

At Orderly, we're in the business of helping restaurant owners run smarter businesses.

But we can't fully help you if we haven't had restaurant experience ourselves.

Luckily, when it comes to running a restaurant, we're not chickens walking around with our heads cut off. Most of our employees have been in the business. We understand the heat of the kitchen, the organized chaos of the floor, and the restraint it takes to not yell at a difficult customer.

On our staff, we've got former chefs, former hostesses, former GMs... The list goes on and on.

We employ their help throughout all of the advice we share with you. But often, we stay general. This time, we wanted to get specific.

In order to give you the freshest tips and tricks – we gathered up a small group of the restaurant experts on our staff. And we simply had a discussion.

We picked their brains – we asked them to share their crazy restaurant experiences, and discuss how having Orderly would have changed their restaurants for the better.

In the following pages, you'll find the candid discussion we had with these four experts.

Learn about their experiences, and take their advice.

Then, <u>download the Orderly app</u> and see how you can start saving thousands of dollars and hours of time.

Note: This transcript has been edited for clarity and brevity. Names of restaurants have been removed.

MODERATOR So if you can just start and go around and say your name, what your position is here at Orderly and just a quick overview of your experience in the restaurant industry. We'll start with you, Matt.

MATT O'NEAL I'm Matt O'Neal. I guess technically my title is Manager of Data Analytics. I have, including Orderly, 16 years in the restaurant industry. My experience is mainly fine dining. I worked my way up from a cook up to Chef de cuisine at a French restaurant where we were doing about \$6 and 1/2 to 7 million in sales a year. Yeah, I have a pretty solid background in different restaurants.

> I've worked in a lot of different restaurants under lots of different chefs. They all had different philosophies about how to run a restaurant, definitely from a culinary standpoint and from a financial standpoint. I've seen restaurants that are super organized where you've got your spreadsheets and you're running your costs daily and you know how much money you're spending. And I've been in restaurants where the method for taking inventory was basically walking around and writing on a piece of paper.

I've dealt with the gamut, and I feel I have a pretty solid understanding of you how restaurants are run from a financial standpoint, as well as all the other fun aspects of running a restaurant.

KYLE FAUCHERMy name is Kyle Faucher, I'm a Customer Success Manager
here at Orderly. I have about 20 years of experience in the
restaurant industry. I started as a busser at a local steakhouse in

Syracuse, New York and I left there after finishing grad school. Started front of house, uh when I moved here to Atlanta. I moved up to management after a couple years and have been a GM or directed operations for small mom and pop places to fine dining here in Atlanta. I also moved to South Carolina for a couple of years where I was a consultant with restaurants.



I've seen everything from totally unorganized restaurants to **KYLE FAUCHER** (Cont.) really super-organized ones. Working in the industry, we know that it's crazy and chaotic - We were just laughing about it today, some of the things that we loved about it and some of the things that we hate but we love that juice you get when it's a great night. The better you organize it, the better those days go.

So, I'm Alix Huntsman, I'm a Customer Success manager. My **ALIX HUNTSMAN** parents were restaurant owners, so I was like rocking the dish pit at like 8 years old. When I graduated from high school, my first job in college was waiting tables.

> I've done everything from like mom and pop restaurants to like big box things like [Restaurant A]. I was [Restaurant A]'s food and beverage manager for almost 2 years. And you want to talk about just like an amazing amount of food... On a Saturday night, we would do \$101,000 in sales, \$50,000 of that game revenue, and then the rest food and beverage. I've stood in the back of an expo churning out noodles in an Asian restaurant and I've stood next to a window watching hundreds of burgers flipping around. Now I'm here at Orderly, and it's great.

I'm Nancy Cannon and I am a Customer Success Manager NANCY CANNON and I've been in the industry for almost 15 years. I started out as a smiling people greeter at [Restaurant B]. I was a line cook. I was a dishwasher. I was a bartender, a server. Anything you can-You name it. A GM most recently, I've seen it all. [Restaurant B] was corporate, and then I went to [Restaurant C] which had no rules at all. And it was an absolute cluster so that was fun to figure out.





- NANCY CANNON When I first heard about Orderly, I was like, "I have to be part of this, 'cause every restaurant needs this." You know, they need a simple way of doing things with less time. And invoicing and Quickbooks entering that Orderly takes away gets you out of the office and more on the floor. Which is the important part, because that's what drives revenue.
- MODERATOR So, you've all kind of talked about things restaurants did well and things that they didn't. Especially in terms of profitability and inventory, throughout your experience what are some things you've seen that restaurants have done really well and what are some things you've seen that just made your head explode?
- **NANCY CANNON** We'll start with my head exploding. (laughs) Like being forced to order things that I did not need or want to carry.
- **MODERATOR** Like what?
- NANCY CANNON For instance, we would do beer and shot specials for the month, but our owners would get kickbacks if we ordered a certain amount of stuff. So, one summer we had to order 6 or 8 cases of this one kind of tequila. When our sales could not support that and we were sitting on this tequila for literally 2 years, 'cause it just wouldn't go anywhere. But they got to go to a Falcons game.
- **KYLE FAUCHER** There's food kickbacks too.
- MATT O'NEAL Yeah, and the thing that people don't realize is you're paying for that. You just- It makes you feel good when you get those

tickets to the Falcons game as a manger, but it's not free. You're paying for it. Full stop.



NANCY CANNON Right. Now you're having to come up with all these different recipes, and you're kind of basically giving it away. Who wants \$2 tequila shots? You're not making any money on them. Also, nothing was organized, inventory was mess. People would hide invoices to make their food costs look better, and then on like a slower week, they'd just slide that in.

But then, on the flip side of that, like with [Restaurant B], you have things in place corporately- You know, you're corporately trained, you're corporately structured. You had, you know, your spiel, you had to go to the table and say these exact things instead of you know, what do you want? It was you know, this whole specials of the day and are you a first time guest and all that stuff. But those were the things that paid off.

- **KYLE FAUCHER** Having expectations made you more profitable.
- **NANCY CANNON** Mm-hmm (affirmative) definitely.
- **KYLE FAUCHER** 'Cause you know there was just money flying out the door.
- **NANCY CANNON** Out the door! Or your manager is consuming half of your bar supply and you wonder why you have 30% liquor cost.
- ALIX HUNTSMAN Oh my gosh!
- NANCY CANNON And they're like, "I'm confused."
- KYLE FAUCHERWhen I worked at [Restaurant D], my training was 4 months.It was major training. I went 2 months in back of house, 2

months front of house. When I came from front house, I'd never been in the kitchen before but that ran like clockwork. We would line up, we had expectations. Servers had to have everything on right. The line had a line you know, went through checked the line each time.



That's how it was at [Restaurant E], too. Twice a day. NANCY CANNON

- You did line check. You did prep sheets. You did everything. **KYLE FAUCHER**
- Tasted stuff. **NANCY CANNON**
- **KYLE FAUCHER** Yeah absolutely. I tried Hollandaise every frickin day.
- **MATT O'NEAL** See, the funny thing is I'm sitting here thinking about you know, all the crazy things that happened, when it came to processes and things like that. But one thing that I always remember- this was kind of instilled in me. The one thing that we really stressed in that restaurant was consistency. Consistency in all aspects of life is really difficult- It's incredibly difficult in a restaurant.

But all those things that you were trying to do... Your line checks, all of your spreadsheets. If you're not consistent at that, you know, you're not going to be successful.

l agree. NANCY CANNON

MATT O'NEAL Now, when I go out to a restaurant, I typically go to restaurants that I know are going to be consistent. I'll pay \$15 for a hamburger, if I know every single time it's gonna be the same damn hamburger that I got there last week.

NANCY CANNON Yes.

MATT O'NEAL But if I go to restaurant and its awesome one day and its horrible the next day, I'm not going to give you my money.



- NANCY CANNON That's the case with multi-sites too. Like, with [Restaurant C], I had regulars that would go to another site and be like, their food tastes so bad so we go to yours. When you have the same chain, it should all taste the same.
- It should. Everything should be the same across the board. **ALIX HUNTSMAN**
- MATT O'NEAL A lot of really actually good restaurants give bartenders a budget for comps.
- We got \$25 per bartender. NANCY CANNON
- Yeah and you can go in and you can give away a free drink and MATT O'NEAL its still tracking. You know what your liquor cost is and you don't have to worry about things at the end of the day.
- I always told my servers, I would rather you have higher comps NANCY CANNON than let money walk out the door. That was my number one rule, Ring it up, I don't care if I'm paying for it or they're paying for it. If it's justified.
- **KYLE FAUCHER** I respect the people that came from the kitchen. They know you're putting out the plate the exact same way the chef wants it, every single time. And that's the consistency you want to generate every single time.
- And it's hard! I spent one month in the kitchen training, and that's NANCY CANNON the reason I cried every day.
- **ALIX HUNTSMAN** No you didn't!

Yes I did! (laughter) NANCY CANNON



MODERATOR On the flip side of that, did you ever find that too much process became too much? Or was it always for the best?

- MATT O'NEALProcess of the sake of process is the thing that you generally try
to avoid in restaurants.
- **KYLE FAUCHER** And I think, there's also efficiency. You want, like, on the line you have everything within grabbing distance. As a server you carry ten things into the kitchen, you carry ten things out. So you set yourself up for success with all those processes.

We get used to doing the things that make sense, like doing a line check. Because that actually makes you successful throughout the service. But if you're just told to go and, you know count inventory and the reserve every month, It doesn't do any good.

NANCY CANNON Some processes turn you into almost a robot. Like, you couldn't be you. You had to say certain things which took, it took away from the customers' experience. Which is the number one purpose of any restaurant, is your guest experience.

But as far as processes in, like, setting up. Of course the restaurant has to be set up the same way every time. There are too many people that work there that if one thing is off, then the whole thing is chaotic. People are very, they are creatures of habit. I know that the tea goes here, I know that lemons go here, if the lemons are over there, we freak out. You know what I mean? Like, I am just used to the lemons going here! (laughter)

MATT O'NEAL

That's true of any ... I think the other thing that a lot of people outside of the industry, and sometimes people that are getting into the industry, don't understand is at any given moment, pretty much no matter what your role is in a restaurant, you are juggling...



NANCY CANNON A million things.

MATT O'NEAL ... 20, 30, 40 different things in your head that you need to be tackling. Maybe you're a server who just got sat with a nine top, and your three top finished off their water for the 17th time. (laughter)

> So having that system of: You know that when you go to reach for, you know, a lemon, it's gonna be in the exact same spot.

- **NANCY CANNON** And it's gonna be full. Because whomever used the last lemon, they are gonna take more lemons out.
- MATT O'NEALAnd again that all comes down to process, and consistency of
process. Because restaurants are all about just coming in and
doing the same damn thing that you do every day.
- **ALIX HUNTSMAN** Yes. It has to be.
- **NANCY CANNON** It has to be a well oiled machine or it won't work.
- ALIX HUNTSMAN I'm still managing restaurants in my head when I go out to eat. Like the other day I went to [Restaurant F], and they had some beer topped with a slushy. But they didn't switch the line so the beer tap was like, all the way down there. But the slushy machine is over here. And I was like: So why didn't they flush that line? Move that keg closer to the slushy machine. Who's idea was that?

NANCY CANNON So our birthdays, my husband and I, our birthdays are ten days apart so we always just do, like a big birthday thing. So we went to [Restaurant G] and I had never been before. Have you been? It's like watching a ballet.



- The way they just, they all come and they clean, and they bus in NANCY CANNON (Cont.) like seconds. And then your food just comes, there's no communicating. They all just work together. It is literally like watching a ballet. That is record consistency.
- So, you said something earlier about how restaurants are well **MODERATOR** oiled machines, and everything stays the exact same. Yet Orderly is in the business of getting restaurants to change the way they do things.
- Yeah, I mean, I think it's like getting rid of, or being willing to let MATT O'NEAL go of processes that you think are beneficial, but probably aren't.

I don't care who you are, if you're taking full inventory you're gonna have inconsistent counts. So if you're sitting there fooling yourself into thinking that I take a really consistent inventory. Right? You, You're gonna be off by 300, you, well depending on how much wrong, you know, it's gonna be \$300, \$400, \$500 you know, pure variance that's just out there. If not more.

Well, and there, but there's a reason for that too. Because even NANCY CANNON the most consistent restaurants, you're still gonna put a little too much of this on the plate. A little too much pepper in whatever sauce they're making. A little too much ... it's never going to be perfect across the board. So that's why we talk about, you know the theoretical versus the actual.

ALIX HUNTSMAN Yeah.

KASHROUBAS BROS.

NANCY CANNON It's never going to be what you want it to be. And I know, at [Restaurant E], we would get there at 4:30 in the morning on Monday's.

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Every Monday. And we would count until about, until we were finished. And then we would spend the rest of the day in the office trying to tweak our variance to where we wouldn't get yelled at. Because it was so ridiculously off.

- **MATT O'NEAL** Yeah, you're just sitting there fudging the numbers.
- **NANCY CANNON** Exactly! You had to. Otherwise, they're up here saying "what are you doing" when really it's, you know, Bob over here messed up the queso, so we had to throw a whole batch out. Didn't put it on the waste log, and forgot about it. It's just, it's human error. It's not ever gonna work. It's never gonna be 100% accurate.
- ALIX HUNTSMAN Agreed.
- **NANCY CANNON** And you can include Orderly in that well-oiled machine. You've got someone putting in sales, you've got someone setting the budget. And it will save you a
- bunch of time, and

money in the end.

- MODERATOR Looking back on what on your experiences in restaurants, and I'm going to kick this over to you first, Alix. What feature of Orderly do you wish you had?
- ALIX HUNTSMAN So my first GM job was this like Mom n' Pop restaurant, and I was in charge of all the ordering, and then breaking down all the invoices with them, which was awful by the way. And in charge of like, just, all the little things they are ordering, like, I didn't know that I could have called one produce person like, "Hey. How much for a piece of bok choi?" Then call another and be like "How much for a piece of bok choi?" If I had Orderly, my life would have been a lot easier. Just knowing that could have stopped sitting there with like 20 different excel spreadsheets.

My old boss, he loved spread sheets. On the spread sheets we had our own running log, like all of our codes and which ones we are using the most. If I had Orderly, that nightmare of me trying to remember which sheet I didn't use or where to save it and who to email it to would have been eliminated. Because it all would have been right there on the internet.

And having, you know like having a RFI would have been amazing.



NANCY CANNON Right.

- **ALIX HUNTSMAN** I was 22 and really confused. Just having Orderly I feel would have like guided me a bit.
- MODERATOR Same question for you, Kyle.
- **KYLE FAUCHER** The biggest thing for me is the being able to track prices and you get to see them always. I was the one keeping those, I was looking at those invoices every week to see the price fluctuation. But, you are gonna miss something, we all do, man. You go back and forth, you're looking at pack sizes. You're trying to figure out does this make sense? Do we buy from this guy or that guy? Whereas with Orderly you kind of get that historical background so that would save a ton of time, a ton of effort. It would have been a much more efficient use of my time. And, you know, I hate doing inventory.

I was lucky enough to always have someone who was great at doing inventory. I did spreadsheets for it. But the fact that I can get weekly numbers on those costs would've been enough for me.

MATT O'NEALProbably the most valuable thing to me is kind of how it lets you
not have to try to keep all the things in your head around pricing.

You don't have to sit there and say okay, you know, last week I talked to, you know, supplier X and we talked about my ribeye, and, you know, we locked in a price of 8.99 a pound for the next three weeks. And so I should be getting it at 8.99 a pound. Right? And having a product that could basically, not only allow you to put an alert in, then if you receive an invoice, and you don't have to look at the invoice, you just take a picture of it.



MATT O'NEALThen the next day, you should get an alert if you've set that price
alert. That, hey, your ribeyes getting in today were 9.20 a pound.
It means a phone call to my rep to say, "Hey. You know, we
agreed, 8.99." That's really valuable.

The really funny thing is, I've found there is some malice. There is some gamesmanship that reps will do.

NANCY CANNON Oh, yeah. Yeah.

MATT O'NEAL On things like that. But, at the same time, there are also a lot of just mistakes.

ALIX HUNTSMAN Yeah.

MATT O'NEALRight? Because if you think restaurant software is bad
sometimes- the software that suppliers use is nightmarish.

I used to have a contract price on butter. And every single week, at the exact moment, my rep for a big broad liner, had to go in and change the price manually. Otherwise, my Sunday through Monday order would come out and I would pay 20 to 30 dollars more per case for butter than I was supposed to. And it was a big deal of, "Hey, this came in at the wrong price again." "Oh, I'm sorry. Did it get in at the right time?"

Also, just being able to see kind of where you're at versus the market is super valuable. A lot of chefs don't realize that you don't have to be at the bottom of the market.

MODERATOR Right.

MATT O'NEAL

You can buy high quality product, but you shouldn't be a complete flatline on your product. The market's going down, your price on your high-end product should be following the market. And it can drive conversations where you're like, "Listen, I love this product, but everybody else is all the way down here in the basement.



NANCY CANNON Mm-hmm (affirmative).

MATT O'NEAL So driving those conversations, which are conversations that I used to have all the time. And then honestly, having kind of a running weekly food cost and knowing based on the budget how much I needed to spend ... I used to do all that manually, every single week.

ALIX HUNTSMAN Yeah, same.

MATT O'NEALAnd it was a giant pain in the butt. Because you had to go in and
enter in all of your products. Or not all of your products, but at
least enter in your invoices.

ALIX HUNTSMAN Yes.

MATT O'NEAL And then, you'd look at it and go, "Okay, where am I at and how much have I spent? How much have I usually spent at this point in the week?

NANCY CANNON It takes hours. I don't just ...

MATT O'NEALIt takes a long time. I hated the amount of time in the office,
between ordering and, you know, data entry, and all of these
various things that I had to do, I'd spend two hours in the office.

NANCY CANNON Minimum.

ALIX HUNTSMAN Right.

MATT O'NEALSo it was just kind of a nightmare. Entering all that in Orderly
solved a lot of those problems. Um, which I will gladly grant
Orderly control over it to save myself about two hours of trying to
look at things every day.

NANCY CANNON I love the, the ... So, at [Restaurant E] we used this system. It was just like Orderly. Except we had ... I was line itemizing our own invoices. So they would come in and I would individually put the lines in. What it was, what we spent, what the pack size



- NANCY CANNON (Cont.) was, all of it. And then, that's when we got our variance. Cause we put the recipes in for that and it was all off, compared to what we did. So the paperless in waste management would have been huge. The not updating the prices on spreadsheets from when you go do inventory is huge. Cause I did that with liquor, every week. You know? I was updating every ... Any time I would get an invoice.
- **MATT O'NEAL** As a chef, you would have basically just updated the prices on your proteins and been like, "That's it. That's enough."
- **KYLE FAUCHER** That's good. (laughs)
- NANCY CANNONYou were active. But any time ... So every Tuesday, from 3:00 to5:00, I would sit in the office and update prices on every invoice
that came in.
- **ALIX HUNTSMAN** Oh, my god.
- **NANCY CANNON** That was a nightmare.
- **KYLE FAUCHER** Yeah, it was just for alcohol.
- **NANCY CANNON** Just for alcohol! You know, my chef was doing other stuff.
- **KYLE FAUCHER** And there's not a lot of variance in alcohol, generally. But ...
- **NANCY CANNON** Not a whole lot. But sometimes, especially if you hadn't ordered it in a while.

KYLE FAUCHER Yeah.

NANCY CANNON But those couple pennies, you know, matter. So, uh, that's very helpful. And then, it ... Just the whole, like, the budgeting tool, to me, is huge. Some sort of ... Cause restaurant managers are kind of thrown into that position. Very rarely are they, like, "I've been trained." You know what I mean?



ALIX HUNTSMAN Yeah.

- **NANCY CANNON** Especially for the pubs of the world.
- **KYLE FAUCHER** Yeah. We have a financial background.
- **NANCY CANNON** They're just telling you to kind of figure it out.
- MATT O'NEAL I mean, even when you go to culinary school, culinary math is ... Basic. (laughs)
- **NANCY CANNON** So I think the budgeting tool will be huge for people to set that, here's my guideline. You know? It's a great starting place. I think that's huge.

Oh, and then the time to kind of course correct. And I think that's ... It's a game changer. Honestly.

- **MATT O'NEAL** Ordering with a budget, you know on Thursday about how much more money you have to spend.
- NANCY CANNON Yeah.
- MATT O'NEALAnd you can make a smart decision and say, "You know what? If
we get to the end of Sunday night, and at 10:00 I have to 86, you
know, my, my ribeye, okay. So be it." I'm not gonna order that one
extra case-

NANCY CANNON I'll run out of it. (laughs)

MATT O'NEAL You know, the funny thing when I think about that is chefs are paranoid. Right? You don't wanna be the person that makes the grocery run because something runs out. On Saturday in the middle of service.

Cause that's ... That is a brutal feeling as a manager.



NANCY CANNON Yep.

MATT O'NEALThe really funny thing is, a lot of the times in restaurants, it's the
junior sous chef placing these orders all the time. It's not
the executive chef. It's the junior sous chef. And they don't
wanna be the one that's responsible for that. So they over
order.

ALIX HUNTSMAN Yeah.

- MATT O'NEAL So having the tool that gives them a budget and helps them train on it. They can see kind of what they're ordering. You know what ordering was like last week, and see kind of what their trends are and how much they're spending. People over order. I remember my first order as a junior sous chef. I made some really fun ordering decisions.
- **KYLE FAUCHER** Even with pars, it's still easy to over order.
- MATT O'NEALYeah. You would just over order it, then you look and you'd belike, "Holy crap." You know? "We're carrying...
- **KYLE FAUCHER** A lot more than-
- **MATT O'NEAL** "3,000 orders extra in beef."
- KYLE FAUCHER Yeah.
- **MATT O'NEAL** What kind of special can I run? (laughs)

MODERATOR

So last question I have. If you were given a pedestal and you could talk to every restaurant owner out there, what's the one thing you'd want to tell them? Just in general. Something you would tell them that you think no restaurant owner realizes could make their life a whole lot easier.



NANCY CANNON You don't have to count inventory. You don't have to.

- **KYLE FAUCHER** I think it's more ... Yeah. Get out of your own way. And also, don't be afraid of the technology that we have.
- **ALIX HUNTSMAN** No, really. Don't be afraid of technology.
- NANCY CANNONDon't be afraid. That's a good one. Don't be afraid of technology.And ... But you know what I'm finding a lot, too? If it seems tooeasy, it almost feels like you're not doing it right.

You're, you're initially, like, skeptical about it. So I think I would just tell them trust the technology. Don't be skeptical. There is an easier way.

- KYLE FAUCHERYeah. Just don't be afraid to change and, and use whatever
tools are out there. Because too many people just stick with
what they know, or what they've been told they should do.
- **ALIX HUNTSMAN** Yeah. Don't be afraid of change.
- **KYLE FAUCHER** Original ideas.

MATT O'NEALFor me, it would be, don't be afraid to embrace change. And be
willing to see change through.

Not even talking about software. It boils down to consistency or, or more about building habits. You have to do something for a certain amount of time before it becomes a habit. Right? And in the restaurant industry, changing, building habits, is really difficult.

NANCY CANNON Definitely.



MATT O'NEALCause that's what we all said before, we like things to be where
they were yesterday and the day before, because that makes my
life easier and I don't have to stress out about it. It's my safety
blanket.

But being willing to embrace change, but then also, you know, push through the pain of change. Making a decision for your business around your hours, or what your menu is, or your concept. All of those things.

That definitely applies to technology, cause technology is easy to kind of go, "Okay. We gave it a shot." I couldn't get my manager to send the pictures or I couldn't get them to do this or that or, you know, whatever this may be. Really being able, or willing to, you know, see through to the value that you perceived when you started the process. Whatever it may be.

- **NANCY CANNON** I think it does take 60 days to create a new habit. And then it takes like one day to break it.
- MATT O'NEAL Yep.
- **KYLE FAUCHER** Okay. And that's it. I mean, we're, we're asking you to change a major habit. And that's the hardest thing.
- **ALIX HUNTSMAN** And then we're holding them accountable for the habit that we're teaching them how to do. That's hard. It kind of really sucks.
- KYLE FAUCHERYou know, that's the thing. Like, I know we're changing your
habits. You have to be able to trust us so that we're trying to do

the, the work to change that habit.

NANCY CANNON To get the result.



- And so, when I keep calling you every day, I'm like, yeah. I'll call **KYLE FAUCHER** you every day until you do it. And so that's ... If you don't do it, you don't change your current behavior to what we know will make you successful, you won't stick with us. And I know we have a valuable tool.
- NANCY CANNON Or you won't stay with us and you won't succeed.
- Right. **KYLE FAUCHER**
- ALIX HUNTSMAN You know, you'll go back to the same weird food costs and the same weird whatever we were doing back there.
- And that's just money ... You might as well just light it on fire in NANCY CANNON front of your face.

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