inherited, and they both kind of came to me at the same time and we had a one year old at home and I approach Heidi and I said, "Listen, this is my chance," and she wasn't too keen on it, I would say, on taking that leap of faith. There's something about a steady paycheck and other benefits that it really is a grounding for a new family with a new baby, but all the way back to running my first lawn mowing business when

I was probably in 6th grade, I just have the entrepreneurial spirit in me, and so I kind of made her a little promise that I'd work really hard.

It worked out actually, and here I am seven or eight years later and it's kind of the same story in that as soon as I was freelancing, it seems like within six months, I could not really find enough hours to do all the work that was coming, and it was through friends who heard that I was doing this on my own now and companies and the people that I had met in the past who were looking for web developers and designers, and that evolved over time.

You have asked Casey kind of was he like a jack of all trades, and I was as well, but it didn't take me very long at all to figure out that I am a horrible designer, and I got to the point where I was just using all the budget to go through these design iterations and then I had to still build the thing, and it didn't work very well, so something I always talk about is finding your weaknesses. I know people say find your strengths, but I was able to find a weakness really quickly, and I began hiring contractors at that point to do design which persisted all the way through 2012 here where I joined Clearfire at the end of the year, and then we had a fantastic designer on staff, Jon Thomas, at Clearfire who Casey mentioned earlier. I've never had a designer on staff, and so that to me was just a huge step forward professionally for me.

But I kind of went with that contractor model as well, and that's kind of how Casey and I hooked up again through Twitter back in 2007 or 2008, but most likely through the EE forums, kind of those channels and just kind of grew a friendship and also a professional understanding, and we just have a ton of synergy and it came to a bit of ahead middle to late last year where we just decided we keep hiring each other for these projects back and forth, why don't we just get together on everything, and then that's kind of how we got to where we are.

Emily Lewis: Before we talk about you guys partnering, Chad, I'm curious. As Lea mentioned, you had started with WebInception and then you became Encaffeinated. Why two companies? Was it just like a rebranding? What was the difference between the two?

Chad Crowell: Businesswise, there was not a lot. WebInception, I started back in, I want to say, 2001 or 2002, and as with a lot of companies these days, it was a domain name that was available. It sounded pretty good when you speak it.

Emily Lewis: [Laughs]

Chad Crowell: And I think before that, it was Chad Crowell Enterprises or something, something horrible that you do when you get your first business, so I sensed. As things grew with WebInception, I got to the point where I felt like I didn't want to be tied to "web" necessarily.

Emily Lewis: [Agrees]

Chad Crowell: I wanted to be a marketing agency, and the name precluded that, so when I decided to incorporate, which happened at the beginning of the year in 2010, I decided to go through a full rebrand at that point, and Encaffeinated was born. So it really was the same company. I had definitely spread my wings a little bit for a few clients where we do print marketing and copywriting and 3D rendering and promotional item purchasing and little USB sticks that we fill up with things, and I've had app developments so there were a lot of things outside of just doing websites that kind of led to that decision.

It's funny because in the time since then, I definitely bring the back end, and Casey and I now have a business plan that has us concentrating very specifically on web apps and websites. So the whole reason for dropping web in the name kind

of doesn't even matter anymore because we have a very unique focus now, or specific focus, I should say, that really doesn't have anything to do with why that decision was made.

Lea Alcantara: So you guys are telling each other's stories, it's clear that you both had separate successes on your own and obviously collaborated in the past, and even though you do mentioned, "Well, it seems like we're working together so much, why not just merge," was it really that simple? Because, I mean, that just sounds a little too easy.

Casey Reid: I felt like that decision kind of was like something we were talking about for two or three years. In conferences we would be at together or IM messages or on phone calls or even just meeting for projects we were working on, we almost would loosely pass around the idea, "Oh, it would be fun to work together someday and it would be fun to just be able to do this all the time."

But it didn't really come to a head I guess until later last year where through conversations and through just talking more about our businesses and where we were both at that it kind of became more reality, and part of the reason is I think we both felt like not that we were maxing out as far as our businesses go, but things were maybe slowing down a little bit as far as growth and as far as what we are able to do with kind of running our businesses individually with an employee or two or some contractors and that we were both super busy and overworking ourselves, and I mean, we were doing the same things. It's like we were building the same types of sites and working with the same types of clients, and even building the sites the same way to a certain extent.

So I think we started to realize there were some efficiencies that could be gained by maybe teaming up, and even in that process we initially started as kind of thinking about it in smaller terms, "Well, maybe we'll just hire each other for every project. Maybe we'll just kind of team up that way in a kind of a non-formal way." But I think it was like December of last year, and we kind of just gone bowling and we both talked about it like, "What are we doing? Like what are we waiting for? Like let's just kind of go with it. Let's just kind of make a jump and kind of see where it goes." That's kind of when we decided to merge and partner.

Something that touched on before that is that one of the reasons that made a lot of sense and made that whole process a little bit easier is outside of business, we're friends, and we have a lot of respect and trust for each other and we built up a relationship over the last six or seven years that is a very strong friendship, and outside of the work side of things, we can hang out and have a good time and laugh, and we have very similar values and morals and just think similarly on a lot of things even aside from the business, and so that combined with some of the things we're doing from a business standpoint or professional standpoint, it just seemed like it made a lot of sense. There was a lot of synergy there and a lot of overlap in what we were doing.

Emily Lewis: I'm curious you mentioned that you guys, the core your relationship is this friendship, which always I think is critical, but at the same time, I wonder, are you ever concerned? How do you separate business and personal? Like if you have to have a tough conversation, how do you guys manage from keeping it personal? For example, one thing that occurs to me and perhaps this wasn't an issue for you, but when you decided to partner, how did you choose to drop Encaffeinated and be Clearfire?

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Chad Crowell: It's funny because a lot of people will say, "Don't work with your friends. It's a horrible idea, whether they are a partner or a client," and I can draw on a little bit of experience because as I have mentioned a little bit earlier, one of the first contracts I was able to get was one of my best friends since college, since the early nineties, and we still work together seven or eight years later. He's still one of my biggest clients, and I can tell you we've had plenty of difficult conversations, and it's a Wednesday meeting where he's tearing my head off or I'm complaining about this or that, or

whatever within his organization, and then we go out to lunch and have pizza ten minutes later, and we talk about family life and we talk about baseball and we talk about beer.

So I know that I'm capable of making that separation, and I think really what it comes down to is the trust thing. We're in this. We're on the same team and we're in this for all the right reasons, and we understand. I mean, we both, Casey and I have been in this long enough on our own that we understand that it's not easy to run a business and to be successful and to grow in to support employees, and to create and give good service to clients regularly, and just leads to a level of professionalism and trust that Casey and I feel we have. Will there may be some tense spots in the future? Of course, we're expecting that, but it's a situation where we just feel that we can go into it knowing that we're on the same team and we can come to a resolution. As far as dropping Encaffeinated, the hardest part of that was getting rid of that beautiful branding that Lea did for me three years ago.

Lea Alcantara: Why, thank you.

Chad Crowell: You don't even know how many compliments I had on that logo. It was funny. I hate to see what it came down to. I hope I never have to freaking spell Encaffeinated the same again. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Casey Reid: [Laughs]

Chad Crowell: Yeah. So part of merging was, as Casey mentioned, being able to combine resources. For instance, Casey had Jon who is just a wonderful designer and front end developer on staff. I have my wife, Heidi, who is a business manager and has always done the books for my business. We also have Tania who is a project manager.

As you can see there, there is zero crossover. Casey and I are really the only crossover, and so by coming together we now have a team of five where we have two partners who know how to run a business and how to develop websites, and Casey can even design if he's put to the fire. But we also have a great designer, a great front end guy, a great business manager and a great project manager.

I was in the room with Heidi and Tania, and I just looked at them and I said, "I just think we should go to Clearfire, and in my mind where these small things abound and we won't ever have to spell this again and things like that." But I don't know, for some reason for me, it felt natural, and yes, there was a weirdness of giving up my company and it lasted for a while. It certainly did, and it's gone now months later, but it's kind of like maybe sending your baby off to college or something like, "Okay, I have to completely let go of this." But I'll tell you what helped is that I immediately had to dive into the Clearfire brand and work to make that company successful. So I didn't have any time to be distracted by feeling sorry for myself, and it's been fantastic. I have no regrets.

Emily Lewis: So when it came to partnering, is that like hiring an employee? Like Chad, are you now an employee of Clearfire? Like what was the business changed to have a partnership versus like hiring an employee.

Chad Crowell: It's different. I guess, there are some similarities. This wasn't a buyout or a hostile overtaking or anything. [Laughs] It was a true merger and there are several types of mergers. Basically, we did a tax-free transaction in the State of Illinois, and basically, there's a surviving entity and a disappearing entity, and we hired a lawyer and did it.

We went through all the right channels, and essentially, what happens is I traded the assets of my company, which essentially are my client roster and all the physical assets, computers, desks, et cetera, for 50% ownership in Clearfire,

and so Casey and I are equal shareholders and partners. He's the president, I'm the vice president. It's an S corporation, so it's not an LLP or anything along those lines, but we are equal shareholders and so we have essentially equal say on the direction of the business.

So because it's an S corp, Casey and Jon were already employees. I and Heidi and Tania's contract, we're employees of Encaffeinated so now all of those people are employees of Clearfire now. So it's a little bit of a mix of what you asked, but that's kind of how it went down.

Emily Lewis: What kind of lawyer did you hire? Is it a special area?

Casey Reid: It's just somebody that was referred to us actually by our accountant who had worked with a lawyer that had done mergers and transactions before, and so he's a lawyer here in Illinois that we had basically talked with and found out that they have a specialty in dealing with mergers and partnerships and corporate transactions really, a corporate transactions lawyer. There's not anything complex about what we did from a merger standpoint, and so it was really just submitting some forms and doing some paperwork and now sending us a bill through the work that they did.

Emily Lewis: Casey, Chad had mentioned earlier it was a tax-free transaction. What does that mean?

Casey Reid: It's just that there's no taxes involved I guess. [Laughs] That was just what our lawyer and attorney called it. I think from a tax standpoint, there's not a transfer of our physical assets necessarily. There's not things that we're having to pay taxes on as part of the merger. We kind of started the year as a merged company and our taxes are kind of I guess started over from that point forward as far as I understand it.

Emily Lewis: So with you operating Clearfire before to now merged with Chad, did it change any of your tax structure, or how you have to plan for each year?

Casey Reid: Not really. I mean, the corporation, it was an S corp before, and it still is now, and through Heidi, like Chad said, she does all of our kind of accounting and business management stuff, and so that process for me has actually been a little bit easier in that I don't have to deal with kind of the financial accounting type of stuff of running the business, which has been great, and there's not really much that has changed in terms of that outside from we're paying more taxes because we have more people on higher payroll and that kind of thing, but there wasn't any corporate structure changes that affected me or that changed the way it compared to how we were doing business before.

Lea Alcantara: One thing that I'm concerned about or I'm curious about is, well, Chad is in California and Casey is in Illinois. Are there any issues with partnering up interstate as you mentioned tax? We were just talking about tax, how about that?

Chad Crowell: There's not. We have a great accountant there in Illinois who Casey has worked with for a while and Heidi has worked with him. She's got quite a bit of expertise after dealing with our taxes for so many years. So they've been working together on making sure that our bases are covered, but essentially, it's kind of the same thing. We pay payroll taxes just like we always have separately. It's just now it's together. We do pay state taxes in Illinois and in California, and lucky us, Illinois and California are pretty much 49 and 50 with the states it has to do business in, and so we have some taxes to pay.

Casey Reid: [Laughs] Yes.

Chad Crowell: But I mean, essentially, it's not much different than what it was before. There is a little bit of a going where you have to declare how much business was done in each state and because of the type of work we do, and if we were doing manufacturing in California and sales in Illinois, it might be different, but essentially, we are saying 50 here and 50 there, and that way we're basically paying California taxes on 50% of the business revenue and 50% to Illinois, and so those might be different tax rates, but again it's just kind of knowing how to approach it, and we've got Heidi and a professional CPA to kind of deal with that.

Casey Reid: And there are some, not issues necessarily, but there are some additional expenses, and it's probably the case for anyone who has two offices. So insurance policies for both offices in both states and those rates are slightly different. So there are certainly some additional costs and having kind of a multi-office, multi-state operation, but nothing that is prohibitive for what we're wanting to do.

Emily Lewis: In terms of the fact that you guys are not only in different states, but you're in different time zones, has that been difficult to manage in terms of staying in touch and up to date on projects or just general business management?

Casey Reid: Not really. We have a two-hour difference, but for both of us before and after the merger, I mean, our clients are kind of spread all over. I've had clients on the West Coast and Chad has had clients on the East Coast and everywhere in between, and so we try to structure our conversations and team meetings and things like that.

We have times throughout the week that we're all available. We have a meeting on Monday with the team where we stand up, I guess, where we review what's going on for the week, and Chad and I have periodic calls throughout the week and a Thursday business meeting. We're both kind of involved in a lot that's going on, and so a lot of it just comes in communication and figuring out when we can be available and when we can meet, and a lot of it is just on the fly as well where I may have a question and I'll just kind of ping Chad to see what he thinks about it.

So some of that is structured with some structured meetings and certainly on the client side of things, we're making sure that the times that we're all involved with client discussions are times we are all available, but with only the two-hour difference, it hasn't been much of an issue so far.

Chad Crowell: Yeah, and like any web agency, we use Skype and HipChat and everything else, Basecamp, to kind of keep the communication going. So I hate to say it, but we're always kind of online, and even last night actually, 8 o'clock our time and 10 o'clock Casey's time, we had a little business call with Heidi, Casey and I because today is tax day and we needed to make sure we have everything taken care of, and it stinks to have to do that a little bit, but between us having two kids and Casey having two and a third on the way and actually doing production work and business development during the day, sometimes that's the best quiet time to have a targeted discussion about something like taxes.

Emily Lewis: Now, do you guys either currently have or plan to have in-person meetings, whether it's to discuss actual work or just connect face to face.

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Casey Reid: Yeah, I think, absolutely, that's the goal. When we first merged at the beginning of the year, Chad actually came out for a week and hang out with us at our office here, and him and Jon had never actually met in person before and so it was a chance for us to kind of all just bond a little bit and spend some time together and talk about. Chad and I talked about some business strategy and stuff for the year.

Certain projects that allow for travel where we can all go and meet at the client site, I think we'll use that opportunity to not only meet face to face, but just to kind of to build our team and to bond a little bit more, and then I think periodically throughout the year, there will be things like EEI and other conferences we may go to where we will kind of try to go there and piggyback on top of those things to spend some more time together. Eventually, we may do things like team retreats or just kind of spending trying to find some time throughout the year where we can spend even more time together.

That face to face is important. We can certainly be efficient and run a business virtually, but that face to face connection is important and I think helps kind of solidify and build relationships.

Emily Lewis: One thing I wanted to talk about are some of the details in terms of how your business has changed, how you operate has changed once you've partnered. One of the first things I wanted to find out about is, you both have mentioned the fact that you both share a lot of the same skill sets. So what's different now? Have you divided up things so that Chad handles marketing or business development, and Casey, you handle something else, or are you both still involved in everything, but it's divided amongst the projects?

Chad Crowell: We're definitely both in everything still, and we've had a lot of discussions about how to do this because part of the reason that we thought this would be a great idea is because we'd be able to find efficiencies. I had already mentioned the fact that now we have a staff designer that Encaffeinated never had, and we've got a staff accountant that Clearfire never had and a project manager that Clearfire never had.

Those sorts of things are very obvious, but where the overlap is with Casey and I is we haven't struggled, but we've had a lot of theories on how best to address them, because, for instance, I'm flying out to Vermont next week to meet with a client to do a kickoff. It doesn't really make a lot of sense for both of us to be out there for the full week. We've got the business in a place where anything that I learn on that trip will be disseminated to the correct people in the company to get work done.

So it's things like that where we're just trying to make a decision on what's the best way to spend the resources we have. A lot of what we've done up until – this one is in April – so maybe around the first of this month or the middle of March really after the merger, I was still just working on my client projects and Casey was still just working on his. We didn't have any new projects to start yet, but we did have to finish the ones that have started before the merger as well as support the maintenance work that we had done for clients on each of our separate rosters.

We've gotten to the point now where we've kicked off two projects about a month ago that are in full swing now that the whole team is working on. I now got Jon doing a bunch of front end development on some clients that were previously Encaffeinated so we're starting to see that mixing and efficiency where all the front end work and all the design goes to Jon. It's not just Jon doing the stuff that he had been working on up to last year.

So as far as Casey and I, I definitely have taken a role preliminarily at least of doing more business development, and it's really centered around a lot of social at this point. We're making a little bit of a logo change, a logo type change, and some branding changes, and so we want to make sure that as we start getting into more initiatives that wherever people encounter Clearfire, that they see the same branding and it's recognizable. So whether it would be Twitter or Facebook or LinkedIn, Drupal, et cetera, we're kind of making an initiative to get that all kind of set up so that when we speak or when we write blog articles or whatever the case may be, or be on a podcast, that if people look at us up, they're going to see the same type of branding and messaging everywhere.

As far as business development, we've kind of leveraged a lot of the relationships we've already had. We are starting a couple of projects soon based on referrals from other agencies that we've worked with in the past, and like I said, we now have essentially a double-sized client roster where we're having to focus on making sure that we continue to create good work for them and do good maintenance work for them and keep them happy so that we continue to build those relationships that we've had for quite a while now.

Casey is kind of have been looking at taking over the development end of things kind of as a development manager, but we're both still developers and it's going to take both of us still doing production work and development to keep things going. Eventually, we would like to be at the point where we're both managing and not necessarily doing production work, but that's a long, long way off. So we're being realistic right now and kind of keeping both of our heads down and making sure that clients are happy and being sure to look up often enough to make sure that we've got the next project scheduled and ready to go so we can keep cash flow going.

Emily Lewis: So Chad, you mentioned you guys now have essentially like a doubled client roster. Does that mean you didn't lose any clients with this merger?

Chad Crowell: No, we didn't. I don't think we did. No, basically, as soon as we kind of shook on it, I sent an email, a strongly worded email to all my clients where I basically explained what was going on, and it's funny because there was a little bit of déjà vu. I had sent an email that was very similar to them back when we switched from WebInception to Encaffeinated. It's basically, "The name is changing and email address is changing and the website is changing, but everything else is basically going to be the same."

In this case, I was, of course, able to say that our team is growing. We're now going to have on staff this, that and the other type of resources, and be able to serve you better as we leverage these resources and get more efficient. Casey, I can't recall you losing any either, right?

Casey Reid: No, I mean, especially for us, there was a lot of the same benefits, growing team and more resources and more people to kind of help with the client projects, and it wasn't ever an issue for really on clients that we have or projects that were ongoing at that time.

Lea Alcantara: So Chad, with your particular clients, because you're the one merging with the Clearfire brand, did they have to re-sign a new contract to move forward with Clearfire since it is technically a different entity?

Chad Crowell: Yeah, you're exactly right, and not only that, but new W-9s. I don't know if you have those in Canada, but down here, we do have to do that for typically any client who hires somebody who makes, I think, it's over \$600 or \$800 for the year, there has to be a W-8. It's just the tax form. So yes, as we have worked with my old clients, Encaffeinated's old clients, under Clearfire, one of the first things we do is say, "Hey, we need to get a new contract together."

For the most part, Casey and I had shared contractual or I guess shared verbiage from contracts and other legal documents previously, so there wasn't much change in what those documents consisted of, and it was a pretty easy transition. Nobody really had any major questions other than, "Who's sending me my bill?" And if we're lucky they ask, "Who do we send our checks to?" That may have been one of the biggest changes honestly, and it's really pretty small is that a lot of Casey's clients started sending their payments out here to our office so that Heidi can process them, and again it was wasn't a problem if a check came to Casey, he could still take it to the bank and deposit it, but there was some communication that had to go on there to make sure that it as smooth as possible.

Emily Lewis: So Casey, now that you guys are together, has it changed your processes of the tools that you're using, even like with social media and your website, like how do you guys come together on moving forward with resources and tools?

Casey Reid: It has changed a little bit in that there is just kind of, I guess, more people to conversate around those topics and figuring how we're going to do things. A lot of it just kind of trial and error so Chad or I or Jon or somebody else may suggest the tool that's going to make things more efficient and we'll maybe try it out and see if it's a good fit. We still use Basecamp and HipChat and other tools for kind of the communication side of things. As far as somebody wanting to do something or try something, Chad has kind of taken a lead, I guess, in doing some of the social media setup and initiative, and as we're building that out, I mean, that's very likely.

I think a lot of what this is, it's just trusting that the other person is going to make the decisions with the things that they want to do, and so some of that, certain people have kind of decided why would they want to do this, and they would start to do that, and certainly for me as well, there are certain things that I've kind of wanted to start or do, and I'm kind of taking those initiatives and just getting other's feedback along the way.

As far as the website goes, our site that's out there now, it's somewhat of a one pager that I wouldn't say we put together quickly, but we kind of collaborated on and tried to get out there as quickly as possible just for the sake of having a site and a presence online that reflected the team and the work we are doing and the types of services we provide, but really it's kind of a phase one. We are working on redoing that with some rebranding stuff as well and just trying to not necessarily get our name out there more, but just provide a website and communication to clients and prospective clients and peers along the lines of what we're doing and the direction our business is going in and the type of work we're doing.

Emily Lewis: Now, has anything changed for you, Casey, in terms of how you're handling support now?

Casey Reid: Not really aside from just, again, kind of trying some different tools and stuff that we've been using. We're trying DoneDone for handling kind of support tickets and requests, and we've tried other tools in the past, and part of that is just figuring out what process works and what doesn't, a lot of trial and error there.

The one thing that has been nice with support in projects and even just kind of client communication stuff is I don't feel like I have to necessarily be doing all of that. Before when I was kind of solo or by myself, it's like I'm doing every support or request that comes in or every maintenance request and a lot of client communication, and as our team has grown, then certainly now that Chad is involved, we can kind of share some of that responsibility, and I may have something that comes in to me that I can't get to, so I can send that to Chad to see if he can, or vice versa.

So there has been a lot of kind of this collaboration and overlap on things like support and maintenance and making sure that our clients are handled, whether they were previously Encaffeinated or Clearfire clients, they are our clients now and that we're kind of helping each other take care of those issues. If Chad is out or I'm out on vacation or whatever it is, it's nice to know that there is somebody else that can kind of fill in during those times. I feel like my previous clients, I really trust them with the things Chad is doing that his thought process is the same for his clients that are now part of our clients.

Lea Alcantara: So speaking of tools then, let's bring this back to ExpressionEngine. Does the new company change how both of you use EE?

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Casey Reid: It hasn't really. I mean, the thing with ExpressionEngine that makes it nice is there are so many ways to do the same thing, so many different processes and methods and naming conventions and all that kind of stuff, to really get to the same end result. So one of the things we've done as far as using ExpressionEngine is try to come up with kind of a unified process. We have like our base ExpressionEngine install that has some of the default add-ons and settings and configs that we use for every project, and when we start a project, we start with that.

Before the merger and before when we work on our own projects, there were certain things that I did a certain way and certain things that Chad did a certain way, but there was also still a lot of overlap. There are certain things with add-ons we use and structure and methods and things that we use to build a site that were very similar, and so we've spent a little bit of time early on to finding some of that and figuring out what our folder structure was going to be and what naming conventions we wanted to use and kind of what our default ExpressionEngine install was going to be that makes it easier

for us to jump in and out of each other's projects if we need to, especially since for now, we're still doing the bulk of the back end development and ExpressionEngine development.

Emily Lewis: Is that something that you guys have documented, or is this just sort of a verbal agreement on how you guys are going to approach things.

Chad Crowell: We've toyed with documenting things like this. We had set up a bit of an intranet and a wiki early on, and oh boy, it was going to be really grand. [Laughs]

Casey Reid: [Laughs]

Emily Lewis: [Laughs]

Chad Crowell: But work gets in the way, and so it's more just a case of constant communication. I'll piggyback on what Casey said that there are differences that we're able to exploit as well. A really simple one that I learned about last year from Casey was I just always defaulted to using Solspace's User Module whenever I had any sort of need for enhanced membership features, whether it would be using your email address as your username or editing your profile on the front end, and Casey turned me onto Zoo Visitor which takes a completely different approach but accomplishes some of the same things, and in some ways is much, much different.

So we've learned from each other in that way, and that being kind of stuck in the way you do things isn't necessarily... while I would typically get the job done, there is a bigger world out there especially with the number of Devot:ee add-ons these days. I think there are 2,000 or something, and it's really easy for me to say, "Oh, this is with two sites, with user and structure, and this and that," and Casey could come in and say, "No, we really should look at A, B and C instead of D, E and F because that's going to help us get to this point and that point a little bit easier." So we're learning from each other in that way, and there's certainly a benefit from that.

Emily Lewis: Do you guys use any other CMS software, or is EE pretty much your bread and butter?

Casey Reid: That's still our kind of our bread and butter. I mean, it's still for the majority of the projects we work on, a great platform and handles most of what we need with the ability to do custom add-on development and really integrate with other software solutions and APIs and it has continued to fit the bill for the projects we're giving and the type of work we're doing. We're continuing to evaluate other options that are out there and making sure that we're not painting ourselves in a corner in a way, but for now it's still been a great tool and one I foresee us continuing to use into the future.

Lea Alcantara: So before we wrap this up, do you guys have any further news coming up for Clearfire? Where are we going to see you guys next? What's going on?

Chad Crowell: Yeah, we actually do. Thanks for asking. We are tentatively going to be in Chicago for Peers, and we've been talking with Jessica D'Amico about that quite a bit, and I'm also on the schedule to speak at EEI this year, and I was able to speak in 2010 in Leiden which for a lot of reasons, it was just a fantastic experience, and so I'm looking forward to working with Brad Parscale and being a part of that again, and seeing the community, of course. So a lot of my best friends that I spend eight to ten hours a day with in this communities, so it's always great time and I hope to see everybody. Both of us, we've been working on some internal stuff as well. For those of you who were at some point fans of the now defunct university project, we've talked about reviving that now that we have more potential resources to spend time on it. So we may have some training materials coming available soon. No promises, but we have been talking about that, and Casey, is there anything else? I'm not sure.

Casey Reid: No, I think that's it. I mean, we're starting to try to give back a little bit and thinking of ways that we can kind of give back to the community. I kind of have been admittedly somewhat passive in the past and maybe more introverted when it comes to this kind of participating in the community, the ExpressionEngine community and the web community in general. So we're looking for ways to kind of share what we've learned in business, ExpressionEngine, whatever it may

be through blog and podcasts and conference speaking opportunities. We're just looking to kind of share more and get back a little bit. So this year, I'll try to think of some internal projects that allow us to do that.

Lea Alcantara: Very cool. So that's all the time we have for today. Thanks for joining us, Casey and Chad.

Chad Crowell: You're welcome.

Casey Reid: Thank you. Yes, thank you very much.

Emily Lewis: In case our listeners want to follow up with you guys, where can they find you online, Chad?

Chad Crowell: Probably the best place is Twitter. I'm [@chadcrowell](https://twitter.com/chadcrowell) and you can always go to clearfirestudios.com as well.

Emily Lewis: And how about you, Casey?

Casey Reid: Oh yeah, on Twitter I am [@caseyreid](https://twitter.com/caseyreid). Yeah, that's usually the best place to find me.

Emily Lewis: Great, thanks guys.

Chad Crowell: Thank you.

Casey Reid: Thank you.

Lea Alcantara: [Music starts] Now, we'd like to thank our sponsors for this podcast, CSS Dev Conference and Pixel & Tonic.

Emily Lewis: We also want to thank our partners, [EngineHosting](http://EngineHosting.com), Devot:ee and EE Insider.

Lea Alcantara: And thanks to our listeners for tuning in. If you want to know more about the podcast, make sure you follow us on Twitter [@eeepodcast](https://twitter.com/eeepodcast) or visit our website, ee-podcast.com.

Emily Lewis: Don't forget to tune in to our next episode when Erik Reagan will join us to discuss development environments. Be sure to check out our schedule on our site, ee-podcast.com/schedule for more upcoming topics.

Lea Alcantara: This is Lea Alcantara.

Emily Lewis: And Emily Lewis.

Lea Alcantara: Signing off for the unofficial ExpressionEngine Podcast. See you next time.

Emily Lewis: Cheers. [Music stops]

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