



# **ServiceTrade Updates w/ Matt of AMS**

Matt Hetrick with AMS Mechanical Systems - Headquarters  
Recorded on 1/29/24 via Zoom, 12 min.

## **Participants**

### **SERVICETRADE**

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*Field Manager*

### **AMS MECHANICAL SYSTEMS - HEADQUARTERS**

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# Topics

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# Transcript

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

MATTHEW

0:00 Up, Matt, can you hear me?

MATT

0:01 Can, yeah, can you hear me? All right?

MATTHEW

0:03 Yeah, man. All good.

MATT

0:04 How are you doing?

MATTHEW

0:05 Good, Manu.

MATT

0:07 Is that a uvm shirt?

MATTHEW

0:09 Yeah. My brother went to uvm. Did you go to uvm?

MATT

0:11 I did not, but I'm from northern Vermont. Uvm, was like, you know, 20 minutes for me. So, a lot of people that I went to school, went to uvm.

MATTHEW

0:19 Yeah, man. I'm from not too far away, and I'm from saratoga. Both of my parents went to plattsburgh soon.

MATT

0:27 Excellent. Okay. Yeah, familiar with people say that they're from new York and I'm like that's next to Vermont, where are you? But new York is huge. Plattsburgh is like the only one that I really know.

--- Pricing ---

MATTHEW

0:37 Yeah, yeah. Would you listen to weqx growing up?

MATT

0:40 That 99, the buzz was another one, 95, triple X. I don't know if you guys had that over there, we.

MATTHEW

0:49 I didn't get that eqx, we just started to E, I mean, I went to rpi... you know, try not too far away. So... can you hear me? Yeah.

--- Pricing ends ---

MATT

1:06 I can, it's skipping out on me. I, it's probably my internet, I'm in the office. A lot of people are today, so it's probably bogged down. Yeah.

MATTHEW

1:12 It's all good. Yeah.

MATT

1:13 It's saying my connect. All right. It'll probably be good right now. I think I got you.

MATTHEW

1:19 Sure.

MATT

1:20 Yeah, it's a small world. You don't usually see a Vermont stuff outside of Vermont, so.

MATTHEW

1:25 You don't yeah, I mean, my brother is in the army. He was in romania last year and like randomly on the army base they were at, he found another guy that went to uvm and they were on a volleyball like team on base together. So it's just small world stuff, right? Yeah.

MATT

1:42 Nice.

MATTHEW

1:44 It's said on, I know we only got.

MATT

1:45 In and out again.

MATTHEW

1:49 You wanna kill your video map? Maybe that's doing it?

MATT

1:53 I'm gonna kill the video.

MATTHEW

1:55 Yep.

MATT

1:56 For that, yep. Yeah. So... and let me know if I cut out at all. If it continues to happen, I'll just pick up the phone and give you a call. So you still got me?

MATTHEW

2:09 Yeah, I got you. All good.

MATT

2:10 Okay. So yeah, I was working on the pricing and the tech count, the sales account is all really easy to do. The big question mark that I came back to was the accounting integration piece and I believe, you guys met our director of accounting partnerships, Tanya any. And so, I was trying to get with her but she's been out with COVID and then between that and HR, we just didn't connect until late last week. And so it sounds like where things have kind of paused at the end of last year was, hey, our usual spectrum integration that works for most of our customers, doesn't look like it'll work you guys.

*--- Purchase decision ---*

MATT

2:54 And I think the next step was to... regroup and kind of determine what would make the most sense for you guys from a data transfer perspective. And I know the first time you and I talked, you know, you had come to terms with it. Okay. We're we're good with that.

*--- Accounting integrations ---*

MATT

3:14 But I think the last time we talked, you maintained that one of, the primary decision criteria for you guys is the spectrum integration. So I just kinda wanted to touch base on that, and see what you guys are thinking. What you need is that still a critical component like a deal breaker?

MATTHEW

3:37 Sure. So yeah. I mean, our ERP integration is a critical component, right? We need to be able to track our pnl and whatnot... what we discovered in evaluating two more platforms is at least one of your competitors team says have a pretty robust integration to spectrum that would allow us to maintain job based cost tracking.

--- Accounting integrations ends ---

MATTHEW

3:58 So, I know it can be done, from talking to their team and everybody uses the same third party integrator, revit whatever data exchange, whatever it might be. So we do need to move forward with being able to integrate to our ERP. But, our users did like your platform. So I don't know if you can talk with your, you know, ERP integration expert, and see if it can be done. You know, our setup remains the same multi company. You know, we're not necessarily looking to process payroll through ServiceTrade but we do need to be able to job cost and work on inter company jobs without a sub contract that I think was the hiccup. So maybe that clarification can offer some clarity to your team.

MATT

4:46 Yeah. So I already have an idea of which competitor is claiming this, and this actually came up in my conversation with Tanya. She said the same thing that riot is who we use, in Martha. I forget her last name, but Martha who you guys also met with. Yeah, Arthur is good memory. She's either part was part of rivot or works closely with rivot. I'll have to double check that, but... it's interesting that we use rivot, they use rivot, they say it's possible and we're kind of tapping the brakes and trying to be realistic about the expectations. So I can take this information back to Tanya and do a second lap on this, but... that kinda seems a little bit like a flag to me. Now, did you guys actually see, the integration? Like what was, your vetting process around that conversation or was it just kind of a, yeah, we can do that?

MATTHEW

5:53 No, it was a very deep dive with just our accounting team for about almost two hours with their inhouse integrator, if you will.

--- Accounting integrations ---

MATTHEW

6:01 Who seemed extremely familiar? I mean, but let's just, we'll be open. It was BuildOps. They seem to have a pretty robust integration to spectrum available. Now, we still have to that it by talking to two customers, which is what we want to do with you guys too... but I would like to be able to move forward at least on a pricing evaluation.

--- Accounting integrations ends ---

MATTHEW

6:20 So we can kind of narrow the field and do that discussion with customers. So I don't know if you can have that conversation with Tanya, and Martha in parallel to doing this, but, I would like to try to continue and move the ball forward.

MATT

6:32 Okay. Yep. Absolutely. Well, we're all in the office today, so I should be able to touch base, with Tanya on that. Okay.

MATT

6:51 All right. So, the other thing is, I, unfortunately, I was not at the Booth when your team stopped by. I know, I believe it was Stacy iOS. Is that her name?

MATTHEW

7:02 Likely, yeah, I was actually out of town myself?

MATT

7:05 Yeah. Okay. And, and she had asked, O, Stacy is a girl, right?

--- Purchase decision ---

MATTHEW

7:11 Yes.

MATT

7:12 Okay. She'd asked for the recording as you had. So I assume that maybe you guys hadn't touched base on the conversations you and I were having that recording, of course, auto deleted being that it was so long ago. So one of the other items that you and I had talked about is doing, a refresher demo. Is that something that would still be useful to you guys?

MATTHEW

7:33 Yeah, it would be, I'd like to do that though, with pricing. So we can have kind of that full picture. And I plan to coordinate that all in one day with the evaluators here. Again, just bring them all in one row, kind of line them up back to back. Now, you know, having knowledge of pricing is the intent that I'd like to follow.

MATT

7:52 Yeah, absolutely. Now, did you and Michael ever discuss or establish a budget? Was there like a target that you guys were looking for?

MATTHEW

8:01 No, we have done the evaluation to price blind since we've wrapped the evaluations about a week and a half ago. I've started soliciting pricing and then your platform is, the third that we asked for pricing from, and that's the final one to wait for.

MATT

8:15 Okay, perfect. One last question. I mean, I realized I, this is what I meant to ask is for the spectrum integration. When when you said that you spoke with two of BuildOps, customers were both of them using the spectrum integration or was it more just?

MATTHEW

8:31 No, I've asked for customers from them.

--- Accounting integrations ends ---

MATTHEW

8:33 We have not yet spoken to them. So, but that is critical, you know, gate that we need to go through before we can move forward.

MATT

8:41 Yeah. Okay. Excellent. Okay. Well, I think that is all that I got. I forget also if did we talk, I know you said you wanted to have... this wrapped up or you wanted at least all the price goes before you went on vacation.

--- Purchase decision ---

MATT

8:59 Do you guys have an updated timeline for making a decision on this?

MATTHEW

9:04 Not necessarily. You know, we're really looking to finalize, I would say in the month of february and hopefully come to terms with whomever we choose. Then at that point start the, you know, implementation period.

MATT

9:16 Yep. Okay.

MATTHEW

9:18 Four to five months probably for implementation. Realistically? All.

MATT

9:24 All right. Well.

MATTHEW

9:25 I have a take down for him.



MATT

9:27 Yeah, it is. There ends up being a lot more that goes into it then, it seems, you know, at an initial glance, but, I feel like you guys are giving yourselves plenty of runway and you don't want to rush this decision by any means either.

MATTHEW

9:40 No, we don't no, I think at this point, we've done a pretty thorough evaluation of what's on the market and looked at it from an operational needs and now have to factor in pricing and then talk to customers before we're gonna pull the trigger. You?

MATT

9:53 Yeah. Okay. Well, that sounds good again.

*--- Purchase decision ends ---*

MATT

9:59 So I'm in all day company meeting today and then have another one tomorrow gonna be on the, but in between sessions, I'm gonna try and get with my director, get with Tanya, and then figure out try get you pricing as soon as we can.

MATTHEW

10:18 But it.

MATT

10:18 Would be by the end of this week, I'm hoping sooner than that.

MATTHEW

10:22 Wonderful. Yeah, I'll be in our main office this week and the first couple of days of next week, and then I'll be down in our national office for a couple of days but obviously available.

MATT

10:31 Okay. And ballpark, just an idea of when you'd want to do the refresher demo. I would prefer to come out and actually meet you guys, maybe bring a couple of my resources as well. So I'll have pricing in your hands before then, and we can review it on site but just to get an idea of looking ahead for scheduling purposes when initially seems like, a good week for you a good target.

MATTHEW

10:59 I would say either the last couple of days of the week of, the fifteenth or sixteenth or perhaps the... nineteenth or twentieth would be what I'd be shooting for.

MATT

11:15 19 through twentieth. That looks like that will work better for me. So let me just.

MATTHEW

11:19 To check everyone's availability and pto schedule because I'd like to have everybody kind of on the same page.

MATT

11:25 Sure. Yeah. Absolutely. Okay. Well, I'm gonna block that time for me anyway, just so that I don't lose track of it.

MATT

11:38 Okay. Cool. Anything we missed here? Matt? Anything else I should be thinking about?

MATTHEW

11:44 Good soup brother.

MATT

11:46 Right, ma'am. Well, hey, I really appreciate you being flexible and meet with me and let me get to work on this stuff and I'll be updating you as soon as I get more information.

MATTHEW

11:56 Appreciate it. Thank.

MATT

11:59 Absolutely. You keep having a great day, Matt. You all right. Bye?

*The End*