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Follow-up with Owen Morgan on van scheduling

Owen Morgan · Wed 25 Nov 2026, 15:47

Summary

You called Owen Morgan at the company you met at the October logistics show to follow up on the van scheduling system, now that customer texts are working. He said it won't happen this year: budgets are frozen until April and December is their peak season, so nobody will look at a new system until it's over. He explained that next year's spend is planned in March, and if you want a chance you should send a one-pager rather than a long deck before then. He named ops director Karen Lee as the person who would actually use the system and be part of the decision. You agreed to send the one-pager next week and call back in the first week of March.

Key points

- Owen remembers you from the October logistics show and the van scheduling product
- No purchase this year: budgets frozen until April
- December is their peak season, so no one will review a new system until it's over
- Next year's spend is planned in March
- He wants a one-pager, not a forty-page deck
- Ops director Karen Lee would be the actual user and part of the decision

Decisions

- Nothing will move this year; revisit in March when next year's spend is planned
- You will send a one-pager before the March planning

Action items

> Send Owen a one-page summary of the van scheduling system
> You · next week

> Call Owen back to follow up on the one-pager
> You · first week of March

Promises

> Send a one-pager
> You · next week

> Call Owen back
> You · first week of March

> Consider the one-pager when next year's spend is planned
> Owen Morgan · March

Written up by Xcribe. “You” means the person who recorded this conversation.