



Procore Midyear Review Call (Lauren onsite)

Tanya Eney with Procore
Recorded on 8/17/22 via Zoom, 1 hour 30 min.

Participants

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19198157996

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PROCORE

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OTHER

P5- Huddle Room 3

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Transcript

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

BRIAN

0:00 Hello?

TANYA

0:05 Hey, how are you? So you're brought somebody to the meeting today and I guess it's time for us.

BRIAN

0:11 Hello?

TANYA

0:15 Very demanding. That's funny.

BRIAN

0:18 In a minute, yeah. By the way up and go to sleep, he does this about twice a week.

TANYA

0:22 It gets up there extra attention.

BRIAN

0:24 Yeah. Is this come up and be like, I'm just gonna be right here in your face right now... which is fine. Alright. So, I think the ProCore folks called this meeting, right?

TANYA

0:40 Hi, I was just actually copying... what Eric and put it in the sure. Quick. This is what the... email and Lawrence got it is on site. She just message me, she was a minute late but.

TANYA

1:11 Hey, Tim. How are you? Said? You're in the car on the?

LINDSEY

1:15 Way to do.

LINDSEY

1:24 Hi, I'm Lindsey.

P5-

1:33 Hey, Lindsey.

BRIAN

1:34 Hey, Lindsey.

LINDSEY

1:36 Hello?

TANYA

1:37 You...

P5-

1:38 Good. How are you?

LINDSEY

1:41 I know. I think we're just waiting on Eric... and is it Lauren, I think, yeah, Scott to the cart office. So, I'm sure that they'll be joining moment.

TANYA

1:56 Okay. Yeah. She just sent me a note to say that there are a few minutes late. So, perfect.

BRIAN

2:04 Tanya, hey, I've got a duck out to a two o'clock okay? At the top of the next hour, I don't know how long that's gonna last, but probably it's probably like a 20 30 minute meeting. And then I can come back and we're still going, but, okay, I will need to cut out.

TANYA

2:21 Well, I think for you, probably the estimate demo and maybe they sell our stuff, is what would be, you know, as we move into like marketing stuff, you know, you want to sell you on.

BRIAN

2:35 As as much as my heart and once.

19198157996

2:39 Maybe maybe.

BRIAN

2:40 Maybe about talents would be best foot square.

TANYA

2:44 And Lindsey, I don't think you've met Brian Smith makes our cto, okay? So.

LINDSEY

2:50 Yeah.

BRIAN

2:52 I'm the cto and cofounder and I was the main code writer... on the initial service trade, the ProCore integration, the thing that's listed on your app store now?

TANYA

3:03 Yeah.

BRIAN

3:03 I'm pretty familiar with that.

LINDSEY

3:05 Okay, perfect. Yeah, nice to meet you. I'm the partner account manager for this partnership, of course, but just in general for our specialty audience. So that's kind of the area that I cater to. And then Eric of course, is kinda my, who I work with the closest at ProCore, being the business development manager. So, he and I are usually in tandem on a lot of different things. And this I think came at a great time. We're trying to do more of these like mid year reviews just to stay in sync. And I know we've got our regular check INS that we do. But just having, I think Lauren, the fact that she was going to either be passing through were in town. I just kinda was nice to get face time with Eric, but yeah. So I think the, we have like a loose agenda. It's not really. No kidding.

P5-

3:52 Hi, I'm...

BRIAN

3:53 Sorry, he's like I said, the close the door before I came in here. And so now he's like, hey, I'm just gonna hang out with you. So you see, hit me in the nose. It's...

TANYA

4:04 I have.

LINDSEY

4:05 Well, who he's not usually that he'll kinda keep to themselves. You won't ever usually pop up into my lap. And sometimes I wish he would, but.

BRIAN

4:14 Always wait. So, I'm on the, I don't know why, but I think he's Lightspeed on camera.

TANYA

4:22 Okay.

LINDSEY

4:23 Someone's my room, there we go.

TANYA

4:35 Hello? Yeah.

P5-

4:40 Yeah, hello?

19198157996

4:42 Okay.

P5-

4:44 That fit it failures and every meeting removed jumped into.

TANYA

4:48 Yeah.

P5-

4:49 The TV is like all of them, but it's gonna work.

19198157996

4:54 Make...

P5-

4:54 Us, look at ourselves. Let...

P5-

4:55 Us. Yeah... exactly.

TANYA

5:01 Well, great. Well, I think we've got everybody and Eric, do you know Brian?

BRIAN

5:07 Yeah.

19198157996

5:07 Absolutely.

TANYA

5:10 Okay. Very good. And then I don't think Lindsey, you've met Lauren. She's our senior director of the west sales. So she was happened to be up in the area. So she had reached out about some of my partners that that's funny because Erica just reached out to us or are we sort of have all worked out well. So, yeah, hey, Lindsey. Great to see it.

LINDSEY

5:29 Nice to meet you.

19198157996

5:32 Hello, Tim.

TANYA

5:32 Today, he is, he's going to join, but he was on for a minute and then I saw he brought, he is in the car but he was going to join. Okay? So I just copy the, what you had emailed me Eric. And then I also added one more thing at the bottom, just the agenda that we had talked about. So I thought maybe we could do the first half will come in this order that way if Brian wanted to duck out where we get into some more marketing stuff that he could, but I know he's interested. We've all been interested in seeing the, as the columns I want to, it's...

19198157996

6:08 Just Progress.

TANYA

6:09 Okay.

P5-

6:10 It used to be called us to calm.

TANYA

6:12 Okay. So what is the same one? Okay? It's not been rebranded ProCore estimate. Okay?

P5-

6:16 Yeah. And...

LINDSEY

6:17 And...

P5-

6:17 I apologize. I didn't bring a sales engineer with us to like go through like a deep dive demo. What we could do is either just like look through the videos together online and just chat through the solution. I mean, it's probably enough just for this group to get a sense of it and then go like into like a deep dive. We can. And then from there, we can just talk a little bit about like pricing integration partnership around that product. I think now that it's part of ProCore, it makes it like a lot simpler like it's a lot easier for us to partner around that product that maybe it was a year ago.

TANYA

6:55 Okay.

P5-

6:57 Just because it's baked into our skews and pricing and our referral program or anything like that.

TANYA

7:05 Let me.

P5-

7:08 Send you, Tanya, I'll just throw it in... if you just go to, if you just want to share your screen and go to ProCore, dotcom... slash estimator.

TANYA

7:22 Hello?

TANYA

7:32 You said pretty poor dotcom forward slash?

P5-

7:36 Correct.

TANYA

7:38 Okay. Sharing my screen here?

TANYA

7:46 So, this video?

P5-

7:49 Yeah, I have a 47 minutes. I don't have anything in between. I have like a two minute overview and then there's like a 47 minute deep dive, which I think is probably overkill but... I'll send that to you as well, just so you guys can watch it on your own time and come back with questions. And if we want to set up a time with a solutions engineer, we can let's just give this a quick watch. And then I'm curious to hear what questions you have and we'll go from there.

TANYA

8:17 Okay. Sounds good. I'm trying to just join. It. Looks like I said, I think the audio now.

TANYA

8:28 Alright, cool. We'll watch this and they will hear from him.

TANYA

8:39 What's that?

BRIAN

8:46 The audio part of this is not going so well.

TANYA

8:48 Yeah.

P5-

8:52 What? Lauren, I'll watch on our side with our own audio.

TANYA

8:54 Yeah.

TANYA

9:25 Okay.

TANYA

10:01 Yeah.

TANYA

10:10 Right.

TANYA

10:36 Yeah.

TANYA

11:21 Hello. Sorry, they have a database that can actually price. So it's sort of, it can be the free proposal stage for us because we do create quotes. We gotten quotes. Yeah, I sort of see it is, it does all the nitty gritty. And then there, we need to have some connect, you know, it was like, where do we, where would we look to connect? I guess, would it be that at the end sends over the summary proposal to us? But I would think, you know, one of our quoting drives the work quarter with line item. So would it be mapping all others? I mean, I don't know what do you think Brian?

--- *ST app contracts and pricing* ---

BRIAN

11:58 Yeah. So there's I agree with Tanya, there's a lot of overlap with, between the estimated here and our quoting. I mean, obviously, our quoting is not driven by take Austin stuff like that's. That pieces is new to us but the mechanics of building a quote somewhere, it seeing labor in items dealing with margin management and then controlling the, about the level of detail that the end customer sees and presenting it to them online, which I think it was maybe something that this doesn't do it.

--- *ST app contracts and pricing ends* ---

BRIAN

12:29 I saw a PDF and word, but I didn't see like an online present an except flow. Is there one? And maybe it just wasn't in the demo?

TANYA

12:36 I think the way that it.

P5-

12:37 Works in a ProCore experience, is that it then goes into our bidding?

BRIAN

12:42 Hello. Okay.

P5-

12:43 And then are bidding solution handles like that? Like interactive process?

--- *Accounting integrations* ---

BRIAN

12:50 Okay. So if the customer wants to view it online and then given approval online or ask for changes or whatever that's that would be handled in the scope of the billing tool over the bidding to it's a good thing.

P5-

13:00 Yeah, I believe so.

BRIAN

13:01 Okay. Alright. So that's you combine that the estimate building part and the bidding, customer presentation part, and that's kind of that's a pretty close overlap with what our quoting tool does.

--- Accounting integrations ends ---

BRIAN

13:17 So, I guess the like, I guess the question for me is like same thing Tanya said like what, where would be, you know, wherever the integration point be? You know, what were you guys thinking when we set up the agenda to show this off those? Where do you guys think we fit into it or what?

P5-

13:37 I mean, it's really came from you guys like asking to just to see if there's opportunity here. So I just wanted to show it and...

TANYA

13:45 Hey.

P5-

13:45 Mike, I mean, it might be that just the take off side. I'm just curious like what, where are you guys falling short in your value prop? And can this help support that at all?

BRIAN

13:54 Yeah. Maybe I'll let Laura and answer this, but maybe on the like take off to like feeding into quote process. Like I feel like our according tool is pretty good, but the like the setup to get to the point where, you know, what you're building and.

19198157996

14:19 Sure. Gonna use and.

BRIAN

14:19 So forth, we leave that as an exercise for the reader right now. Like we don't give them generally speaking, we don't give them tools to help put that together. We give them templates and that's about it.

P5-

14:30 Yeah, that's an interesting point Brian because some of that automation built into the light drives and plans and stuff obviously doesn't exist at service trade. So.

BRIAN

14:40 Right. And isn't likely to anytime soon. I mean, that's...

P5-

14:43 Yeah.

BRIAN

14:43 Yeah, that's just something where we don't do, no problem. Don't have any intention of doing anytime soon.

P5-

14:50 Okay. And that's only gonna get better on our side. We're investing a lot there that especially like even just the materials database like we're starting to work with like much better pricing data from suppliers is a big initiative for us between now and the end of the year.

--- *Parts management (inventory)* ---

P5-

15:11 We have some like really like basic national data, but it's nowhere near keeping part was all the supply chain challenges and volatility, and commodities prices. How are you?

BRIAN

15:22 You're driving that? Are you going to the individual parts houses and just trying to get like monthly updates. So their price books or something or how does that work in?

--- *ST app contracts and pricing* ---

P5-

15:31 It's early conversations, but that's the intention.

BRIAN

15:35 But what are you gonna do about the case where we're individual customers have, you know, have negotiated pricing, sometimes different sets of negotiated pricing in the same company. I mean, we've run across customers of ours who say, you know, branch, hey, has this setup just most of prices with Ferguson, but branch be as this totally other lists that they negotiate it separately. You know, that got pretty gnarly. We got an, how are you gotta deal with that?

P5-

16:00 We're still figuring it out on the short of it is today, they can just, they can just upload their own pricing. The customer can upload their pricing was right? It's actually not terribly hard to do that.

BRIAN

16:11 Yup.

P5-

16:13 The other way is, you know, just from like a, for the quick take off side of it, what ends up happening especially on like bigger Construction projects is they'll get individual pricing from the distributor for that particular project.

--- *ST app contracts and pricing ends* ---

P5-

16:29 So they'll send them the Bill of materials out to the distributor, the salespeople, then they'll fill out a massive pricing sheet for them, and then they'll bring it back end. Okay? So we're actually smack dab in the middle of those conversations with a manager electrical distributor right now on how we want that to work.

--- *ST app contracts and pricing* ---

P5-

16:47 I think at a baseline, can we get just even like monthly updates on M, SRP pricing so that people can just be a little bit more informed in their day to day take off? And then we'll go manual for the bigger projects. The second piece of that will be more of like an authorization environment, Brian, where they'll have to say, you know, let me in order to get my customer specific project specific pricing... you know, I'm gonna log in with my Ferguson customer ID or my sewn up our customer or whatever it is.

--- *ST app contracts and pricing ends* ---

BRIAN

17:22 Put it in the po number or something like something to identify that project. So like however would work?

P5-

17:28 Yeah. Yeah. We're just diving into it, but our plan is instead of two instead of subscribing to... you know, like a big parts database that does this for us. We're going to build our own.

BRIAN

17:43 Okay. Got it. What are the, what we've only poked at this a tiny little bit. So my information here might be a little out of date. But our experience with that little bit of poking was that the parts halogen houses we're not really set up technically to answer when a computer calls up and says, hey, give me the price, current price list for customer X or even, hey, give me the current price list for any body. And I was wondering if that damn and started the break some, yeah, or if it's still like pretty. I think he is, he looks like a bunch of, let me email you a spreadsheet. Is what we heard when we went.

18:20 Yeah, I think it's...

P5-

18:20 Pretty distributed independent and we're still trying to figure out like even though they have the rails setup to support it dynamically to your point, like they still have sales person answering giant Bill materials entirely through email.

--- *ST app contracts and pricing* ---

P5-

18:38 Yeah. And I mean, in that case, like they'll just upload it. It's like not, it doesn't really need to automatically flow in there. I think that the biggest... the biggest jump I think we can make right now is that like the baseline M, SRP price thing is updated for at least like the top 10 distributors grabbing he, you know, on a monthly basis like that's kind of like the first step stage, we're going into yep, and then to the extent that they can support, you know, customer projects specific or branch specific pricing then, and they have... the authentication side, you know, support that and match the appropriate projects like it's an integration project of itself.

--- *ST app contracts and pricing ends* ---

P5-

19:24 So we're kind of just, we're still in discovery?

BRIAN

19:29 Yep. Gotcha. Okay.

P5-

19:32 But yeah. So, I, you know, I think we should have a really robust catalog or pricing here in the next six months that's supporting that take off model. My question for you guys is... do we?

--- *Type of work* ---

P5-

19:47 Hello, if...

P5-

19:50 Constrict, they Construction estimator are also estimating service work... or like.

19198157996

19:59 Smaller?

P5-

20:00 Retrofit projects that fall into the services side?

P5-

20:03 I would say the larger the company, the more specialized, but like the small medium like specialty contractors are generally, there may be some overlap, okay?

BRIAN

20:18 Yeah. We heard we pulled our customer base in a customer advisory board meeting a little over 12 months ago, and for the folks who showed up for that customer advisory board.

--- *Type of work ends* ---

BRIAN

20:30 So we kind of Cherry pick the top after the market, right? So take this with a grain of salt. But when we pulled them some crazy high number, like 80 percent of them said that they had some separate Construction division or team or something separate from service and service projects now, whether?

--- *Type of work* ---

19198157996

20:49 Of those teams?

BRIAN

20:50 Had different estimators, if we didn't ask that question specifically, but just based on that answer, I think we can assume most of our customers have a separate team for big projects as opposed to service projects and regular service work?

LINDSEY

21:08 Yeah.

TANYA

21:09 The the...

P5-

21:09 Types of like service projects that are getting run through service trade.

--- *Type of work ends* ---

P5-

21:14 I mean... do they require like a, I mean, is it take off tool like a sophisticated take off to like a good fit for those? Or are they just sample like go in and look at it and

like here's your quote, you know?

BRIAN

21:29 Yeah, eight field that a big sophisticated tool feels like a little bit of overkill for the size stuff that we think is best fit for, per service trade.

--- *Type of work* ---

BRIAN

21:40 So well, we tell people like the projects that make the most sense for us for our platform or, you know, stuff that's going to be less than three months and duration. You know, I'd say the sweet spot is sort of the two weeks to two months range. Now that there's a lot of variation of that depending on how many people you pile into it so forth. But that's a big enough that it probably crosses months but not so gigantic that you're going to have many phases and maybe not even a dedicated product, a project manager on it. Like it's going to be relatively short in duration and relatively small and scope, what service project or small project or whatever term you wanna use means is a little different for different customers, but that's where we saw that's where we solve that. Where we did not see if it is, it's a nine month project run through GC and that's actually really out of scope, right? But it really, when GC show up, it's probably it's probably less of a good fit for us. Yeah, going to be mostly direct Bill to our.

--- *Type of work ends* ---

TANYA

22:40 And I think...

P5-

22:41 That's kind of a good use for our estimating solution because we are still not a good fit for like, you know, a big contract that needs to go take off and estimate like a whole, you know, go build a really sophisticated estimate for... like a data center, for example. You know what I mean? Yeah, this is really good like, hey small commercial project, you got a few rooms, you gotta take them off quickly, you know, instead of taking three hours to go take off, it takes like five minutes. You know, okay, that's kind of where the sweet spot is. And so, to the extent that your customers are looking for something like that, like I think we would be happy to start entertaining like some of those opportunity that's a good fit and even a business point to still like maybe this is even a typically a good customer for ProCore, but we can bring them into the instance and it's you know, pretty lightweight for us to get them set up on it.

BRIAN

23:34 Yeah. So, so I'll back to the size of project thing, so.

TANYA

23:39 Or...

BRIAN

23:40 Or the rest of the take off and estimating tools that we just saw in that video a minute ago. What's I expected you to say, yeah, we wanna use that for any project regardless of size, it can do ginormous two year long projects.

--- *ST app contracts and pricing* ---

TANYA

23:54 I just heard you.

BRIAN

23:55 Say no to that. So, so what's the, you know... what size and scope of projects are intended to be best fit for that? We just saw.

P5-

24:08 Yeah, I think it's I think it's like my understanding of it is it's like maybe like single digit 1,000,000 dollar projects, you know, maybe up to like low 10,000,000 dollar projects, things like that, but not 100,000,000 dollar projects, right?

--- *ST app contracts and pricing ends* ---

P5-

24:25 Where you need, you know, people are using like an act you bed with like really complex you like to your point like phases and all these other like tolerances of things they have to build in over like really long periods of time. So, and a lot of times we've even sold estimating companies that want something lighter weight to run alongside that. So, for their smaller projects... you know, the, but still probably 1,000,000 dollar plus sized projects, right? Because we don't even have customers that are doing under 5,000,000 in revenue.

BRIAN

25:02 Got it. Okay. I think, I bet we'd CR and D and Tanya, you guys back me up on this, but I bet the sort of.

TANYA

25:09 Normal.

BRIAN

25:10 Projects that we'd see is, you know, sub seven figures. Most of them, certainly there are people that do bigger, you know, bigger dollar plus projects, but I think we probably fit a little under that sweet spot, but.

P5-

25:24 That's today, Brian, what I would say is prior to the acquisition as the column has a lot of customers that haven't adopted all pro quarter that are much smaller than we would typically service. So, I think what we should do is probably do some cross being working just like look at those like who are the shared customers today?

We'd probably have, you know, handle. I mean, we have 44 shared customers that I'm seeing across to you today. I'm sure. A handful of those are right in your sweet spot. And I'm sure there's ProCore customers that are just on estimating, we have no chance of bringing onto, you know, a full instance of ProCore that we should be looking at, you know, on, you know, just from a horse trading perspective.

BRIAN

26:06 Got it. Okay. Yeah, I think that's that makes sense to me and I should say like, you know, it's not like our customers never do those larger projects. It's just that we don't we don't touch them like service trade doesn't does know or care about them. It doesn't mean we don't do them that we just don't pay attention to them in our product. But the customer, my goodness.

P5-

26:26 Yeah. I mean, that's something where even like internally kind of thinking about like how do we start having these conversations as we have more project management, you know, functionality like within service trade, it's worse. I'm still very much in the discovery phase is like how do we even qualify that? Like how do we, how do we run this discovery conversation? So it's hard to kinda know, does point pain points that they might be experiencing for those like smaller service project. So it's just top of mind sticking out.

P5-

27:03 Yeah. Yeah. When you say discovery like discovery or whether it's a lot, not, they, you guys need to like bring in ProCore because they're Construction is so big or?

P5-

27:13 Yeah, because we're just not season to asking the questions. I mean, we partnered with you all I got well, how much Construction I've been here using, but we don't have any qualification guidelines for that kind of stuff. So we're kind of just figuring it out like Justin now.

19198157996

27:28 Yeah, we, yeah, we just sort of landed on that. If it's GC related, it's not us by. So anytime that that's what they're working with, trying to keep track of what's going on with the V sees, is it's definitely not a.

P5-

27:43 Yep. Yep.

19198157996

27:46 One thing on the estimating the, you, right? Typically our customers, they are not using service trade to build out a quote that will have 50 feet by, you know, this, that, and the other because you're right? They're typically putting that on some type of a spreadsheet or some type of a system that is figuring up on the back end. You know, all that information. So, yeah, that would take off.

BRIAN

28:12 You didn't see a template to take off tool stuff that we saw a minute ago. There's a, I don't know if you've heard the audio or not. But there was a video Eric here in a minute ago with that. Sorry to cut you off.

19198157996

28:22 Yeah, no, no, no, that's perfect.

P5-

28:32 They missed your question, Tim?

19198157996

28:35 Yes.

TANYA

28:39 I think Brian may affect.

P5-

28:41 Okay.

19198157996

28:43 Right. I didn't get to see, I saw the video that I couldn't hear the audio and I came in a little late to, I'll go back and watch it. And then if I have any other questions, I'll let you know.

--- Purchase decision ---

P5-

28:51 Okay. Cool. If you just like YouTube Progress to meeting, there's like the short version, it's like three minutes. And then there's like an hour long walkthrough of it... and we've made some improvements like since then.

P5-

29:10 Hey, Tim.

P5-

29:17 And then if we want to go, if we want to go way deeper into this like that, I have, we have a whole group we can jump in with happy to set that up.

--- Purchase decision ends ---

P5-

29:29 So, I guess... one good takeaway is just like, how can we, you know, regardless of what we land on an integration here, I think I'll just leave it to you guys to kind of think through that a little bit... you know, if we can offer more, they're great. I don't know Brian, if you have any closing thoughts on estimating.

BRIAN

29:53 Yeah. It balls in our court to figure out how like, so for a project that's five figures, that project is probably even too big awards for those sorts of things. Like the estimating tool we saw is probably too much for that. And I think I heard you say that's way smaller than your sweet spot anyway.

P5-

30:12 Yeah.

BRIAN

30:13 I think the trick for us is one identifying which customers are going to have a mix of the five and six figure sized projects. And although the 1,000,000 dollar plus projects, things that are big enough that they make sense to run and ProCore. How do we tell them, how do we identify? They have those? Both of those, how do we articulate to the customer? Do they see?

19198157996

30:33 Or do these?

BRIAN

30:33 Here or don't have, you know, have them always go to one interface. And then sometimes we turn that into a service project and service trade. Sometimes we don't and yeah, how to explain all that to the customer and think that's our homework.

P5-

30:47 Yeah, yeah.

P5-

30:49 Yeah.

--- Type of work ---

P5-

30:49 One thing that comes to mind like listening for customers that are starting to reach, right? Starting your reach into bigger and bigger projects? Now they have, you know, a high six big here, maybe seven figure project. They're going to take on that?

BRIAN

31:04 Yeah, you?

P5-

31:04 Do they were just a services business before? And now they're going to go do a big Installation, they need to go take off?

--- *Type of work ends* ---

BRIAN

31:09 Yeah.

P5-

31:10 And, you know, they like shit, this is like a major take off estimating project and they're going to sit there for a whole day trying to take off these drawings. Like maybe if they see themselves getting a lot of those, then, you know, maybe that's a good fit.

BRIAN

31:25 Yeah.

TANYA

31:26 Is that, I mean, is that some place?

BRIAN

31:27 You guys feel like you're successful in your sales process is finding those companies that maybe we're smaller or ward more service based at our reaching up in the more projects and there's a point at which they're like, okay, I'm ready for ProCore now, is that, does that work for you guys?

TANYA

31:42 Yeah, I, yeah, I wouldn't say it's a huge fan.

P5-

31:46 The, the larger macro there is like companies that are trying to scale with keeping the same people. And there, you have a really... we do really well when you have an owner that's going... we wanted to, we are planning on tripling in size in the next year and we need to do it with basically the same, got it. That's like money, you know?

--- *Pricing* ---

BRIAN

32:15 Okay. Hey, you mentioned related to that, you've mentioned a minute ago, I think like a 5,000,000 dollar revenue cut off. Is that 5,000,000 dollar revenue for the entire business or simply for Construction project?

P5-

32:26 No, no.

P5-

32:29 Hey, go as much as I say, we go as low as one or 2,000,000, but as long, you know, they really have to like qualify themselves into it.

--- *Type of work* ---

P5-

32:38 Yeah. Yeah, it might be, it might be more like 3,000,000 are emerging sector goes from like three, two, 5,000,000 to 20,000,000.

BRIAN

32:47 Okay. But again, is that like total company revenue or is that specifically Construction revenue? Okay?

P5-

32:57 Yeah, Construction volume.

BRIAN

32:58 Okay. Got it. Yeah.

P5-

33:00 It's hard to justify spending, you know, 10 or 20 grand on Construction management software. If you're only doing a couple of big projects a year.

BRIAN

33:09 Yeah. Got it. And I'm asking mostly to help us understand and qualify, right? Like we're going to be going asking about revenue and then sort of back our way into service revenue. But I don't that Lauren check me on this but I don't think we normally ask the sorts of questions that would surface how much Construction revenue specifically a prospect is doing it. Maybe we're doing it not just.

--- *Type of work ends* ---

P5-

33:28 Not not yet. If we do it's like a one off. So it's something we would certainly well.

P5-

33:36 It's the same thing with our sales teams. Like I really want our account execs to be asking, you know, is there an MVP or fire contractor? How much your businesses service, you know, versus right now? They only ask how much is Construction? Yeah, I think we should know both like it's not hard to get the answer both.

P5-

33:56 I've literally been working with my reps like, okay, these people are looking at these products and not service, right? What's their Construction revenue like, and they're like...

TANYA

34:05 Hello. And I think it...

P5-

34:07 I know.

P5-

34:07 And I think it...

P5-

34:10 It's a more mature question to ask because it elevates the sale into something that is holistic to their business versus just like trying to solve a point solution for, you know, yeah, something small, you know, and it's I get.

P5-

34:25 Yeah.

P5-

34:25 Because our, I think our account execs experience a lot of risk. It's so hard to get people over the line because these contractors are so busy, they're just trying to get something wedged in there and they're protecting it with their life that they're going to lose, you know, lose a sale. So... at least not especially on the low end of the specialty Margaret.

BRIAN

34:50 Low end being that five to 20,000,000 dollar Construction volume ranges that to me.

BRIAN

35:01 Got...

P5-

35:01 It. Well, great. I'm so happy to do deeper demos, whatever we'd love just some feedback from you guys. I think... we see estimating as a great now, it's even more than what you saw on that last video. It is more real for now and we'll continue to be, so, it becomes a really nice land for us. So happy to get estimating solo, you know, stuff.

BRIAN

35:36 Okay. Hey, forgive me if this is kind of an question, but could have customer use just the estimating tool and not by the core ProCore application. I thought I heard, yes, but that seems a little weird is that.

P5-

35:49 Yeah, I...

P5-

35:50 Mean, it comes packaged in ProCore itself, just the estimating...

BRIAN

35:55 Hello? Okay. And they could use that. I guess then they would, there would be some parts of the ProCore UI, they just simply wouldn't use over.

P5-

36:03 Yeah.

BRIAN

36:03 Exactly. Okay. Got it. Bye.

P5-

36:08 Yeah. Yeah. I think they go in and they basically said that their projects I think they get access to like their projects and their directory.

--- *ST app contracts and pricing* ---

BRIAN

36:15 Okay. And...

P5-

36:15 Like that's it.

BRIAN

36:16 Okay. Got it. And then the projects would be an outcome of a successfully did it estimate?

P5-

36:25 Yeah. Well.

P5-

36:27 I, we, it's actually an input because we set up projects where they're in pre con.

BRIAN

36:32 Okay. Got it. So, so the workflow is set up, the project, put it in pre, con, run the take off and estimating and bidding process.

--- *ST app contracts and pricing ends* ---

BRIAN

36:40 And then at some point that gets accepted. And then I guess the state of the project changes. And then if you're not using anymore pro course tools and you're kinda done at that point, and then you just move onto the next project, that pre concept, something like that. Yep. Okay. Got it.

P5-

36:57 Yeah.

P5-

37:02 Cool. Let's move on to... Tanya. Do you want to go back to here? I have like a new, I wrote up agenda independently even though I sent that to you two weeks ago.

TANYA

37:17 Okay.

P5-

37:18 You gotta go back to your agenda though. I just want to.

TANYA

37:20 Yeah. Yeah. And I had my, I was taking some notes here, so you'll see my notes up there. So, killer.

P5-

37:27 Hiller, recycled, we, I don't know why we lost that one but we didn't get it. I think the larger study there was like they had some integration asks. Beyond that, there were two lessons learned. The first lesson was... the customer success person on your side, didn't understand the program integration and didn't know how to like navigate that, which is fine. We deal with the same thing on our side. So that's not saying you guys just to call it out. Yeah. And they weren't really sure like how that played into it when we show them, I think the integration that is available today, they were like, yes, and we needed to do this, you know, and I think their interest, Brian was more in the other use case that we had had gone down originally, which is more that linear use case of project. But coming... yeah, project becoming an asset of managed service agreement, you know, or a preventive maintenance agreement?

BRIAN

38:35 That's that's also, what I heard is I got a lot of this information second hand. So if anybody has better info the nail those please, you know, please speak up. My

understanding was they were interested in the outcome of a ProCore project being a bunch of assets and service tray with maintenance agreements associated within and recurring services to do PM or inspections or whatever on pieces of it that's I think.

TANYA

39:01 Really sure.

BRIAN

39:02 What they were asking for because they didn't understand the ProCore model very well. Like they didn't they weren't sure what the equivalent of our asset was. And so they thrashed around for a while and I think that added some fog of war to the thing for everybody.

P5-

39:16 Yeah, I think so. So... I don't think there's a ton that we could do to support that use case other than like a project maybe like closing out in ProCore or they're being like an embedded ap or something in ProCore that says, can you send all of this project information to go create a new location and service trade?

BRIAN

39:43 Yeah, but.

P5-

39:44 We don't have today. We do not have the idea of an asset or a fixed asset.

BRIAN

39:51 Yup.

P5-

39:52 In ProCore. So like that use case really couldn't be set up. There's some documentation that gets put into ProCore. I think there might be something from our, some middle side that could be explored because submittals go through like all the different phases from like delivery through close out. And then you can use our submittals solution as a way of our specs and submittals as a way to create an M docks. So I just some more discovery to be done there, but just wanted to close the loop on that.

BRIAN

40:25 Yeah. Eric, if you guys have the capacity and inclination to do so, I'm happy to sit with someone in the product order wherever they, that, you know, where, wherever they are, that can help me understand in detail with product project close out.

--- Assets ---

BRIAN

40:43 Happens, here are the sets of information that are available. And then I, from my side, it'll say, okay, my customer is gonna want to know this and this because I need this information to feed assets and this information, to feed attachments and so forth. And we can discover together.

--- *Assets ends* ---

BRIAN

40:56 If there is a, there there are not, I'm happy to invest that time from my side. If there's somebody from your side who can do, but it doesn't need to be a sales guy, needs to be like a product person who knows in detail. Yeah. Yeah. That's going on.

--- *Purchase decision* ---

BRIAN

41:09 Okay? And this is up to you guys. If you just don't see that there's enough of it, they're there to make it worth it that's cool too. But if you do, I'm willing to invest the time from my side, but it needs to be a product and API level conversation.

--- *Purchase decision ends* ---

P5-

41:25 I'll set that up, I think it can be aware the exercise either way just because even if it's...

BRIAN

41:30 No, right?

TANYA

41:31 It is, and it's...

P5-

41:33 It's probably good for our team also, just as we think about creating a place for assets and ProCore, like especially, you know, we're doing a lot in the simple and infrastructure space.

--- *Type of work* ---

P5-

41:45 Now, we're getting pulled in that direction. You know, we have a lot of contractors that want to understand like, you know, they use us for projects of going installing like multiple transformers like yup. You know, across mileage, you know, there, I don't know if it's not a perfect mix with this partnership, but we are increasingly be increasingly being asked to be able to understand the commissioning process, can support the commissioning process.

--- Assets ---

BRIAN

42:18 Yeah. When we just one more follow up question on assets or equipment or whatever we want to call them. When we spoke about this about a year ago, you said, yeah, there's like assets as a discreet thing. Is the concept inside ProCore, something that we're looking into. It.

--- Assets ends ---

BRIAN

42:35 Sounds like that. That's still not part of the product yet. Is there any read on if it might be one day or not sure yet or what, what's the story there?

P5-

42:44 Not not sure yet.

BRIAN

42:46 Okay. Got it. Okay.

P5-

42:54 I think maybe one day.

BRIAN

42:56 Sorry, go ahead, I.

P5-

42:57 Think it has to be one day.

BRIAN

42:59 Yeah, it may not matter in the medium term, you know, if the results of that call that we just talked about is, well, I don't exactly need assets. I can figure it out from blah, whatever blah is that might be good enough. Certainly at one, the one that just better, but I can figure that out with your product books. Yeah.

BRIAN

43:21 So, the question about delivery is kinda been, I suppose.

TANYA

43:28 You, when it let's say that.

BRIAN

43:30 Hi, Hillary, data live. And we were actually having this, how do we deliver conversation? What's pro course opinion on technical services, professional services work. I mean, is that something that you typically do that you want to do that you do reluctantly only when you have to like what's the approach?

P5-

43:49 We do it all the time and... the, it seems like the more we sell in especially in the specialty space, the more complex the ERP scenarios get. And... we are, our technical services team is building stuff all the time. Like we have. So we have a technical service site and professional services side.

--- Accounting ---

P5-

44:13 And the technical services side is basically does a combination of both building out custom integrations in a dell bumi instance. And we're gonna what a dell has a product called boom me, which is like a work auto kind of, okay. Yeah, it'll be our solution.

BRIAN

44:32 Yeah. So it's like no code, low code, snap wires together.

--- Accounting ends ---

P5-

44:36 Exactly. And they spend the majority of their time on like scoping and requirements, which is really the way it takes the majority of the work anyways to make sure everything's flowing in the right direction.

TANYA

44:46 And...

P5-

44:47 That...

P5-

44:47 Whatever third party software we're trying to connect with... is recognized in that middleware instance, if that makes sense. And so they do a combination of that. They also often end up supporting third party systems integrators with scoping and requirements on the ProCore side. So we'll get customers that come to us with like Microsoft dynamics, right? Everyone's as of dynamics differently... we, you know, TD industries as a massive electrical infrastructure contractor. Yeah, I think in Texas... they did a whole migration over to dynamics last year and we supported... their systems integrator with that because a lot of these big companies whether it's Salesforce dynamics, et cetera, have their own kinds of systems integrators they used to go to market with. And so, yeah. So yes, we do a ton of it. And so like in the example with hillier, like for sure, we would be willing to scope out like, you know, it's

probably gonna cost and 20 grand to do everything that they wanted with us. But I know you guys have an API. So, anyway, so.

BRIAN

46:00 Yep. Yep. Yeah. So you said there's a distinction between text services and pro serve. So, what's pro serve, if tech serve does all those things which are pro serve team does a lot of that stuff. So.

P5-

46:10 Yeah, pro serve is more... like paid admin, additional handholding and set up onboarding their packages of ours that are often... they're set up in. We basically like when I talk to a salesperson goes and sells a certain set of products to a certain size customer. There's a recommendation that they buy professional services because, and we're doing that. Yeah, that's a really a 2022 thing that we didn't have in the past... where we're just selling tons of professional services because our outcomes are so much better.

BRIAN

46:55 Yeah. Okay. We see similar things, right? You just, you're gonna need some of that a baby sitting at or you're not gonna get stuck. So. Okay, so, so perfect person, it was like consultative stuff maybe that bleeds over in the tech services or the pro serve person pulls a tech sort of person to accomplish certain projects, something like that. Does that, is that how it would go?

TANYA

47:18 They're they're...

P5-

47:18 Actually sold in separate scoping instances. So per pro serve, there's more like a menu of options that we have like a representative at supporting the sales rep in like here's what you're selling, the customer issues, what I recommend in terms of pro serve, let's see how they customer react to it. We technical services, it's the, it's our sales team getting a quote for a specific project and allowing the customer like this is what we need to build. And like, you know, and it's a scoping engagement the same way, basically an in house agency. Okay?

BRIAN

47:53 Yeah, that makes sense.

P5-

47:54 Yeah. And oftentimes our reps are, we also have third party systems integrators, we don't really tightly manage the program, but that specialize in like ERP connectors and stuff or like sharepoint iterations, that oftentimes our reps will engage them while they engage our in house technical services.

BRIAN

48:15 Yeah. And your text services just there to make sure that whatever the third party say make some sense that is technically feasible and all this other stuff, and to give them support whatever it is they're trying to do.

P5-

48:27 Yeah. I mean, it's almost competitive to some degree. It's a little bit the wild west right now, the demand and supply like this scale this program has as if around far beyond like... the like how tightly I guess we manage it from like an outside consultant and aside layer for.

P5-

48:47 Active you?

P5-

48:48 Know, we really, we like ProCore needs to go build out like the Salesforce trail head trailblazer program of the Construction industry? We just haven't done it yet.

BRIAN

48:59 Okay. Tech services. Is there like an existing customer could by text services hours? This is not just a new sales thing, right?

P5-

49:09 Yeah.

P5-

49:09 Yeah. I think it might be us.

BRIAN

49:10 Too. Okay. Right. Okay. Makes sense. You said a minute ago that I don't wanna misquote you here, but I think he said especially contractors, ERP, scenarios you've discovered or sort of more complex or more diverse than what you're typically used to what it is that right? That I understand. Yeah, when you said that?

19198157996

49:29 Yeah.

TANYA

49:30 It seems like Construction?

BRIAN

49:31 ERP would be way more complex than that, especially contractors that do smaller scope stuff?

P5-

49:39 G sees all do business pretty similarly there. Yeah, I mean, especially commercial gee seasons like you've seen it once in a 1,000,000 times like our stage 300 integration, like never like it. It's really strong. I've you know, all of them are to some degree when we get into specialty, we run into things like Microsoft dynamics. We run into penta, we run into there's like a longer tail of ERP that are handling things like procure and payroll and the sort of ugly things that are not handled by a typical accounting system.

--- Accounting integrations ---

P5-

50:21 So... and they use them in ways that like are not set up in our integration with them. So... yeah, I'm trying to think outside of dynamics and pen to others like dynamics. It depends there's...

P5-

50:44 There's a, there's a product that...

19198157996

50:46 Cores...

P5-

50:46 Use, well, yeah.

19198157996

50:50 Yeah.

P5-

50:51 Fargo there. Yeah.

--- Accounting integrations ends ---

P5-

50:53 Yeah. They are also to that, we just, we, the number of customers and the revenue opportunity was never big enough to justify our internal development teams building like a consistent connector there.

BRIAN

51:07 Yeah.

P5-

51:07 So, and like points doesn't open their API. So we gotta go and do this one customer at a time, fight their customer success to open up the API for the customer. It's like every single time.

BRIAN

51:20 Yeah, we hear the same story.

BRIAN

51:26 Okay. So the bottom line on the...

TANYA

51:31 Yeah.

P5-

51:33 Pasha. Misery...

P5-

51:34 Loves.

BRIAN

51:36 So, so bottom line, all that, the reason that situation for specialty contractors is more complex integration wise is just because there's more air ERP systems that you're likely to run into and no two contractors or specialty contract. We've used them the same way whereas GC typically... treat use their ERP and about the same way. So more diversity of systems and more diversity of usage.

P5-

52:02 Yeah. Especially if you go up market.

P5-

52:05 Why that is, have you done any investigations or?

P5-

52:10 I think it's just that like people started creating these big MVP businesses like on there, like they just figured it out as they went.

--- Accounting integrations ---

P5-

52:18 Yeah.

P5-

52:19 And...

P5-

52:20 Because they've always done it.

P5-

52:21 Yeah. And some of them are on the old version of coin. Some of them are on the new cloud based version of clients. Some of them do their service business through coin. Some don't you know... and then you have some that are trying to do union payroll. So mark doing union payroll.

--- Accounting integrations ends ---

P5-

52:39 Some of them have a mix.

P5-

52:41 It makes over open shop and do a little bit about that as being in Arizona.

P5-

52:45 Yeah.

P5-

52:46 Depending on labor availability. And so that creates challenges, you know, like, you know, workforce management is a big part of what we're focused on right now... that mix really changes... you know, and whether they are.

--- Accounting integrations ---

19198157996

53:04 A third.

P5-

53:05 Party HR system or are they run their ERP, right? All of those are different variables that inform not only how we integrate from a financial perspective, but also workforce management component. And so we're doing a lot of technical services around workforce management right now.

BRIAN

53:21 Yeah. All that stuff makes sense.

--- Accounting integrations ends ---

BRIAN

53:23 What does that make sense to me is why Construction businesses don't have the same problems. I mean, they still have payroll and a mix of union and non union areas. They still have all those other mess that you just said.

P5-

53:35 They do have consistent problems there. Just the set of variables that you're faced with when you're trying to solve their problems varies. It seems like per contractor and there's like a 1,000,000 permutations.

BRIAN

53:48 Okay.

P5-

53:49 Makes sense.

BRIAN

53:50 Yeah. Yeah. I don't know why and I wish I did, but I believe you, I don't see that the Construction side of this, but I certainly think that especially contractor side. No, I agree there's you know... 10 people in a room. There's 20 opinions on how to do stuff for sure.

P5-

54:08 Yeah. Yeah.

TANYA

54:09 It's more about.

P5-

54:09 Just the systems and processes they put in place to solve their problems so far and a lot of those like they have to make payroll every week.

BRIAN

54:18 Yeah.

P5-

54:19 So, they have a process that is concrete, it might suck, but it's really hard to break that, you know. Yeah. And so anyway.

--- *ST app contracts and pricing* ---

BRIAN

54:29 Got it.

P5-

54:31 The, the other, sorry, Brian, one more thought on that is on the Construction side, Costco through another piece, especially in the MSP space. They're trying to get closer to like advanced work packaging and doing like really complex work breakdown structure. So, they'll have cost codes for Construction projects that are like boiler makers first for phase one, you know, that informs that piece of labor. And

then they'll have like, you know, five, six variable cost codes, so they can get really tight and every single component of the project which helps them manage costs and, you know, every single part of it. So that also creates a integration complication.

BRIAN

55:23 Yeah, but it's still seems like you'd have those on the Construction side to if anything you'll have more of that like cost code, cost type, detailed complexity... on a large project as opposed to a smaller surface one or so.

--- Type of work ---

BRIAN

55:36 I, the MVP one, I guess I should say.

P5-

55:38 Yeah, that's what I mean? Though. I mean, MVP MVP Construction big, I mean, he Construction, Brian.

BRIAN

55:43 Okay. I gotcha. Okay. Yeah, as opposed to G sees, they don't have that.

--- Type of work ends ---

P5-

55:50 No, unless they're self performing.

BRIAN

55:52 Seriously?

19198157996

55:53 PC costco?

P5-

55:54 Farmer uniform.

BRIAN

55:57 Okay. That's the peace I missed. Maybe I was the only person that didn't know that, but that's I just assumed G sees would be like all of a specialty contract or problems on steroids.

P5-

56:07 They...

BRIAN

56:07 Don't they just...

19198157996

56:07 Outsource.

P5-

56:09 Here's, this here's the trade and here's, the sub contractor, right? And here's where they fit into the project. Whereas like that mechanic, you know, especially like they're doing a hospital that mechanical contractor is doing like here's like this type of chemical typing that's going to this, you know, like there's this one go into this. Lauren is a different set of skilled trades that are dealing with it and it's different prefabrication process. It's like really complex.

BRIAN

56:36 Okay. So all the complexity is old by the specialty contractor that's why you see all this crazy stuff in the specialty realm because that's where all the complexity, the detail, the complexity gloves, yes. Got it. Okay.

P5-

56:46 Yeah.

P5-

56:48 Somewhere along the way, someone decided that information is meaningful and they ran with it.

P5-

56:53 Yeah. Yeah. For sure. Okay.

BRIAN

57:02 I'm afraid I have to drop at the top of the hour and a couple of minutes. Is there anything else I can help with?

TANYA

57:07 No, I think we're...

19198157996

57:07 Going to do then you get an...

P5-

57:08 Good stuff anyways. So, I appreciate that. I appreciate the chat.

BRIAN

57:12 Yeah, thanks for, is good to see. And Lindsey, it was really nice to meet you.

LINDSEY

57:16 Nice to meet.

BRIAN

57:17 You Eric just at?

19198157996

57:18 Was leisure?

BRIAN

57:19 Whenever, whenever you're ready, I'm happy to have a, an in depth conversation about the project completion to service contracts thing that color want it. And the other people may want the future, happy to do that whenever you guys are ready.

--- Dispatch ---

P5-

57:34 Cool. Appreciate it. Thanks Brian.

BRIAN

57:35 Right. Thanks, guys. Yeah.

TANYA

57:36 Thanks, Brian.

P5-

57:41 Alright.

TANYA

57:43 Okay.

P5-

57:45 Alright. Where are we? Had a Tanya.

TANYA

57:48 So, going back to our shared agenda here. What can we do more together? We're just the depth, sales, nicely, answer that we had the conference coming up as I know your other conferences and debtors.

TANYA

58:08 So, do you guys have done some series a, you guys do a lot of things? But like I know for the Sage, for example, Sage business partner channel, is that what you're kinda envisioning with conferences and dinners? Or? Yeah, I think the way...

P5-

58:24 Like it's one component of running like a, I think a really strong go to market together. You know, I think... there's we have cross team, right? So we know where we align on prospects, opportunities and customers and I think we should be talking about that every single week or every two weeks at least.

TANYA

58:50 Yeah.

P5-

58:51 Bringing that up and talking about deals like that's kind of first and foremost... the conferences dinner is thing is like, well, what events are we going to that we were both going to?

P5-

59:06 And then...

19198157996

59:08 Using...

P5-

59:08 Cross team to understand? Okay, can you guys bring a customer and ProCore brings a customer that are targets of each other? And we bring them to dinner together and we let them talk. It's a, it can be massively effective actually for higher target customers. And, you know, it's a totally like non salesy environment. It's just great for brand equity and it gives us a chance to meet each other. We call that. I mean, that for us, that's like one-on-one for field marketing and we're doing it. You know, we try to do something with a partner and customers at every event we go to.

TANYA

59:52 Okay.

P5-

59:56 I heard that we have business next to each other at smack that you guys have 10 snack.

P5-

1:00:02 I will be there. I.

P5-

1:00:03 Will be there.

P5-

1:00:04 Are you on the whole time?

P5-

1:00:05 Yeah. Well, no?

P5-

1:00:08 Just for the trade show, I.

P5-

1:00:09 Was like four days for the stuff. I think we're doing the exhibit and what?

P5-

1:00:13 Yeah, it's a whole thing.

P5-

1:00:14 Yeah, we're doing the light version.

P5-

1:00:18 Well, good.

P5-

1:00:19 I can still be there well.

P5-

1:00:21 Yeah, I mean, you'll be there that anything and then there's nowhere to go on that there's like?

P5-

1:00:25 Yeah, it's kind.

P5-

1:00:25 Of an isolated. So, yeah, we can fully arrange something. We have stuff going on as we get closer to that. Lauren just paying Lindsey and I and I'll make sure for whatever nights you're there, you can just come to whatever we're doing.

P5-

1:00:43 Cool.

19198157996

1:00:47 Hello. Let's come with some targeted accounts do on our end, right?

P5-

1:00:52 Yep. Yep. Yep. Yeah... I just got our list of targets and individuals... because it's like overwhelming. There's gonna be like three of us there and there's like 2000 people. You know, how can you keep an eye out and network, you know, so that when you see a name, you go, I know you're working with someone. So, I think...

P5-

1:01:23 That's...

P5-

1:01:23 Less than a month. I can't believe that.

TANYA

1:01:25 Yeah, I was just, I was just pulling up our list of events because this is the one in Colorado Springs that we're talking about. Yes. Okay.

P5-

1:01:34 Yeah... Nikko's, a great one. We have a happy hour when I have a weird, you know, there's four nights or something. So happy to set up. You know, I think we have dinner reservations getting plan that's a great one. We should be looking at, you know... one one, you'll join target either way.

LINDSEY

1:01:58 Can work with Kelly who for y'all is knowledge is just she's on our field marketing team and I know she's working on that right now, getting some like reservation secured, stuff like that even if it's not like an actual dinner reservation, just finding time that we could do exactly what we're talking about, but I can work with your Eric and try to steal some time to do something.

TANYA

1:02:17 Yeah, I think more.

P5-

1:02:18 Yeah, perfect. Lindsey, I think more importantly is like let's getting cross team and like let's find a service trade customer that's a good fit for us and vice versa.

LINDSEY

1:02:29 Perfect.

P5-

1:02:32 And that usually ends up being just enough. It's like to be over ProCore to go from service trade to people from either customer. And it's like that's a great type dinner eight. That is usually really fun and...

TANYA

1:02:43 Active. Cool.

19198157996

1:02:48 Yeah. We will. We were both at a heat those events and we didn't even not. And then would have been, you know, easy because you're right? I totally agree that, you know, we can do more together and we share when we overlap with so many. Like I said, ethos Gordon, ally. Yeah. And this is great because I mean, you mean, you're right? We try to do the same thing, right? Make it affected, make it that says sales is sometimes so, yeah.

TANYA

1:03:18 How much are your?

P5-

1:03:19 Through the Sage... partners?

TANYA

1:03:26 We're starting to do more. Yeah.

P5-

1:03:30 Okay. Okay. Cool. Yeah. I mean, it's probably less than 10 percent of our business, but... it is still, it of all, you know, of all of our referral channels that is probably the strongest referral channel. Yeah. Are those Sage events?

P5-

1:03:58 Yeah.

P5-

1:04:01 Is that still your biggest source of leads?

P5-

1:04:06 The Sage partners, yeah, of partners that are sending us deals. Most of what we do on the eye SV side is more about trying to achieve technical fit in the sales and customer process versus trying to drive channel referrals. Because most of our technology partners are trying to get business from us, that's why they integrated, not physical therapy... but we still have a long ways to go. You know, we don't do nearly enough of like farming iron cross seamless for opportunities for trading. It's

just old sitting in the hills. We need to go mind. So, yeah, that's why we're having meetings like this.

TANYA

1:04:52 Well, with that, we have our conference coming up which is called digital rep conference in San Diego in November. And I've got the exhibitor can't just send you guys. I don't know if you guys would be interested ProCore, be interested in attending... but we'd love to have you guys.

P5-

1:05:14 I think send it over Tanya. Our budgets are events, budgets just got tightened. But depending on where campaigns team is, it may be really interesting for us. It would also be important for us to know... in that exhibitor, Tim, like the demographic of customers you guys have coming and like the number would be really helpful. So as much data you have in that the...

LINDSEY

1:05:42 Sure.

P5-

1:05:43 Decision...

TANYA

1:05:44 Okay. Yeah. Actually, I just got a slide on that I can find it while we're talking.

P5-

1:05:51 And if nothing else, maybe we even plan like a dinner or send somebody just do a 10 during that because we have like it was like seven people including our VP of sales for specialty, you're based in San Diego.

TANYA

1:06:05 Yeah.

P5-

1:06:08 It's easy to get to is right next to the airport.

P5-

1:06:11 Perfect.

TANYA

1:06:13 Yeah. This is our kind of our makeup of ours, who attends in the details which I can send over.

P5-

1:06:20 Glad we did the genders and the internet.

TANYA

1:06:22 Yeah, I...

P5-

1:06:23 Really am?

TANYA

1:06:23 Literally, just noticed that I was like that's interesting.

P5-

1:06:28 Really demographic?

TANYA

1:06:29 Yes, page groups next, you know, individual profile.

P5-

1:06:35 Show preferences. Okay. Is this usually like a pretty good... like... is pretty representative of your total customer base or is it isn't on the high end?

19198157996

1:06:57 Okay.

P5-

1:06:59 It's the folks that want to business better generally come to this event.

P5-

1:07:05 Yeah... great. What's the, do you know what the exhibit prices yet, Tanya, or what the involved?

TANYA

1:07:15 I do. So it's actually I'll find that and bring it out and we talked about it here. I didn't know them.

TANYA

1:07:27 See.

TANYA

1:07:36 Yeah.

--- Pricing ---

TANYA

1:07:44 So, for... the tabletop displace it's, 3,800. And then we also have some other... actually that's the old pricing that we have like breakfast lunch that we also which are a 1,000 or 1,500, but the tables 3,800. If you want to have a table.

--- Pricing ends ---

P5-

1:08:10 Okay. Lindsey, where I think we may be able to justify this, it might be outside of our campaigns budget. I'd like to even consider this is a note like there might be something related to like ProCore Construction network.

P5-

1:08:31 Right? Where we're actually interested in service trades, entire customer base even though not all of them are going to be great targets for ProCore. We still want to bring them on the platform and it might be a great opportunity for us go promote that within that base.

P5-

1:08:48 And so if, you know, broke isn't like, yeah, let's go spend and go. Maybe there's something on the brand side like the brand team has their own budget that might get us there. Okay? And then if that fails, then... let's just get like, I don't know like Riley or James or something attendee badge, and just like there's just... send them or, and then if that doesn't work, then actually regardless of any of those like let's try to get an inner setup.

TANYA

1:09:38 So, I'll send those over to you guys that demographic slide and the exhibitor could.

TANYA

1:09:54 Awesome.

P5-

1:09:54 Yeah, Tanya, I would guess that with, without having a registration list until three weeks before the event, my guess is probably not unless we get something from some sort of interest from our branding team just to get in front of that group. Okay? You know, to the extent we're trying to drive a bunch of interest to DC end, but it's also the week after ground rate, which is like our biggest kind of the end of the year. So... my guess is we'll end up just trying to do a dinner.

TANYA

1:10:32 Sounds good.

P5-

1:10:32 But we will sure try. Speaking of ground rate... how are you guys come into ground break? Is that on your budget this year?

TANYA

1:10:41 It is, we do have, I thought we were already signed up or sponsoring our, you know, one of the sponsors I'm signed up.

LINDSEY

1:10:55 And I sent you information on the partner summit to that's following?

TANYA

1:10:58 Yes, that's right?

LINDSEY

1:11:00 Okay.

P5-

1:11:04 Yeah, you...

TANYA

1:11:05 Don't I thought we were.

P5-

1:11:06 That might be just because we haven't added it yet. Lindsey, do you know how to check?

LINDSEY

1:11:11 I don't know how often it's getting updated but I can reach out to that team, okay?

P5-

1:11:17 Cool.

LINDSEY

1:11:25 And then also just kind of touching on that and prepping for it. I wanted to just bring back up the marketing initiatives from that like self-serve program just to see kind of where we're at with that status on any of those items and what we can try to prioritize that ahead of time. I know we talked to about like trying to get a training scheduled for our internal teams, but we wanna make sure that at least some if not all of those marketing items can be completed prior. And then especially before we start going into these events just to make sure that we've got the educational sources to provide sure, so to see how those are going. And I think my biggest... the ones from that list that I would say to prioritize and probably be the solution. Slick that one pager. It's just kinda probably the easiest one to knock off the list first. And then

not after the week would be a good one. Since that will get shared on our social channels. And that one for external purposes. It's just a great way to get kind of more eyes on the partnership prior to these events. So I would say that those two would probably be the biggest ones to prioritize.

TANYA

1:12:36 Okay.

TANYA

1:12:50 We do, we have not started working on this, so we'll have to get together with our marketing team and have them start helping us with that, okay?

TANYA

1:13:06 Yeah. I was looking at the ground break page here. I think this means I thought we are, so it's 2022 sponsored. I saw as down here. So where are we? I think we already had a Booth to there we are.

P5-

1:13:25 There you are. I missed you alright?

TANYA

1:13:26 Yeah.

--- Dispatch ---

P5-

1:13:31 Awesome.

P5-

1:13:37 Tanya, Dina attending that, I know you likely are.

TANYA

1:13:41 Yes, I don't know. I don't think we've figured that out yet. So... it sounds like you want to.

P5-

1:13:50 I had a blast last time.

P5-

1:13:53 No, she got lots of business online.

TANYA

1:13:56 Hi, everyone.

P5-

1:13:57 He knows me, knows this thing feel hand.

--- Dispatch ends ---

P5-

1:14:03 Yeah.

19198157996

1:14:04 Yeah... I think you're already on that list. So... we'll check with marketing.

P5-

1:14:12 What was that? Tim?

TANYA

1:14:14 He said that he thinks that you already on the list, okay?

19198157996

1:14:17 Yeah.

P5-

1:14:18 It's a Nola.

P5-

1:14:19 Yeah.

TANYA

1:14:20 It is.

P5-

1:14:21 Hi, I'm sorry, yeah.

TANYA

1:14:23 That should be good weather because this isn't it. So, no November. So I think like the heat is passed. So.

P5-

1:14:32 We're sending... it might be, we're sending like even like Brian or somebody from this team to just come do like discovery. Is also, this would be like all ProCore product team is going to be there too.

TANYA

1:14:46 Okay.

P5-

1:14:48 Just an idea. Sometimes you don't want to give, you know, give up a go to market batch for somebody on the R and D side, but especially because we're just trying to solely figure this out, it becomes a good place to have like... 600 conversations about this stuff, you know?

TANYA

1:15:06 Sure. No, that's a good day.

P5-

1:15:08 Right away, I think of like either Jamie or someone on his team with Brian tomorrow?

LINDSEY

1:15:13 Yeah.

19198157996

1:15:15 Yeah, I think is, Jamie, I mean, I think that would be good exposure for Jamie.

P5-

1:15:22 Jamie is our new VP of product. It's...

BRIAN

1:15:24 Cool.

P5-

1:15:34 Okay. Talks about ground break.

P5-

1:15:37 MM see, I assume you're attempting... mechanical service contractors, maybe not.

P5-

1:15:44 We don't...

P5-

1:15:45 Service. Okay?

P5-

1:15:46 We don't is five with power that sending somebody, but the service, they end up the way these things work, if we end up seeing that they send their service, their head of services. And the, our things are, when we're tracking team at all?

P5-

1:16:00 Yeah.

P5-

1:16:00 They should be.

P5-

1:16:02 Yeah. The second we attend an mba event, it's like, well, you guys have the service guys?

P5-

1:16:08 Right. Yep. Yep. Yep.

P5-

1:16:15 Yeah. Maybe we're looking at attendee list.

P5-

1:16:21 I mean, it's all the events that you guys, I mean, like read is whitespace for you. Obviously, they kinda run that show... west or now, I can't star all the big key one because western valid.

TANYA

1:16:40 Customer of yours.

P5-

1:16:41 Yeah. We went out to dinner with them in San Diego member or they use here.

TANYA

1:16:47 Integration. Thanks. So that's an...

P5-

1:16:52 Good one for us to like dive into if we could get a case study from western. I live like savvy huge frigging huge.

19198157996

1:17:03 And of course, the other one, I am, so your first for people there, and.

P5-

1:17:11 How is that going?

P5-

1:17:12 Account... they're in a good spot. Hi, this is higher new service sales guy. He hates service trade and not very political.

P5-

1:17:27 That's not a great place.

P5-

1:17:29 If he's new and everybody's like easy to fill out. Okay? But they, they're they've got a good... they, they've got a good strategy to continue consuming more service trade.

--- Implementation and ongoing support ---

P5-

1:17:45 I'm not quite sure how they're service trade usage and their per quarter usage is going like kind of parallel to each other, but they've actually just invested and are kind of similar to your technical services team. We have technical account managers like services a service and they're they invested in that to kind of get better at some reporting and stuff. So, they're continuing to think well.

--- Implementation and ongoing support ends ---

P5-

1:18:12 Would be a great opportunity to breathe life into both of these customers and just to see if they want to use our integration use case to the extent that either of them are using our financials.

P5-

1:18:26 To...

P5-

1:18:30 There you, if they're using the, our financials tools and they're bringing their service techs ponder Construction projects, we can add a lot of value there.

P5-

1:18:43 Yeah, I think. And core was sort of going to be our poster child for all of this. And then.

P5-

1:18:51 How, how can we try to track that down? Do we want to get on with their account managers? Like do we feel like they've already been pitch? Like, is there another, is there a better another shared customer?

TANYA

1:19:08 I don't know if western now has been pitched about ProCore? I mean, honestly, I didn't know that they had it. Do you know, Lauren if they have, if they've been pitched it, that would be.

P5-

1:19:22 Teeter, and...

TANYA

1:19:23 Okay.

P5-

1:19:24 I don't my gut tells me now.

TANYA

1:19:27 Yeah, yeah. I was looking through some of his notes and stuff and just like is quarterly plans and I don't see anything related to it. So it can be something that we pitch to them that may be of interest to them.

19198157996

1:19:39 Okay.

P5-

1:19:39 Yeah. I can pop over to their office on Friday, so I'll see what's going on.

P5-

1:19:56 I'll in that follow-up...

TANYA

1:19:58 Okay. Thank you.

P5-

1:20:02 My accounts.

P5-

1:20:03 Okay.

P5-

1:20:10 Taking decent next steps notes for once. Okay?

TANYA

1:20:15 Pardon...

P5-

1:20:17 Yeah. Okay. We talked about that.

P5-

1:20:30 Yeah. I guess the last thing might be, well, then I'll stop Lindsey. Is there anything? Is there anything else that you wanted to touch on? I know that the marketing Bill of materials was a big one for you.

LINDSEY

1:20:41 I think, yeah, really? Just the marketing stuff and making sure that we stay on track ahead of the upcoming events.

--- Purchase decision ---

LINDSEY

1:20:49 I know we talked a little bit about crossbeam so we can try to focus on that more and our next call. I'm not sure when we, when that one is, but maybe we can get something scheduled for the next like two weeks from now, do another touch base, but, I think, and just marketing in general and then going back to the case studies and getting some testimonials. I think that that's a good focus point. So those are the biggest things for me.

--- Purchase decision ends ---

P5-

1:21:18 Perfect. I think getting a testimonial would be is like first for business. We need to get a good shared customer using the integration and talking about it... because there's...

19198157996

1:21:39 Better.

P5-

1:21:39 Together story other than our referral relationship that like I don't see us scaling any amount of referral volume, either direction until the better together story is told by a customer.

TANYA

1:21:51 Yeah, you...

19198157996

1:21:52 Can...

P5-

1:21:52 Can really latch onto it?

19198157996

1:21:54 Yeah, 100 percent. Yeah, we totally agree and that's kind of why we slow down a little bit with me was because we wanted to have that before we really, you know, get everybody else been up with all the other activities?

TANYA

1:22:09 Yeah. I mean in the meat.

P5-

1:22:10 Time we should be looking at cross seamless because we've proven to be great referral partners either direction, I think. And so like let's continue to make introductions and just squeeze as much out of that as possible because we're so complimentary. And then, I think, you know, that should be happening in the biweekly is through Lindsey and we can come prepared for that. You know, especially now that we have, you know, potentially three banners that we're planning for. And then in the meantime, you know, I, I'm just wondering how we can help you guys get to help us get to the testimonial?

LINDSEY

1:22:51 Yeah, quick.

P5-

1:22:52 Hey, Lauren. Gonna follow up with western knowledge and import, which is great.

TANYA

1:22:56 Man.

LINDSEY

1:22:57 There's it looks like over 40 mutual's in cross team. So a good list for sure to pick from.

19198157996

1:23:09 Yeah, we'll take that action item. Tanya and I will go back to that list before our next meeting and sort of identify top targets.

P5-

1:23:16 Hey, great. Because once we have that, then we can get a customer on there. You know, I would love to get a services person in a Construction director on the same, you know, call both talking about how we're solving their challenges... you know, even if it's in a small way.

P5-

1:23:44 Cool.

TANYA

1:23:46 Awesome.

P5-

1:23:46 Anything else?

19198157996

1:23:49 One of the thing that we're curious about, maybe you guys already talked about it, but we are running into another competitor of recent and it looks like they're trying to say that they compete with both of us, which is a big tall order but I don't know if you guys have run into BuildOps if you see that is them sort of complementary to what you do or competing of what you do, but just kinda curious because we wanted to accounts and they said, yeah, we can do that. We can do everything. Okay? No, we can't yeah.

TANYA

1:24:23 So, my...

P5-

1:24:24 My sense is there salespeople are probably trying to speak a bigger game about their project management system than they actually have. I see them as directly competitive to you guys, not competitive to us and we, you know, we know their leadership and they're planning an integration for Q1 was ProCore.

19198157996

1:24:46 God.

P5-

1:24:53 But then say, they do have some like project management stuff, but it's for small projects like no one's gonna run a 10,000,000 dollar project and build ups.

19198157996

1:25:05 Yeah... yeah, we know that, but I think you're right? I think some other sales reps a little of results but... yeah, they're more competitive does?

P5-

1:25:20 Yeah, they are. I would definitely, you know, I wouldn't be concerned about that, but definitely like take like BuildOps. I think they have a, they have a pretty good team and yeah, they're coming in at the space really hard and they've raised a bunch of money. What I always get concerned about and you guys have probably

experiences to, is that especially those like contractors that do both Construction and service our suckers for the all in one.

TANYA

1:25:55 Yeah.

P5-

1:25:57 And then it ends up failing them. And then they end up going to something more sophisticated. It's why all of them is trying to run everything through Sage back in the day. You know, they do a Sage service, H HR, they were like everything. And so, I think the savvy wants to know that they're you know, the power of, you know, purpose built solutions for each team is the way to go. But... you know, owners that have never adopted a strong technology, you know, that are trying to do technology advancement and trying to cut costs are gonna there. Yeah, the all in one is scary and distracting. So to that degree, it is competitive to us.

BRIAN

1:26:42 Value prop.

P5-

1:26:43 Because I know they're salespeople are going to be out there going. We're all in one for contractors and that's really bland. And then what do you really dive into it? Well, they're really for commercial service work and they do a little project management. So, it's going to give our emerging reps some heartburn but... not that worried about it.

19198157996

1:27:07 Yeah, it's kinda funny because we sort of along what you're saying, right? You guys are great at what you're doing when we would never tried to claim that we could even begin to handle that right? In the amount of.

P5-

1:27:18 R and D and the amount you.

19198157996

1:27:20 Know, focus that you guys put on it is, you know, amidst the millions and same with us on the service side, and yeah, the, you know, they sit there and say, yeah, all in one, we can do everything and we're like there's just no way there's it's almost impossible. But you're right? He, they, the small business, smaller business owners are definitely enamored by somebody who can say they can do it all phrase a great. And, yeah, I don't...

TANYA

1:27:46 And yourself 1,000,000,000 dollar.

P5-

1:27:48 Contractor, it might be a great fit, you know? So, I think it's like... yeah, I mean, there definitely was paying attention to... yeah.

LINDSEY

1:28:05 And, and...

P5-

1:28:06 It's word. I might like. This is a little darker but else, hey, it's worth considering that they had an integration coming with us as well and we'll be going through similar motions, you know, trying to get testimonials and doing the same thing because we're we'll play with all of them, you know? And so, preference typically goes to the strongest customer stories.

19198157996

1:28:35 Yeah, fair enough. That's not it.

P5-

1:28:37 Program on our side, but it's just, it's the nature of sales reps being able to attached to, you know, references.

19198157996

1:28:44 Yup. Yup. Totally understand that.

P5-

1:28:50 Hello. Hey, we're in a good place.

TANYA

1:28:53 Yeah.

P5-

1:28:54 Thanks, Tim, Lindsey. I know we went over on your schedule. I appreciate you hanging on.

LINDSEY

1:28:58 No worries at all. I wish I could be there in person too, but no.

TANYA

1:29:03 And Lindsey, I'll look at our, at my calendar and can challenge types of days because we are regular scheduled for yesterday, but I cancel it since remain today. So you're right? We want, we don't have it on the calendar until September. So with all these things, maybe we like I said, revert group and maybe two weeks and because I know Tim is out of the office next week and then, so that's probably a good timing anyway.

LINDSEY

1:29:28 Yeah, that's perfect.

TANYA

1:29:31 Okay.

TANYA

1:29:37 What was that soon?

19198157996

1:29:40 No, I was just saying, I appreciate it. Yeah.

P5-

1:29:45 Alright. Thanks, Tim. Thanks, Tanya. Bye everybody.

TANYA

1:29:47 Thanks, everybody. Bye.

The End