



Call with Haynes Mechanical Systems, Inc - Jake Lamalfa

Sean Jenkins with Haynes Mechanical Systems, Inc
Recorded on 6/27/23 via SalesLoft, 5 min.

Participants

SERVICETRADE

Sean Jenkins
SDR

HAYNES MECHANICAL SYSTEMS, INC

Jake Lamalfa
Sales Manager, Maintenance

Topics

<i>Type of work</i>	0:41
<i>Purchase decision</i>	3:36

Transcript

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

JAKE

0:00 Hello?

SEAN

0:02 Hey, Jake.

JAKE

0:05 Yes.

SEAN

0:06 Hey, man. Sean Jenkins giving you a call to service trade, get you a good time.

JAKE

0:10 This, yeah, just driving.

SEAN

0:12 Cool. Gotcha. Yeah, I appreciate it. Joe. Kill born said that you were the one to talk to you over the regarding sales. So, reaching out with service trade. But in regards to Northboundary sales, CRM built specifically for mechanical contractors that we acquired at the end of last year, wanted to get in touch with you and see, do you have a team right now trying to acquire more maintenance agreements at hand mechanical systems?

JAKE

0:38 I do. Yes.

--- Type of work ---

SEAN

0:41 Okay. Gotcha. So would you say that's kind of a big priority for you all there, on the sales side, trying to get more of those service agreements?

JAKE

0:51 You mean, yeah, it's basically our only priority.

SEAN

0:55 Gotcha. Okay. Yeah, because that's exactly why I'm calling again, Northboundary, the sales built specifically for kind of what you do?

JAKE

0:56 Yeah.

JAKE

1:03 You guys are with you said Northboundary?

SEAN

1:06 Correct. Yeah. So, like comfort systems USA, I don't know if you're familiar, they use us at around 90 percent of their locations. So, I was wondering how are you managing your sales process right now? Do you have a specific CRM in place? Do you use it like excel sheets?

JAKE

1:07 Gotcha. Okay. Yeah.

JAKE

1:26 Yeah. So.

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

JAKE

1:29 So, here's, the thing, I don't wanna, I don't wanna waste your time. So I'm pretty familiar with Northboundary...

SEAN

1:33 Yeah. Okay.

JAKE

1:38 I have a lot of counterparts obviously, in the industry who use Northboundary, for pricing for CRM management, that kind of stuff we don't use it. We use a CRM. Well, basically, we just integrated to a brand new ERP system called BuildOps and all of our pricing and CRM management will be done through that. Currently, we're managing everything through atlas... through contact as context using their prospecting tool as well as their like CRM integration. And then we have our back end is Microsoft dynamics and then pricing, we use quadra, it's called quadra, pricing. It's kinda built.

SEAN

1:48 That's fine.

SEAN

1:57 Okay.

SEAN

2:03 No...

JAKE

2:26 I've already talked to like my directors, so I'm in a kind of a peer group with, other sales companies like maybe you're familiar with basset mechanical?

SEAN

2:30 I am.

JAKE

2:40 That's where I came from. They use Northboundary, but we just, we're not, we're it's not something that we're for right now. At least probably for the next year, we will probably not have any interest in this time of like moving to a different system.

JAKE

2:57 That all depends on how our pricing tool goes while we build it out in what's called BuildOps. If you're familiar with BuildOps.

JAKE

3:08 I lost you there. I think, are you familiar BuildOps or no?

SEAN

3:10 Yeah, yeah, pretty familiar.

JAKE

3:12 Okay. So, as a whole company, we literally just migrated and are in the process of migrating all of our systems over to that. So I would say the first thing, is not that there's no interest in using, you know, Northboundary maybe from a pricing standpoint, but for right now, all of our resources are being pulled towards this integration of our new ERP system.

SEAN

3:21 I...

--- Purchase decision ---

SEAN

3:36 Got it. Yeah, that makes total sense. Sounds like there's a lot going on there right now. So definitely, you know, understand that you're trying to implement that

solution. And I definitely understand how long that takes and kind of, the road bumps along with that. So.

JAKE

3:41 Yeah.

SEAN

3:53 I agree. Giving you some time would definitely be the best option there especially if you're already kind of aware of Northboundary, so, yeah, down the road, if you do run into any issues with kind of how you're doing things now, feel free to reach out, definitely just would love to show you around. Not trying to change anything overnight for you, but.

JAKE

4:09 Yeah. What, what I would say is maybe, you know, I know it's a little bit of ways off, but like the first of the year, maybe January, February, give me another call.

--- Purchase decision ends ---

SEAN

4:18 Yeah.

JAKE

4:24 And just, we can kinda see how things are going. I know that there's just no way that we can do. Even we won't even evaluate the system or anything right now. It's just, you know, I'm just, you know, I'm a sales manager. So I have to be sway in what things were looking at. But it's more of a operation driven, you know, company thing down. So it's just, it's a bad, okay.

SEAN

4:31 Yeah.

SEAN

4:38 Yeah.

SEAN

4:48 Totally hear you. Yeah, definitely get it. And definitely, and, you know, I been around the block a few times for this kind of thing. So definitely understand when the right and wrong time is to look at platforms like this. So pretty tight up right now. But yeah, I'll follow you down the road. If anything changes before then I'll see you over a quick email with my contact info, so you can feel free to reach out if anything does change. And then, yeah, I'll give you a call later down the line and we can go from there.

JAKE

4:55 Yeah.

JAKE

5:00 Yeah, of course.

JAKE

5:16 All right. Thank you very much.

SEAN

5:17 All right. Thanks, Jake. Enjoy the rest of your day bye.

JAKE

5:19 All right, bye.

The End