



ServiceTrade & Therma Sync

Katie Mullen with Legence Holdings
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Participants

SERVICETRADE

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Transcript

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KATIE

0:00 Hello?

RYAN

0:00 There. Hey, guys. What's going on?

LAUREN

0:05 Ryan?

RYAN

0:06 Happy Friday.

KATIE

0:07 We made...

RYAN

0:08 Happy Friday.

LAUREN

0:14 It's good to see you. That's...

RYAN

0:16 To how, how's everything been going with the little one?

LAUREN

0:22 Well, she came eight weeks early, but everybody's happy and healthy, so.

RYAN

0:31 Good, good. Yeah, that's when you first said that I was like crap, I'm sorry, I asked, but.

LAUREN

0:37 No, no, like honestly, I was like, we just did a sales training and the sales training that I just delivered. I was supposed to do the day I went to the hospital and my

doctor was like, we are cutting this baby out of you right now and I was like, but I have a sales training today is not plan for this. I was like texting them from the hospital.

RYAN

1:00 Was like, hey...

LAUREN

1:01 Guys, I have food poisoning, like not gonna see you tomorrow, but probably Tuesday, and then that did not happen. So.

RYAN

1:08 Yeah.

KATIE

1:08 That was exactly one minute, it was.

RYAN

1:11 Like not...

KATIE

1:12 Gonna be in tomorrow, and then the next thing we heard Tim was like, so Lauren had her baby and we were like...

RYAN

1:20 Well, I'm glad that everybody's healthy and happy that's off.

LAUREN

1:25 Best time. Thanks, Ryan.

KATIE

1:31 Man.

RYAN

1:33 Right. I think that.

KATIE

1:34 Genie...

RYAN

1:35 I have not met genie.

KATIE

1:37 Okay. That's what I thought.

JEANNIE

1:41 Me too.

RYAN

1:43 Good to meet you, Jeannie.

KATIE

1:46 Genius. Our implementation wizard.

RYAN

1:50 Perfect.

JEANNIE

1:51 Working closely with Chris and Daniel and Tom, so.

RYAN

1:57 Well, awesome. That's quite a cast of characters.

KATIE

2:00 Crew.

RYAN

2:01 Yeah, quite the full spectrum of personalities for sure. So.

JEANNIE

2:08 A good team. We're rocking and rolling so, this...

RYAN

2:12 Awesome.

KATIE

2:14 Yeah, Chris e-mail saying he's running a few minutes late.

RYAN

2:17 I was gonna say, I think I feel like he should be here. I did. I chatted with him a little bit earlier today and so, things sounded very positive. So that's good.

KATIE

2:27 Good. We like positive you were talking with him about the implementation or what were you talking about?

RYAN

2:34 Well, we talked about the implementation, among other things. There's some stuff going on in brewing some reorg and the legion family that's taken place so, yeah, I...

KATIE

2:45 Mike this morning, and he said that it's been announced that there, so Cal is rolling into a read.

RYAN

2:55 Yup.

KATIE

2:57 And then I've also been in contact with the guys over at San Jose boiler.

RYAN

3:04 Right.

KATIE

3:07 I know Tom is interested in kind of sharing resources, and sharing tax across those two locations. So sounds like all good things.

RYAN

3:19 Yeah, that, the read move is going to be game changing for us in that southern California market. And so, where thermo southern California couldn't go out, didn't have the resume and the pedigree to get a 20 30, 40 50,000,000 dollar job... that would have taken five years probably to get there, right? You gotta kinda just in your way up to being capable of that stuff. In this case, it's like game on like let's go get, you know, ground up 40 50,000,000 dollar projects like tomorrow if we want to, you know. So it's pretty exciting. You know, from where I sit too, and driving all of our cross sell like it's huge, right? So, I'm very excited about it. I was there on Monday for five hours. It was, so I got to tour the, a red facility real quick, meet Dave Clark and their president, and then get out of there. So.

JEANNIE

4:21 I get to the norco this week of all the... metal works going on. That was cool.

RYAN

4:32 Yeah. Some cool stuff. Did you enjoy our art display as well? How was that?

KATIE

4:39 She almost missed it almost walked right? Bye.

JEANNIE

4:41 I know it was hard to... then catch attention.

RYAN

4:47 Something else like.

JEANNIE

4:49 The Maryland monro, like cabinets?

RYAN

4:53 Yeah, yeah.

JEANNIE

4:53 I did enjoy those too.

RYAN

4:55 Yep. You guys actually, you guys even didn't get to see it all of its glory. So, we used to have weird art on every wall in that place. And so, the owners, the original owners, the founders, when they, you know, sold the business, it went on for a little bit. And then all of a sudden, I came into work on a Monday morning. It was like, where did all the art go? Well? Nicki threw a fit and took all the art back. So she came and picked it up and it was like interesting. So we had some weird art too. Let me tell you so anyways, hey, Chris.

JEANNIE

5:32 Cafeteria was still hard to pack that up and take it with you. That was, that was cool as well.

RYAN

5:38 Yeah, yeah, it's something.

KATIE

5:43 Hey, Chris. This is going.

JEANNIE

5:46 Hi, I...

KATIE

5:50 No worries. Well, so I basically wanted to just get on the phone with you guys kind of, you know, Jeannie and I were on site on Wednesday so we can kind of share what we learned and, some initial thoughts from some of those trainings but really

just wanted to get an idea for what you guys have been hearing, and how you know, things are going from your guys perspective. Chris, you probably have a little bit more. You've been in more calls with genie and whatnot, but would love to just hear from you guys on, you know, what some maybe early wins are if there's anything that we should be aware of now that we've officially kicked off the pilot, they're at thermo or Cal.

KRIS

6:37 Absolutely. And so far and I've pulled around and spoken to several people just to see what's the word on the street. One of the things I've been worried about is people's you know, paying compensation, being screwed up or ours being screwed up. And so far we haven't run in that problem yet because I guess they haven't done a full pace like yet. So to be determined on that, I think, the thing that people are probably most upset about is that we haven't added more clients. So they're like, well, why isn't this client on? Why isn't this building on? It's like, sorry, this is a pilot. We're only limited to this. So that's I think that's a good problem to have. But I think overall, everyone who's involved in the process from, you know, quote to cash basically knows their role, knows what's going on has had a chance to, you know, figure out how to interface with the systems and what data needs to go, where, and what triggers caused them to, you know, need to work in whichever system. So I think that's been thoroughly rock drilled right there. So so far it's, the feedback I've heard from Tom from Daniel. The lack of feedback from Ryan been good. No eventful even.

KATIE

8:02 Good and even fully is good in this.

JEANNIE

8:04 This.

KATIE

8:05 Situation, Ryan, have you heard anything from anyone? What is your?

RYAN

8:12 So, I haven't heard from any of the text which is, I think is a good thing because when we launched is my phone blew up and I got a lot of what the hell make this stop? What can you do, you know, I will say on the, so no news is good news there. On the positive side though the implementation process like, the folks are on our end involved in that, Tom, and Chris and everybody else even downstream it out a little further have been super impressed relative to what they've experienced. And so, I hate to break it to you guys but the bar was so damn low, so you had a really easy task, you know, but yeah, no, it's everybody's been really complementary of the situation and the process. I know I just talked to somebody that I guess, they had a little peer group service management call and some of the other business units are like, what the hell? Like, why do you guys get this first? We're ready. So it's exciting, you know, hopefully this pilot works out and, you know, ready to move forward into the, a larger organization. So.

KATIE

9:21 Yeah.

KRIS

9:22 What I think that hasn't gone so far from san and boiler because so far I've heard positive feedback but I don't know the specifics.

KATIE

9:31 I'm sorry, what was the question?

KRIS

9:33 What feedback have you heard from san boiler? Because I know that you guys give a demo... it was received positively.

KATIE

9:42 Yeah. So it actually worked out perfectly. I went out on site with them the Tuesday before I met with the group at Therma and we did a demo for them. And then today, we had two follow up meetings to go over, you know, the Quickbooks integration as well as go over partsledger for some of their inventory management and tracking. And I think initial feedback, is really positive. They seem really excited about it. Ryan, who is one of, the guys that's been in most of the conversations with us. He remembered a lot of stuff from service trade and was telling us that when they initially made their decision, that service trade was in one of, the finals and things, but there were certain portions that weren't at the time built out, but we've addressed them since then. So I think all in all the feedback from them has been pretty positive.

KRIS

10:48 Okay. I think that is an account that we could get set up sooner. Okay? So Ryan connely is, their CEO and post acquisition the deal a payment is. He's going to transition out... around at the six month mark. So we close in August first. So he's right about the halfway point. And so I was thinking, this implementation of service trade could be a really good sort of last contribution from Ryan before he sort of slips off to his next adventure. And Steve, I think Steve campo feels the same way as well.

KATIE

11:35 Okay. Yeah. That's that's good to know we didn't have that insight.

KRIS

11:40 I like them up as like the point person to do all the integration and the data and make sure it's like it's up and running in the.

KATIE

11:49 Yeah, that's silly. What we.

JEANNIE

11:54 Sorry, when is the six month mark up? What? Because I'm assuming that will inform when we want to kinda launch by then.

KRIS

12:00 Yeah. So that will probably be February first and I like sort of a consulting role.

JEANNIE

12:08 Okay.

KRIS

12:09 Yeah. And then the other one that's got that we have going on which I think you're aware of by now is the, our southern California office transitioning to a red. So that's about, I think 36 tests... and then maybe 10 sales people. Now, they're not, they're planning on just going over to whatever a red is using. I know that's not the latest version and I know they're not on Northboundary. So that is something that, that's the work stream that I'd like to kick off as soon as we can really, probably, I guess probably after thanksgiving.

--- Implementation and ongoing support ---

KRIS

12:53 But yeah, we introductory calls next week that could even just get the ball rolling a little bit just to help them understand what kind of data they need. But, their data set up genie is different than nor Cal and like they're not running on the same templates. I think everything they have is supposedly an is... may or may.

--- Implementation and ongoing support ends ---

JEANNIE

13:19 How is exporting out of ifs? Because I feel like we went the workbook route because there was, there wasn't a lot of confidence in the accuracy of the data in ifs?

KRIS

13:31 Right, right. So, I mean, I think they probably feel confident about the data they put into is, but whether or not we can extract that data in a form that, that's useful to us, I don't know. Yeah, once they understand once the local team understands what the data needs to look like to go into service trade, I think it'll get a better understanding of, the effort that it's gonna take.

JEANNIE

13:57 What is your timeline expectations around? So Cal with ao read?

KRIS

14:04 Well, with this, I realized that getting all the systems up and running could take a little bit longer and we might have to take sort of a phased approach. We are, they are going to be considered part of a read beginning one one 2024...

JEANNIE

14:21 Okay. So.

KRIS

14:23 That means, you know, benefits and payroll four O1 K. All that stuff is gonna be switched over to a, or, the systems that might be, that could take a little bit longer.

JEANNIE

14:40 Do you, from a prioritization standpoint, do you see getting so Cal on a red... or all of nor Cal expansion adoption taking precedence? Cause I have a feeling after our onsite that the feedback that you're hearing which is the, why not my customers is going to balloon very quickly. Just the account managers are like, you know, when they're gonna see, the experience for their customers and one has it and the others don't I just anticipate that demand is gonna start. People are gonna start chirping.

KRIS

15:22 Yeah, are...

JEANNIE

15:22 Loudly.

KRIS

15:24 And Tom is going to have to put together a small army to, you know, to create or to make sure that the data is in a format that, we can set it up and that's just gonna take a little bit more time. So, in the meantime, at least we've stop the bleeding with what looks like, the twist roll out imminent.

JEANNIE

15:42 20 seconds. Still, right? Is that the, are we on plan on track?

KRIS

15:47 I'm not sure Ryan.

KATIE

15:48 When I spoke to Mike this morning, he said that as of yesterday, it is fully stood up. I don't know that they actually released it to people yet, though.

RYAN

15:59 I know, the word on the street is that's gonna be after thanksgiving. They're gonna go in one of the like the weekend of the second or whatever it is or first they're gonna go in, get it turned back on fired back up. And then that Monday, right? They'll they'll back into it is what it sounds like is the...

KATIE

16:19 Yeah, that's pretty much what Mike said but from a resource standpoint, it sounds like everything is done on the twist side. So there might be an opportunity for those resources to be now dedicated to service trade before the.

JEANNIE

16:37 Especially for the integration component, right? Is getting the it team pivoting. Is that what, what's the thought? What are the thoughts there?

KRIS

16:47 I'm not sure whether the it team is gonna pivot to service trade or trying to recover whatever they can from, is, my gut tells me that it is just gonna try to double down on is, but I...

RYAN

17:04 I think, yeah, I think they are by the way and I think that decision is gonna get taken out of their hands pretty quickly here. And I also, by the way, I'm gonna steal their integration team back from this mess because I need them to finish the Hubspot integration. So there's about to be a little bit of an it business war, that's gonna end too. So.

KRIS

17:26 But, but before I think we do, we expand the pilot or do a bigger roll out in norco, we probably need to start using those it resources to automate some of, the manual touch points between ifs and service trade because that will be hard to scale as we add more clients on it's. Just gonna be like, so there's going to be so many manual hand offs and the system is just gonna be right, for error.

KATIE

17:56 Yeah, yeah. I agree with that. So one thing that I talked with Mike about was the possibility of getting something signed off for like the all of them nor Cal as well as the headcount for thermaso Cal, getting into a read and then also getting a read upgraded into the enterprise version, right?

--- Implementation and ongoing support ---

KATIE

18:25 And I think that once we have that in place, that's gonna open up our resources to be dedicating that time to, the integrations and everything that you're saying because essentially, what would happen is you would have a new implementation window and you would get genie for another three months, and she would be able to start taking on, those parts of the project.

--- Implementation and ongoing support ends ---

KRIS

18:50 Okay.

KATIE

18:51 Kind of...

JEANNIE

18:51 You...

RYAN

18:52 Guys...

KATIE

18:52 Are seeing.

JEANNIE

18:55 We can phase the efforts, right? So if we wanna focus on one area first, I think to Kate's point, we're trying to plan for my team, at least the onboarding implementation. And me specifically, we're trying to plan out my capacity. And so if we've got, you know, the commitment here this year, we know that we're you know, moving forward with all of these technicians and this plan, we can continue to, you know, come determine these timelines and maybe a phased roll out determining, you know, based on prioritization.

KRIS

19:28 The first time would be so very read.

JEANNIE

19:34 Okay.

KRIS

19:35 The, that's probably the most urgent.

JEANNIE

19:38 Okay.

KRIS

19:39 And section would be the San Jose boiler implementation. And the main thing that's driving that time line is we just want to take advantage of Ryan while we have them. So it's probably not gonna take as long as, the firm reallocation did. And then yeah, or would probably be any expansion. There would probably be 2024. We'll we'll have our board meeting in mid December. And so there, we'll make the case for a bigger investment. And then I think I'll be after this board meeting, I'm to be doing more of like a formal due diligence because, we wanna be able to show the investors that we have gone through and done a very thorough requirements assessment and then very objectively looked at all the alternatives and in a quantitative way sort of rank them and evaluate them like, you know, a formal diligence process. I think we

all know, I think what the answer is, but we wanna be able to show our investors like these are the steps that we've gone through because I don't think that was done very well for ifs, and we wanna be able to tell investors like we made the best choice because cause we did all this research, we looked at all the competitors and this was the best tool. So that is going to be its own process. And, I would think that we need to do that before making, a bigger roll out, in nor Cal and nationally... which I have a question for you. Do you guys have like a rubric, that you use for like requirements assessment and evaluation?

--- *Purchase decision* ---

KRIS

21:35 Just likes to think about how you stack up against, your competitors. We, I have one internally and like the requirements assessment, but I'd like to make it a little more thorough.

LAUREN

21:49 We don't have anything boiler plate. If you wanna share what you have, we can have a look and then... kinda let that determine maybe what we do from there again.

--- *Purchase decision ends* ---

RYAN

22:08 What about this feature matrix that Billy sent me?

KRIS

22:13 Yeah, have.

LAUREN

22:13 You seen?

RYAN

22:14 Have you seen that? Chris?

KRIS

22:16 I've seen the record?

LAUREN

22:19 Have someone update that thing? Because the last time I saw it was like way out of date?

RYAN

22:26 Well, you tell me he sent it to me?

LAUREN

22:32 I'm talking to him after this so I can ask him.

RYAN

22:35 Okay. Yeah. I don't know when it's updated, but it's pretty, it's a pretty comprehensive list of all, the features. So, we were, you know, when we talked to Billy, we were gonna use this to kind of evaluate ifs and stack the two up side by side... but yeah, it's a pretty comprehensive list. I gotta say... Chris, I can send this to you.

KRIS

23:05 Yeah, I...

RYAN

23:06 Can add it right now... 263 rows that's not too bad.

KATIE

23:14 So, Ryan, from your standpoint, do you think that would be what Chris is looking for?

RYAN

23:20 Yeah. I mean, I don't know Chris, I think you wanna compare feature for feature kind of what our goals are or what we want to get out of it and what the different softwares you know, offer, right?

KATIE

23:32 That's usually what we're seeing more of, is customer or prospects will come to us with, hey here's what we're looking for and then going about it that way versus us having like a standardized thing that we send out if that makes sense.

RYAN

23:47 Yeah, because, I will tell you guys and I don't even know if, you know this, but service tighten is owned in a black stone fund. So, I'm serious like they have been pursuing me, very, heavily. So, their blackstone fund own, they got connected to us through that. And so, we, you know, we need to figure out obviously the delta between the two because the good news for you is blackstone just makes the suggestion they don't you know, force us to use particular things but it's a compelling leverage point for us on a broader, you know, scale to say like we're in the family, so.

LAUREN

24:29 Yeah, bye.

KRIS

24:30 To...

LAUREN

24:31 All right. Go ahead. Chris.

KRIS

24:33 It's probably just like a minority stake in a high growth company. And so it's they're not gonna have a lot of, they're not gonna have a lot of influence or care about putting their thumb on the scale at all, but not that they ever do that really.

LAUREN

24:49 Yeah. I think from the comparison standpoint, we'll be happy to look at your sheet. I think our sheet is somewhat comprehensive. I'll try to figure out what Billy sent you, but I think you'll find some of the initial reasons why thermo came to service trade in the first place for the customer experience that's really where we shine from a commercial standpoint. So, so, we can definitely, we can definitely look through this.

KRIS

25:20 Yeah. Here's here's, some of the things that we've had... which I plan on this formalize a little bit more, but, you know, the customer portal, being able to use it on iPhone... quick quoting. So, these are just some examples that we've had where we just looked at service training is side by side and said this is what, we really need. So this is what I was gonna use as my starting point basically.

LAUREN

25:53 Okay.

KRIS

25:54 But I'm not sure if there's other things that I should take into account.

JEANNIE

25:59 I mean, I'm sure the, well, those are things that you've identified as being important to you. I wonder if I can take a look at this, knowing what I know about your workflows at nor Cal and see if there's additional features that would benefit from being on the list that I know where we shine.

--- Purchase decision ---

KRIS

26:16 Yeah. And I just need to know like, okay, how else do we compare this with the comparison with it? But what about comparisons with more direct competitors?

JEANNIE

26:28 Yeah.

LAUREN

26:33 Yeah, certainly. It's certainly a worthy exercise. If, if I can, if I can kinda say back, what I think I heard, you know, it sounds like we should continue pushing forward with first a read.

--- Purchase decision ends ---

LAUREN

26:46 And so, Cal, San Jose boiler and then eventually nor Cal expansion. And then we should expect to go through the exercise some time beginning of next year with you all of the, you know, kind a side by side comparison is that is.

KRIS

27:02 Yeah, I think we need that side by side comparison before nor Cal feels like, okay, we can, you know, roll this out more broadly and also for the other service businesses.

LAUREN

27:17 Okay. All right. So... what you originally said was, nor Cal would be like a 2024 thing. So we can go ahead and start looking to, in something with the a red expansion as well as San Jose, and then kinda figure out what nor Cal looks like based on, what we collaboratively come up with from like a comparison scale.

KRIS

27:43 Yeah. And I think, you know, if I can get this, maybe I can get this done by the, in December. We'll see, I think either way we just want to be able to tell investors that, this is what we wanna do and why, and this is why we think it's the best choice just so we don't have another situation at our.

LAUREN

28:07 Yeah, totally understand the reasoning behind that.

RYAN

28:11 When...

LAUREN

28:12 We brought...

RYAN

28:12 This up previously, our board chairman, who is, you know, long term industry expert said, well, who else have you evaluated? And when we had nobody else, that was a red flag for him, right? So he's gonna want us to go like Chris said full due diligence process before we can move forward beyond kinda what makes sense in the interim, you know? So.

--- Implementation and ongoing support ---

LAUREN

28:35 Okay. Fair. Well, I think from a resource standpoint, I think genie, I don't know how we'll carve off a read from a resource. We may have to do like a service window for that considering we've got like importing of information into their, you know, service trade instance down there.

--- Implementation and ongoing support ends ---

LAUREN

28:59 So I think I'll need to get with their am on that and maybe it's sort of a cross functional effort. I think San Jose is going to be pretty easy just because they're a little bit of a separate entity. We've already got the pricing hashed out based on what, the thermo agreement looks like and things like that.

--- Purchase decision ---

LAUREN

29:21 And then I think it makes sense to regroup potentially after the holiday, Chris, once you've had the opportunity to kind of put together what you feel the due diligence process looks like. And then we can kinda prepare what you need to go into that board meeting and then go from there. That's kinda what I'm hearing.

--- Purchase decision ends ---

KRIS

29:51 Yeah. If there's if there's more that you would want to add to this like evaluation framework that'll be great... especially if it helps you us think about, okay, everyone knows what, like what their current needs are. But what are some of the additional things, that our service teams don't know about yet? That would be more forward looking things that's something that I'd like. And then as far as your like direct peer group, there's service tighten.

KRIS

30:29 Who is the other one? It was more of a residential thing, think, right? Ryan.

RYAN

30:38 The other guys that have pursued us is like BuildOps. I...

--- Purchase decision ---

KRIS

30:42 But...

RYAN

30:43 Which I know is not really a competitor. They're more full of shit to be honest with you. Actually, I'll be honest with you if I started.

LAUREN

30:53 Why do you think that?

RYAN

30:55 I got a really bad feeling from the BuildOps guys, but like if I was gonna start a residential shop, I would probably run it off service site. And if I'm being really honest, it's a pretty good robust residential product certainly.

--- *Purchase decision ends* ---

LAUREN

31:08 That's what you should do. That's their...

RYAN

31:10 Yeah.

LAUREN

31:10 That's the, yeah.

RYAN

31:13 Okay.

KRIS

31:14 I also see XOY, a.

RYAN

31:18 No, no, we're not even gonna go there.

JEANNIE

31:23 I'm not on the sales. I'm not on the sales arm. So, I don't know as much about our competitors as Lauren and Katie, but I don't even know who that.

LAUREN

31:30 Is a stop gap solution perfect that don't wanna upset accounting.

RYAN

31:36 Yeah, and it's really under developed and over sold. So.

KATIE

31:44 Yeah.

LAUREN

31:44 It's easy for the organizations that don't wanna... have an unhappy CFO.

KATIE

31:51 Rock the boat to me.

LAUREN

31:52 Yeah.

KATIE

31:54 One thing that I will call out in regards to service tighten is they don't have the customer portal.

--- Type of work ---

KATIE

32:02 So they're customer deliverables other than them, you know, mostly being residential that's another thing that I will call out that's kind of a, another bread and butter of ours.

KRIS

32:16 Yeah.

KATIE

32:17 I know for you guys as well.

KRIS

32:20 What about Jobber... right?

LAUREN

32:23 More residential as well? I think they're based in Edmonton and Canada. They're sorta the crown Jewel of Edmonton because not much goes on up there. So, I guess I thought.

KRIS

32:38 In...

LAUREN

32:38 There in oil field... but yeah, they're known for like landscaping and like home services and things like that.

KRIS

32:47 Yeah. All right.

LAUREN

32:51 I mean, I would suggest others for you to look at, but I think those are, the big ones, right? Like considering like best of breed, like designed for service, that those are the, those are the big ones.

--- Implementation and ongoing support ---

KRIS

33:05 Yeah. Okay. Yeah.

KATIE

33:09 Definitely who I'm running into the majority of the time absolutely.

KRIS

33:17 I gotta jump off now, but... things that I have are initiate a call with the so Cal team, and re, genie.

JEANNIE

33:32 We got a pull in the account manager for are probably for that next steps. And then once that's hashed out, then I get allocated to the project basically.

--- Implementation and ongoing support ends ---

LAUREN

33:44 But let me work on that all in that action item. And then Katie is working with an S, a boiler. Our next call with them. Is Monday. Is that right? Yeah, the next, the following?

KATIE

33:59 After thing? Yeah, it's okay. Exactly.

LAUREN

34:03 Okay. All right. So we're up to speed on that and they have, they can make a decision and get that kinda independent of nor Cal term, correct?

KRIS

34:16 Yeah. They're their own PMS?

LAUREN

34:18 Okay. Cool. And then what else did you have on your list?

KRIS

34:29 This so far?

LAUREN

34:31 I wrote down for Ryan figure out the role of the themes it team because it sounds like you want them back for Hubspot?

RYAN

34:39 Yeah. I mean, yeah, we're pressuring them anyway, if they need to, they need to, do, you know, do as I think what we do need to keep them away from those spending time on the ifs product, Chris, so that'll be up to us.

KRIS

34:57 Yeah. Well, if we can feel service away from them, then that's let's say I.

RYAN

35:02 Yep.

LAUREN

35:04 And then sort of a collaborative effort for making the case for the board meeting on.

JEANNIE

35:10 Well...

LAUREN

35:10 I know Mike's working on whatever he's working on there. I think he asked us to prepare pricing for that, and I believe Katie correct me if I'm wrong, he went over some quantities and headcount with you for what the entire thermo organization looks like. And then why don't we go ahead and schedule some time to, review the feature matrix, Chris, whatever you come up with in regards to the evaluation process.

KRIS

35:43 Yeah.

LAUREN

35:44 And then that way, we can arm you with what you need.

KRIS

35:46 Thanksgiving.

LAUREN

35:49 We giving?

KRIS

35:51 Yeah. So what the 28, 29 thirtieth, so good.

JEANNIE

36:01 And...

LAUREN

36:01 Katie, do you have your calendar handy?

KATIE

36:05 Yes... the 20 eighth is going to be hard for me. Sorry, genie, did I?

JEANNIE

36:11 Yeah, Tom, could it make our regularly scheduled weekly meeting on the 20 ninth? Do you wanna absorb that call and cover this topic?

KRIS

36:20 Yeah, yeah. I can do that.

JEANNIE

36:23 Might be just pulled up yours. That might be hard for you. It's at noon eastern, which would be nine your time. It looks like you're blocked.

LAUREN

36:33 Katie and I both have a conflict at that time, but.

JEANNIE

36:37 The...

LAUREN

36:37 Only conflict I have all day.

JEANNIE

36:39 You wanna move it back?

KATIE

36:41 You're talking about on Wednesday, the 20 ninth, right?

KRIS

36:43 I got... but yeah, we'll find a time on the week of the 1,127, I'm good between 1,128 and 11 30.

LAUREN

36:56 We'll...

KATIE

36:56 We'll...

LAUREN

36:56 Send something that.

KRIS

36:58 All right. Thank you. And I'll introduce you guys to so Cal over the weekend.

LAUREN

37:03 Perfect.

KRIS

37:04 Thanks.

JEANNIE

37:06 Okay.

RYAN

37:07 You guys need me anymore?

LAUREN

37:10 I don't believe. So. Should we include you on this invitation?

RYAN

37:16 That's mostly to discuss the north Cal expansion, correct?

LAUREN

37:21 Yeah, to get whatever due diligence, Chris means.

RYAN

37:27 Got it. Yeah. And I honestly think he's being a little bit optimistic trying to get that done by the board meeting on the twelfth.

LAUREN

37:34 Okay. Cause I'm assuming you would have like demos and stuff with the other.

RYAN

37:39 They have to do demos, do feature comparisons, you know, reach out to them, get relationships in order all over the holidays, like I think.

LAUREN

37:47 Okay.

RYAN

37:49 And by the way, he's also integrating the two businesses in southern California together and he's responsible for that, so.

LAUREN

37:57 All right. Well, that's good insight that's good insight to know.

LAUREN

38:06 Maybe we'll block 15 minutes with just him and then level set. It doesn't sound like we'll get an audience unless a miracle happens with like Steve and everybody for like an enterprise wide roll out. So, we'll kinda push that to next year, but we'll focus on the two tasks at hand area. And so, and San Jose boiler, and then we'll kinda go from there.

RYAN

38:31 I would say my advice to you guys would be kind of a land and expand strategy, you know? So, I also think given, the heartburn with ifs, I think we're going to be very hesitant to do expansion more broadly. And that's why, like first, this pilot was kinda like a pilot stupid do the whole thing.

--- Purchase decision ---

RYAN

38:52 And then it's like no let's do this pilot because we really wanna put things through its paces because I can't tell you how many software demos I've seen where they're fantastic and then whether rubber meets the road, not so good, right? And so we want you guys to shine.

--- Purchase decision ends ---

RYAN

39:08 Obviously, we have a, you know, long term use case, in a read so that's beneficial. But, you know, we're talking some substantial headcount, to pull onto this product. So we really wanna put it through its paces, you know?

LAUREN

39:24 Yeah, definitely. Well, we have our marching orders. We'll reach out if we need anything or have any questions, but we'll let you go and have a great weekend.

RYAN

39:35 All right, awesome. Thanks, guys. Appreciate it. Yeah, have a good weekend as well. Talk soon. Bye.

KATIE

39:42 Bye.

The End