



Call with Helm Group - Rick Steder

Tommy Polcari with Helm Group
Recorded on 10/24/23 via SalesLoft, 6 min.

Participants

SERVICETRADE

Tommy Polcari

Associate NorthBoundary Account Executive

PITLOR MECHANICAL CORPORATION

Rick Steder

Mechanical Vice President

Topics

<i>Purchase decision</i>	2:59
<i>Purchase decision</i>	4:10

Transcript

"This English transcript was generated using Gong's speech-to-text technology"

RICK

0:00 Rick setter.

TOMMY

0:01 I'm sorry. Is this Rick?

RICK

0:03 Yeah.

TOMMY

0:04 Hi, Rick, Paul carry with service trade. Do you have a quick minute?

RICK

0:08 Sure. What's going?

TOMMY

0:09 Yeah. I think I appreciate it. I was looking to follow up in a spoke to Brian home the other day and he told me to reach out to you. I want to reach out to you guys because I know we've spoken in the past but the timing wasn't really that good and I wanted to follow up you guys and see, you know, how you guys are currently doing for your, you know, still on perfect where, you know, what things are looking like on the service side.

RICK

0:31 We're actually in a bit, I would say we're right now, we're probably in a hold with regards to any changes as I'm sure you're aware BuildOps acquired perfect ware and kinda waiting to see where, what path that takes.

TOMMY

0:49 Gotcha. Okay. So, are you guys on BuildOps right now?

RICK

0:52 No, we're still on perfect. Where we have been for 20 plus years, I would say. And so that's the current path. You know, we're waiting a little bit. Like I said, see, what BuildOps has planned for that. If it's going to continue to be a stay on application that they will, you know, have on like support for or if they're is to

migrate everyone perfect. Where the BuildOps. Once we get, you know, some sense of that, then we'll start down that evaluation path. I can tell you because, you guys acquired a boundary, correct? Yeah. So we're kinda caught right in the cross here's here where we converted to Northboundary, I wanna say a year or so ago and have that up and running. So we're leaning pretty heavy on Northboundary on the resale, and the CRM side of it. And we, we're pretty deeply entrenched and perfect were on the operation side of it. So, the industry has presented us with a little bit of a dilemma here because, I suspect that the Northboundary integration is going to be best with service raid. And I'm guessing that the migration path from perfect, where to BuildOps is potentially going to be smoother than to another competitor. So... lots of discovery in our future.

TOMMY

1:19 Right.

TOMMY

1:24 Yes.

TOMMY

1:43 Gotcha.

TOMMY

1:48 Right.

TOMMY

2:08 Sure.

TOMMY

2:11 Yeah, yeah. I definitely understand where you're coming from and, you know, it obviously makes sense to, you know, take a look at both BuildOps and service trade. You know, I was reaching out because I want to let you know that your territory manager, Michael, he's actually going to be in the area. So he wanted me to reach out and see if you guys might have time, either, you know, towards the end of this week or the beginning of next week for him to drop by, you know, introduce himself. And then I was also curious, are you guys at the msa conference down in Florida?

RICK

2:38 Yeah, in fact, we've got a few folks that are down there, and I just talked to my boss who's the president of the service division and I believe he has a meeting set with whoever it is from your group sometime this week, at the conference.

TOMMY

2:55 Okay. So he's spoken to them and he's gonna be meeting with them at the conference.

--- Purchase decision ---

RICK

2:59 Yep. I talked to him a little while ago this morning and I think he's been, you know, he's been at your Booth and I think he's they've been doing some one on one or there's another big perfect user that's out there with him. I believe that they're doing some sit down with the different offerings and, you know, much to the same and that you and I were just talking about trying to, get a path, for us and see how we're gonna, how we're going to evaluate this thing and what, and when we're going to do?

--- Purchase decision ends ---

TOMMY

3:29 Right. Yeah. Okay. That makes sense. Do you mind me asking that person's? Name? Just so I can, you know, relay that we spoke?

RICK

3:37 Yep. His name is Jeff McCoy.

TOMMY

3:39 Chat. Okay. All right. Perfect. And then, you know, like I said, Michael is going to be in the area, so he would love to, you know, stop by maybe later this week, introduce himself, kinda learn a little bit more about you guys and, you know, see if, you know, set up something for the future. Possibly he does have some I'm sorry. No, I was just gonna say that, he does have some time open later this week around like on Thursday morning around 10 am Eastern Time for him to stop by in the office. Would you be available for that?

RICK

3:54 Go ahead. I'm sorry, no.

--- Purchase decision ends ---

RICK

4:10 I think I'd like to defer that, and first and foremost, because Jeff will still be out of the office at that time. So, I'd like him to be part of, any visits that we have, and we're kinda running this from a couple of different fronts. So that feels a little premature to me to have him stop in the office right now or this week.

--- Purchase decision ends ---

TOMMY

4:31 Okay. All right. Gotcha. Yeah, I totally understand that. Well, what I could do is, you know, possibly I can give, you know, Jeff a little bit more time to speak to the guys down there, at the conference and then if it be all right, I could, you know, maybe give you a call back next week and see if we can find a good time for Michael to stop in the office.

RICK

4:48 Yeah, that'd be fine. I just don't want to double up because there's a decent chance that Jeff may arrange. I think that's going to be our next up regardless and I don't want to set something up with you and then have Jeff set something up with the folks that are at the conference and, we just double down on it. So I'd like to hold until we can coordinate, we'll get all of us, in the same group and then we'll find something that works for us and possibly for Brian and myself, when he gets back?

TOMMY

4:56 Right.

TOMMY

5:02 Right.

TOMMY

5:04 Yeah.

TOMMY

5:15 Right. Okay. All right. Perfect. Well, then we'll give Justin time and then what, right? Sorry, would it be alright if I followed up with you next Tuesday around the same time like 11, 11 30?

RICK

5:26 Yeah, that'll be fine. And, if you want to send me an e-mail I've got all your contact info. And then if Jeff checks back in, and they're starting to put something together while they're down there, and I can keep you in the loop on that as well.

TOMMY

5:32 Sure.

TOMMY

5:40 Yeah, sure. We'll be the best e-mail to reach out.

RICK

5:43 Rested, at help dot.

TOMMY

5:47 Okay.

TOMMY

5:50 All right. Perfect. Well, I will send over that e-mail but I appreciate you taking the time to speak with me and follow up with you next week?

RICK

5:55 Yep. I'll forward that on to Jeff just to let them know you and I spoke, and then I'm assuming you're gonna do a similar thing internally on your side, and then we'll get everybody kinda circled up, and get some figured out to get it on the books.

TOMMY

5:59 Okay.

TOMMY

6:06 All right. Perfect. Sounds good.

RICK

6:08 All right. Thanks.

TOMMY

6:09 Yep. Have a good one.

RICK

6:10 Yup. You too. Bye.

The End