



MEDDICC training video

Mac Gilliam

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Participants

OTHER

Phone Caller #4

Phone Caller #7

Phone Caller #1

Phone Caller #3

Phone Caller #6

Phone Caller #2

Phone Caller #5

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Transcript

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

--- Pricing ---

PHONE CALLER #1

0:02 I think.

PHONE CALLER #2

0:03 Point four percent touch.

PHONE CALLER #1

0:04 Rate, I know.

PHONE CALLER #2

0:07 I leave that one, it's like, I know things that are super expensive right now. I'll look at a soft.

PHONE CALLER #1

0:12 Where... I know that... the...

PHONE CALLER #6

0:25 AB...

PHONE CALLER #2

0:26 X, so.

PHONE CALLER #1

0:28 Those are probably the better ones like different levels of AB too. It's like growth customer, whatever there's like three different types.

PHONE CALLER #2

0:37 They have like a five percent opportunity creation rate.

PHONE CALLER #1

0:41 I did really.

PHONE CALLER #2

0:42 I believe so. So either that was right. When the five percent of like three point something, so.

PHONE CALLER #1

0:52 Chilly I got cold.

--- Pricing ends ---

PHONE CALLER #7

1:04 That Danny with you?

PHONE CALLER #1

1:06 Yup.

PHONE CALLER #7

1:07 I tried to call deli earlier. Yeah, never mind.

PHONE CALLER #1

1:17 He's back.

PHONE CALLER #7

1:18 Alright, Danny, I tried to call galite this morning. She wasn't available. I think... it's time to be like she get off the pot. So, I'm gonna call her later, but what do you think about that?

PHONE CALLER #2

1:30 Yeah. Talking about this morning, the shower, I think.

PHONE CALLER #1

1:33 Our conversation.

PHONE CALLER #2

1:34 Needs to be around like, you know, it looks like they're looking for excuses to not move forward servers.

PHONE CALLER #7

1:43 It's smoke screen injection.

PHONE CALLER #2

1:45 Maybe do like a field found like, you know, we understand changes difficult, fear of the unknown fear of this is going to be the right product for you, but recreate the

value and then kinda come into the back door saying, based on my experience, it kinda sounds like you guys are making excuses not to move forward. Sorry, I'm wrong, but like that is how it feels.

--- Purchase decision ---

PHONE CALLER #7

2:07 I think it's been long enough we got to call it out. I think that's perfect.

PHONE CALLER #2

2:11 Yeah.

PHONE CALLER #1

2:12 And a lot of the excuses are making like, does that outweigh the pain that you guys have expressed to us for the last three months?

PHONE CALLER #7

2:18 Right. Fact.

PHONE CALLER #5

2:19 That...

PHONE CALLER #1

2:19 The stacks credit card fees are little.

PHONE CALLER #4

2:21 Hire...

PHONE CALLER #1

2:22 Or that the picture won't and exactly where you want it to or whatever that is. It's just like that really outweigh everything it does then we discuss.

PHONE CALLER #2

2:30 Stop talking for sure. And...

PHONE CALLER #1

2:31 I think the ice breaker.

PHONE CALLER #2

2:32 Get in there. Just saying, hey, you know, we're approaching February.

--- Purchase decision ends ---

PHONE CALLER #2

2:37 Now, we had promised an execution date of three one. I've only got two spots for new customers come in the door. So I wanted to kinda call you out on that and then bring everything into play. So if you want to have a conversation around that we can do that, I'm open pretty much all day, got a couple of scheduled meetings, but I can tag team that call with you any time or take it on. It doesn't matter.

PHONE CALLER #7

3:01 Okay. Well, she was in a meeting with Alan this morning, so I'll connect with you after this and we'll kinda figure out that talk track and go from there.

PHONE CALLER #2

3:08 Right. Yeah. Same thoughts this morning. There isn't a shower. I'm like I just want to kill the thing I've done and did.

PHONE CALLER #4

3:16 What?

PHONE CALLER #7

3:16 Are you thinking about working?

PHONE CALLER #1

3:17 I, in your head in the wrong place?

PHONE CALLER #7

3:23 Right, great.

PHONE CALLER #1

3:26 Right. Free. All right.

PHONE CALLER #2

3:29 I got my frustration out this morning on ourselves. This we'll cut that.

PHONE CALLER #1

3:40 Good morning. Everybody. Good morning, Mac. Are you here? Are you in the office Mac?

PHONE CALLER #6

3:47 No, I'm working from home today, but I'm on, so.

PHONE CALLER #1

3:52 Sounds good. Brooke you there, Danny. There. Can't see you guys on mute?

3:59 Yes, sir.

PHONE CALLER #1

4:00 All right. Sounds good. All right. So, I have sort of teased this concept and talked about a little bit with everybody. I've even started asking you some of all these questions. Like does this morning, I kinda went through the entire medic chain with you and we were talking about, I think it was J MC or one of those and kinda just testing it out a little bit. Essentially what we're gonna do is we're gonna talk about a new approach for qualification of deals and what that means for us moving forward. A lot of this is going to sound like probably common sense to us but it is a good reminder as to the level of information we need to get and the questions we need to be asking because our deals are, you know, they're becoming more complex as we're moving up market. Our deal sizes are going up the level of product that we.

PHONE CALLER #2

4:55 Or, you know?

PHONE CALLER #1

4:55 Presenting is changing. So that's why we're looking to change our approach to qualification. And that means moving up from Vance and moving into medic. And we'll get into that more. So today's presentation, we're going to talk about what we're doing, why we're doing it and how we're going to roll this out in slow phases to not try and just completely shake up the landscape. And then we'll just keep as a conversation and call out, you know, areas of concern, what we like, but we don't like.

PHONE CALLER #2

5:25 As we get through it.

PHONE CALLER #1

5:28 That sound good? Is he would have any questions before we get started? No, sir. Cool. So what is it that it's simply a qualification process? It's not a sales methodology as some might call it. It's a qualification process and it's going to allow us to one qualify out opportunities earlier on. We do a good job of it now, but this is just an added layer of it. It's also going to allow us for better, you know, forecasting things like that. But what is it? It's a qualification process and, you know, what it stands for? Metrics, economic buyer... decision process, decision criteria, identifying pain champ in and I, we added an extra see to keep including competition because we have to have it. So again, we'll see overlap with Nancy, but there's some other areas that this takes a little bit further into what we need to be gathering. So why are we doing it? You know, 1,000,000 dollar question. So we wanna make sure that we're working the right deals early and often is the biggest thing we've all run into, you know, opportunities where it's like why did I work that for two months? When that had no business? I didn't have any of this information. I could never get it and loan behold it close lost. So we wanna make sure that we're working, you know, quality qualified leads early on and allowing us to have that added layer of forecasting. And what I mean by that is adding this into like our deal reviews and recap, having a like a deal health, adding that extra layer that's the biggest thing. And

it's also going to force us to dive into, you know, what does it take for prospects to make a decision internally creating that path to closure. I think that with every tool we've invested in, with every conversation we've had path to closure is the thing that we're always working on and getting a clear picture of.

--- Purchase decision ---

PHONE CALLER #1

7:37 And this is going to help us continue that effort into getting a clear path to closure and the information we need to gather on every follow up call or, you know, the initial demo as well?

PHONE CALLER #1

7:53 So fancy is, you know, it's good, but I do want to open up to you guys a little bit. How do you all feel about fancy today in terms of our execution on that?

PHONE CALLER #2

8:12 I think it's a... 50 50 from my experience. If I don't if I have like a me yorker demo, I'm not really going in advance, not even about it. So I don't gather it probably is the right way to go about that. If I've got a hot deal where prospect was engaged, we have a solid meeting, lot of questions being asked. I have no issue going right in advance once that meeting kinda complete itself.

PHONE CALLER #1

8:42 When you go ahead.

PHONE CALLER #7

8:44 I was gonna say I typically always get authority need and timeline, but I typically never get budget or rarely get competitors.

PHONE CALLER #2

8:55 Good point.

PHONE CALLER #4

8:57 Yeah, I'd say like a mix of those between what Danny said and Brett said, if it's you know, we're just taking a look, we got this booked and, you know, not a lot of engagement from them throughout the initial discovery, then it's tough to get into budget and competitors with them and to really outline the bay completely if they're fully engaged and, you know... talking and all that good stuff. Do my best to get all that stuff.

PHONE CALLER #1

9:26 When you guys get fancy... do you ever go back to reference it again with the prospect or is that a one and done process?

PHONE CALLER #7

9:37 In our time line is always reference testing.

PHONE CALLER #5

9:41 It's just saying, I think it's more of a situational question, you know, depending on how it's all going depends if I kinda go back to it or not.

PHONE CALLER #3

9:51 I feel like it's not versatal. So like it's really meant for one type of prospect coming through that's you know, they have a fully planned out of when they're looking to buy who they're looking at, what their budget is. Okay. Fancy is great for that. But for the majority of the process that we speak to that's not really the case.

--- *Purchase decision ends* ---

PHONE CALLER #3

10:10 And that's why to Dan and brands point is we're only getting, you know, one or two of these, you know, on a consistent basis.

PHONE CALLER #1

10:18 Right, right. Exactly. And to, yeah, to your point, people don't even know how to answer some of those questions sometimes and it's hard to gather that.

--- *Purchase decision* ---

PHONE CALLER #1

10:28 So it's very situational us. I think you mentioned that or it's all just very situational questions. There's no room for interpretation really except for like, you know, a need.

PHONE CALLER #6

10:39 One thing.

PHONE CALLER #4

10:40 Sorry, Jack. One thing I might add to that is the budget question is a lot of times with the initial demo, most of the time, I would say there are people on there that either don't know what they're paying for software right now and have no clue what their budget might be. So it's that conversation is pretty hairy when those are the people you're talking to you.

--- *Purchase decision ends* ---

PHONE CALLER #1

11:06 Yeah. And I would say that the percentage of us getting an answer that we really want to hear is... of like we have 30,000 dollars allocated in this project. When was the last time you got that answer?

PHONE CALLER #5

11:22 Never heard that in my entire career.

PHONE CALLER #7

11:24 Maybe like one last year, you.

PHONE CALLER #1

11:28 What the infamous answer is depends on what you got. Why are we even asking the DAM question? So fancy makes sense for smaller deal sizes that are a little bit, you know, to the point, are we qualifying it? So like a smaller SMB tier one deal, fancy makes sense. Right now. You know, it's this is clear cut information. We can have this conversation. But as you know, we go up market that's when successful companies move to medic. So like the Salesforce is the outreach is those are that's when they started adopting this? Because this is a it's an ever evolving process. So as we go through this, I hope you guys can see what we want to ultimately get out is that this is going to be something that kind of will stick with us the entirety of the process. Whereas for us right now with fancy, it's the beginning of the process. And typically for the remainder of the process, there's a lot of question marks or just minimal information next to each later in the acronym.

PHONE CALLER #1

12:35 So here's an infographic we're going to get into it, each one individually in the sense of, you know, what is it and what types of questions are involved. I'll make this available to you all after the back just as a reminder and as a refresher, but it's also missing our second C but we will, we'll dive into each one of these so we can understand it just a little bit more and how it works for us specifically. But again, a lot of this is probably common sense. It's just a matter of how we're gonna track it. So metrics, I think this is probably what's most in line with what we've been talking about throughout QPR which is having a conversation around value is essentially, you know, the ROI, what do they do and what are they care about measuring for their own success? So that's it's what's the economic impact of your solution, that is going to force us to have that conversation early and often about what type of work do they do? What are they missing out on? What are they care to measure internally? And then how you know, service tray can help them reach their financial goals as a company.

--- Quoting ---

PHONE CALLER #1

13:50 So that's ultimately what metrics are. So a couple of ways to do that for us as we already know is asking, you know, the ROI talk track about, you know, what's your average, you know, ticket price, how many quotes are you getting out in a week? How many deficiencies are you getting out in a week?

--- Quoting ends ---

PHONE CALLER #1

14:08 Things like that. But then also what we're moving into, which is, what are your growth plans? You know, what, what's your focus for the next three to five years? How are you currently measuring success today? How do you plan to measure success in the future? Keeping track of that, forcing us to get that level of information is part of the metrics and medic. What are you questions? I guess about this first aspect here?

--- Purchase decision ---

PHONE CALLER #1

14:42 Pretty straightforward... economic buyer. This to me is very, it's the same as authority and fancy. But again, this is something that we just need to make sure that, you know, we're asking the right questions. I think we all do a good job of it now, but it's really just a matter of, you know, continue to ask the right questions.

--- Purchase decision ends ---

PHONE CALLER #1

15:05 So, it's to me this is pretty straightforward but it's the stuff we already know about, you know... who has a responsibility, who typically makes this type of decision? What do they care about? What do they need to know? Who signed off on the previous software purchase? Who has the ability to sign off on a purchase, such a service trade?

--- Purchase decision ---

PHONE CALLER #1

15:31 Does anyone else have any other questions? This is when I think of off a little bit, but does anyone else have any other way that they position asking about authority or the economic buyer?

PHONE CALLER #2

15:41 I mean, one of the ways you could do that is, you know, you kinda talk about it here, who signed off? Like what was your process? Like last time you guys have been out a software program internally?

PHONE CALLER #1

15:53 Yeah, especially with us as we're typically dealing with.

PHONE CALLER #2

15:56 People that this isn't their first.

PHONE CALLER #4

15:58 And I think that makes...

PHONE CALLER #2

15:59 Sense.

PHONE CALLER #7

16:02 Or like the simple trial close, like if you like what you see today, who are you gonna take this to? Or who are you gonna talk to internally?

PHONE CALLER #1

16:10 Yeah. Who's the next wrong on the ladder? Pretty much if it needs to see this, right?

PHONE CALLER #5

16:17 As well, you could also, you know, be like... if someone's not on that meeting and you're trying to figure out who that buyer might be, what would they like to see, right? What, what's important to them? You know, going over this, you guys have done this before or not. But what do you think would be important to them?

PHONE CALLER #1

16:35 Software...

PHONE CALLER #5

16:35 To help figure out what the decision maker is looking for?

PHONE CALLER #1

16:40 Absolutely. So decision criteria... this is probably one of my favorite pieces of medic.

--- Purchase decision ends ---

PHONE CALLER #1

16:52 Essentially, it's you know, what are the must haves, you know, what do you need to see in order to, you know, make this happen type of thing? This is the technical information. Think of this as like if you get sent like an RFP of all the things that they have to see in order to, you know, move this to the next stage. Obviously, I don't we don't mess with RFP but that's just the easiest way to think about this is what is the technical information the must haves, the need to have from the get go for us to continue moving this along the evaluation. So ways to ask, you know, what you must haves and successful software deployment?

--- Purchase decision ---

PHONE CALLER #1

17:30 What do you need to see today in order to get that next person involved? And then like what would you need to see to even entertain a follow up meeting if you're like on a discovery call and you just wanted to, you know, you have 15 minutes. All right. What do you need to see for me to grab your attention to make sure that this is even a fit for what we're talking about? So we qualify them for a fit. And so decision

criteria is ultimately like what is your fit for a software solution? Do you guys have any other ways that you guys like to go about getting this information or any feedback about this piece?

--- Purchase decision ends ---

PHONE CALLER #1

18:19 Yeah. Mac, I just switched those slides around. I think the definitions we were mixed up. So thanks for catching up.

PHONE CALLER #6

18:28 Yeah, thanks for catching me mixing up the definitions. Appreciate it.

PHONE CALLER #1

18:33 All good.

PHONE CALLER #6

18:35 Sometimes you build a plan while it's fine. Okay. You know, everyone's gotta make their minor edits.

--- Purchase decision ---

PHONE CALLER #1

18:40 Yeah, it's all good. But I think... this is crucial decision criteria in the sense of we need to make sure that this is part of the qualification we need to make sure we're talking with the right people. So like if they're coming to us with, you know, whatever qualifies on Construction needs, residential needs, things like that.

--- Purchase decision ends ---

PHONE CALLER #1

19:05 This is what helps us get that information. And this also allows us to then kinda grade out like what's the top priority, right? You just gave me five or 10 things. Realistically let's put that order. What do we need to focus on first? And then kinda work through that and just make sure that that's aligned with our value prop our, it, things like that. So, I think this is probably one of the more powerful aspects of the information that we have to get like.

PHONE CALLER #2

19:31 This page here have me think of a deal I was thinking about, want to drive into work. I had a demo where literally they took the meeting yesterday because we had a Foundation integration. And I'm like right, they were mechanical final safety company. They're using ServiceFusion for the mechanical side goal forms on paper, fire and sprinkler, like this could be a great demo. And literally, the main reason why he took the meeting was the Foundation integration. We went through deficiency reporting what I thought would be viable for them. And then he ended the meeting with first thing I need to see his documentation on Foundation. He ended it started

and he started and ended it same exact dialogue. And so while I thought it was hot and I felt good about getting off the meeting yesterday, I was driving into work like this is not a real deal it could be. But the main focus was a Foundation integration. It wasn't we're trying to build a scale product. We need better solutions. It was, we're looking for a software that will integrate into Foundation. So it's like it kinda took my ideology from like this is a great opportunity like this is low on the scale because if that's the most important thing to them, great, maybe they might pass it whatever the price sensitive, you're almost adding another 10 K on the contract which they were very sensitive.

--- *Purchase decision* ---

PHONE CALLER #2

20:48 So it's like this is probably not the best opportunity. Is something I don't want to spend a whole much time on, right?

PHONE CALLER #1

20:54 So.

PHONE CALLER #2

20:54 And this kind of talks about the decision criteria and it's right there that's one of the main decisions of why they want to move forward the shot and buying server trade is probably not very high, very.

PHONE CALLER #1

21:05 So, I guess with an opportunity like that, what are the options that you?

PHONE CALLER #2

21:12 As far as how do you like? Do you try and?

PHONE CALLER #1

21:16 That head on do?

PHONE CALLER #5

21:17 You try, you know?

PHONE CALLER #1

21:19 What are, what are some of the avenues you could take?

PHONE CALLER #2

21:20 To, so I'm hitting a head on, I sent them a video of what the Foundation integration looks like, talked a little bit about that on the presentation.

--- *Paper process* ---

PHONE CALLER #2

21:31 If it's something that works for them. One of their biggest struggle right now is just, they're doing a ton of double data entry from their mechanical and fire safe so that if they can eliminate that, that's a huge save of time and they don't have to worry about making manual entry errors which happens all the time.

--- Accounting integrations ---

PHONE CALLER #2

21:50 So, if I can create value around the Foundation integration, then obviously, I want to circle back to one of the main points was efficiency reporting, quoting opportunities. They miss the mark on that all day long in both divisions.

PHONE CALLER #1

22:03 Right. So I asked that question because I think with what, we know, you know, accounting is accounting?

--- Accounting integrations ends ---

PHONE CALLER #1

22:14 Everybody, does it, hearing someone's criteria can be important because it allows us in our experience to have a conversation and reframe of like why is that your number one priority? Why isn't this your?

PHONE CALLER #2

22:28 What prior?

PHONE CALLER #1

22:29 You know what I mean? And if you're able to have that conversation like sure Foundation integrations?

PHONE CALLER #2

22:35 Ultimately, you know, it's gonna be part of the...

PHONE CALLER #1

22:37 Deal. But at the end of the day, like reshifting priority within their criteria is probably the only way that this deal is going to be able for because our Foundation integration is.

PHONE CALLER #2

22:48 You know, a great, it's pretty sexy saying.

PHONE CALLER #1

22:53 It is what it is, but it allows us to understand what do you care about? And why? And let me tell you why our customers think about it a little bit differently. And if you can get people to bite on that level of conversation, then we're in a good spot... but that is.

PHONE CALLER #2

23:11 Example case.

PHONE CALLER #1

23:12 Yeah, half the time people come in with like I heard you integrate with computers, it's...

PHONE CALLER #2

23:16 Alright, cool.

PHONE CALLER #7

23:19 Yeah.

PHONE CALLER #2

23:20 Like on top of the cross, you know?

PHONE CALLER #1

23:22 I just thought I only had to pay 1,500 bucks for this, yeah.

PHONE CALLER #2

23:27 I like that reframe because it's yeah, exactly what we need to be doing.

PHONE CALLER #1

23:31 Yeah. Does anyone else have anything to add to this topic? Another example, like Danny, or is that pretty on par with previous experiences for you all?

PHONE CALLER #5

23:41 It's really good. It's a good example. I mean, to bring it back to perspective. That happens a lot like we're only here because of the accounting, right?

--- Purchase decision ---

PHONE CALLER #5

23:48 So you have to shift all that to, okay. That's great. But we can help you there. But why are you looking at our software? Other than that, what's important to you? And if we don't find that information, it's kind of a dead deal from the beginning. In my opinion.

PHONE CALLER #1

24:01 It's the iceberg, it's the iceberg that's the last step going on everywhere else.

PHONE CALLER #1

24:10 Let me, I got you Mac, I'll make that done. All right. So decision process, this is... understanding pretty much how they make the decisions internally. This is, do they have a committee? You know, is there a typical procurement process? You don't see that a whole lot, but as we're moving up market, you will see that. So it's just understanding the levels of approval pretty much that this needs to go through and asking those questions. So again, it's you know, what did it look like internally last time you made this decision? Yeah. Who all is affected by this decision? Is their input? Needed? It's asking just getting context around, you know, what have you guys done in the past or what do you think needs to be done... in order to make a decision like this or to get the right approval? So again, these are questions that we know that we have to ask, but this is now actually printing a label next to it because we have to focus on it. I think we've all been in a position where we think that we know how the deal is gonna close and we are in the eleventh hour.

--- Purchase decision ends ---

PHONE CALLER #1

25:28 And then someone else has to get involved or someone else has to come take a look at the quote or whatever. And that's something we could have got out in front of a lot earlier if we were putting an emphasis on finding that information.

--- Purchase decision ---

PHONE CALLER #1

25:48 I guess as I mentioned that I have an example of coming in towards the end of an evaluation where you guys kinda side swiped by the decision process, not being totally clear.

PHONE CALLER #2

26:03 Yeah, I've had a few of those.

PHONE CALLER #5

26:09 The company where the wife makes all the decisions and the husband supported him that Matt and I got into the literally that deal went south because he didn't like our terms and conditions.

--- Purchase decision ends ---

PHONE CALLER #5

26:19 And so we haven't we just, that deal was lost, but at that point, we thought it was a done deal going to closing. And then he turned it all around right at the last second.

PHONE CALLER #1

26:29 So, you guys are work that's Don, job, correct? Don and Carl. So you were working with Don the whole time and then it was like, yeah, this looks good. Carl will sign off on it. And then...

PHONE CALLER #5

26:42 He told us multiple times throughout. It was like I'll support my wife. I'll support. My wife is her decision. This time. This is our, what second or third go around with service trade. We know we need it. And then in the end, it's like, I wait, I don't get money back for XY and Z and I'm not gonna support her again. So it was like we kinda got blind sided thinking this was our meeting to close. Like literally they had the contract in hand and then, you know, it's totally bad. It's a bad feeling.

PHONE CALLER #1

27:09 Yeah, that's also a mixture of just a difficult human being to work with. Yeah. And that's because I say that because it's hard to get out in front of someone like that who just kinda lives your face.

PHONE CALLER #5

27:24 I guess that's true too. Yeah.

PHONE CALLER #1

27:26 Yeah... but this is going to be crucial for us as we're moving up market, you know, working with companies that are Chris mentioned yesterday, Brett and I talked about it with Chris. Money is tight right now for everybody. So due diligence is about to become a pain in the ass where they're going to be bringing in more people to take a look at this. So, you know, decisions are validated across multiple individuals to mitigate their own risk and cover their own ass.

--- Purchase decision ---

PHONE CALLER #1

27:57 So we have to be making sure that when people say I can make this decision, we are hammering down like, okay, well, realistically, this, these processes take a little bit longer, you know, first typically takes four to six weeks to make a decision. So, how can we get the right people involved in the right steps involved here?

PHONE CALLER #7

28:17 And Jack, do you see us bringing that up? Like bringing up, we understand money's tight right now and kinda going down in that direction.

PHONE CALLER #1

28:23 No... because I don't want to create an objection if we don't have to.

PHONE CALLER #7

28:30 Yeah, that's what I'm thinking about as well.

PHONE CALLER #1

28:32 Yeah, I think it's just something that we need to have at the back of our head to know that we need to be asking the right questions.

--- Purchase decision ends ---

PHONE CALLER #3

28:38 I'm just curious. Does as seen a trend as far as like deals where you have someone that tells you over and over, they, they're the ones that make decision. They're going to get the ones that can sign off on something like this. And then literally at the finish line, you know, there's two other people. Okay? And maybe they're partners or like legal or something like that. They have to run this deal through and it ends up not happening. I feel like I've kinda seen a trend with like large Construction companies that have smaller service divisions that may be that person that runs that service division, swears up and down all the way up until signature that, you know, this is something they can sign for. And then, you know, at the end, it's not the case but I know if anybody else all trends like that and what's the best way to kind of really vet those companies out just so that doesn't you know, we don't get stuck in that situation.

PHONE CALLER #4

29:30 Yeah, definitely have had those. I think it's tough when you have people that swear up and down that they can sign because you run the risk of just continuing to ask who's really signing this and basically calling them a liar. And I did that once with a guy and he wrote me a nasty email and hasn't talked to me since. So it's pretty tough situation. But yeah, I mean, that happens quite often. It's like, yeah, I can sign it, but I need Billy Bob to say I can sign it or I got to forward it to Billy Bob, but I won't even give you who Billy Bob is on, you know, that kind of thing?

--- Purchase decision ---

PHONE CALLER #2

30:09 I wonder if it's an area of top of conversation when you're going to review pricing emphatic that like, alright, I want to review pricing. I wanna make sure you have everybody on your team at that meeting, so we can answer all questions, make sure there's no objections, kind have a talk track around... making it important to ensure that everybody's on that meeting from their party when you're going over pricing, reviewing a quote that could help bring potential key players in.

--- Purchase decision ends ---

PHONE CALLER #1

30:38 I think it, that scenario to Quito, kind of boils into the other aspects of what we've talked about, which is like cool. Have you made a decision like this before? Like have you actually signed on something like this or last time this same type of, you know, purchase was made, who is a part of that? It's like it doubling down on like cool. You said you can do it. Have you actually done this or?

PHONE CALLER #3

31:01 Yeah. I was thinking of cons, fire protection, just how ridiculous that was.

PHONE CALLER #1

31:08 They did the same and that's what's so sad. Is that like I told you like what happened to me last time and then what will happen... to?

PHONE CALLER #3

31:20 Yeah.

PHONE CALLER #2

31:22 Did I work the opportunity before he did?

PHONE CALLER #6

31:25 And I worked there with you?

PHONE CALLER #3

31:27 I think Brad did too, right?

PHONE CALLER #7

31:28 I worked it with Chuck for a little bit.

PHONE CALLER #3

31:31 Yeah, yeah.

PHONE CALLER #5

31:33 Is that another path? Let?

PHONE CALLER #7

31:36 Pretty busy.

PHONE CALLER #1

31:36 It's it's pretty much like David, this guy, David comes in saying, yeah, I can do this. And then he, it comes down to, I gotta take this up to like my boss.

--- Purchase decision ---

PHONE CALLER #1

31:48 And then now we have to this to the board and it's like it's a sure done deal every time and it's always another layer of approval that has to be met. So, this guy's clearly never made a decision like this and gotten it signed off on. So.

PHONE CALLER #5

32:01 Is that a good process though? Kind of what Danny said? Do we, should we ask that question? Like, I think that's a fair question to ask if they say there, does the decision maker like, hey, what did it look like last time or, you know, have you done this before? Is that a fair question I guess to ask?

PHONE CALLER #7

32:15 Thank you kind of figure that out through the process. Like I have a deal they're coming off service, tighten that my champion is the guy who like took service tighten to the owner, got it approved. So he was able to explain that to me. But if they're coming off something like paper, I think that's a fair question to ask.

--- *Purchase decision ends* ---

PHONE CALLER #1

32:32 Yeah... it's a matter of how you ask. It is probably the most important thing like and you have to understand if you're talking with some, you know, Brad's right context keys are, you know, critical here because you, this might be the biggest purchase they've made outside of whatever else they might have like an accounting system or whatever like this is going to be one of the, their larger, you know, investments.

--- *Purchase decision* ---

PHONE CALLER #1

32:59 So you have to kinda put it out there. Like do you have an understanding of what this process looks like? Yes, great. Let's talk about that. If not, then we need to dive into that a little bit more about who actually stands to gain the most out of this and who's got the most risk tied into it because that's probably the person we need to get involved and to move this up the lot of the right way.

PHONE CALLER #1

33:27 Those are all really good points. Anything else before we move on?

PHONE CALLER #6

33:30 Jack, I had a question myself. Actually let's say that we're talking to someone and they have like service tighten or something. And, you know, we ask about the decision process and they are a little, you know, they're not really clear on it.

--- *Purchase decision ends* ---

PHONE CALLER #6

33:43 Do you think it would be like on those type of deals or conversations? We should really dig into it? Because if they've bought service tighten or a similar platform, obviously, they had some sort of method to buying it. So if they're not really exposing to you, how they did that, then I feel like you're missing a big picture right there. Is that correct?

--- Purchase decision ---

PHONE CALLER #1

34:05 Well, I mean if someone has purchased software in the past that's when you can just straight up as something like cool, who is a part of that decision? And how is that decision?

PHONE CALLER #6

34:12 Made? Okay, perfect.

PHONE CALLER #2

34:15 Always refer back to like found. There is kind of an unknown here's. My experience. How does that kind of play out in your world?

PHONE CALLER #1

34:24 Yeah, Danny said I felt found, which is exactly right? Because we have to remember that we're talking to a lot of people that have made poor decisions in the past. So like putting that out there into existence can help them understand like I get that like, you know, if you rushed into this decision last time, like, well, maybe we should like, it's okay for us to take our time.

--- Purchase decision ends ---

PHONE CALLER #1

34:46 It's okay for us to understand, you know, from all angles, what this looks like. This is what we typically see from people who are making this switch of who needs to be involved of like the key stakeholders who would benefit from something like service straight. So like, you know, your VP of service, they have on our service manager and owner, if they're not owner operator, things like that, like giving them that level of like role and authority of like you're right? They're probably people that need to be involved.

PHONE CALLER #2

35:14 To make this decision.

PHONE CALLER #1

35:20 Who means... this is probably very the most straightforward for us. It's identifying pain. So it's everything that we're already doing spin. Selling. Why are we meeting today? Digging into all that? This is, we don't need to take too much time talking about this one. But this is again, the overlap that I mentioned at the beginning of the meeting, this is essentially the end advance, but it's just called identifying pain. So, you know what business?

PHONE CALLER #2

35:49 Are we, are we trying?

PHONE CALLER #1

35:50 To solve?

PHONE CALLER #2

35:51 I have, I do have a question. Are people actually using installing tactics?

PHONE CALLER #1

35:57 Are we doing it intentionally or?

PHONE CALLER #2

35:59 Right? Like curious on feedback from everybody else? Are you guys actually using the spin to tactics to get the answers that we want or rolling through opportunities like?

PHONE CALLER #7

36:14 I don't think it's something I like actively think about, but I think I do it that said it could probably be better.

PHONE CALLER #1

36:22 You think it's something that we just, a lot of us were taught years ago and it might be the reason I brought?

PHONE CALLER #2

36:28 As I heard tray introducing onboarding, somebody is like we use the spin tactics like I'm like I haven't heard spin tactics... like I use spin selling to book a demonstration, correct? I don't think I've really consciously brought that into a deal as be said, probably do it unknowingly, but am I actually focusing on spin selling? And is it being a tool that's effective? So I'm actually getting a need pay off or I just fucking spinning out word vomit to try to set of getting the prospect to understand them. So there's a whole goal for need pay off is getting you to tell me what that need pay off. Me tell you what the pay off is. I feel like most of the time I'm telling you like, yeah, definitely that's gonna go one in one ear out the other very true.

PHONE CALLER #3

37:18 Use it sometimes, but I think when you over use it, it's like it kinda throws red flags up to the prospect. And sometimes I feel like for me, it takes away from my natural just like curiosity in the actual conversation. I'm not focused on what they're as much of what they're saying and trying to, you know, link questions together like think about that next pain point that I can maybe, you know, dig into. And sometimes I think I lose track of really just listening to the prospect being curious. And that usually leads to better pain points in my opinion.

PHONE CALLER #1

37:51 I think it can be mixed a little bit with the first thing we talked about, which is metrics and understanding what they care about and what their measure of success

and then diving into.

PHONE CALLER #5

38:03 How are you doing that?

PHONE CALLER #2

38:04 Today and stuff like that.

PHONE CALLER #1

38:06 And then diving into.

PHONE CALLER #2

38:07 Like the deficiency.

PHONE CALLER #5

38:08 Backing diving.

PHONE CALLER #1

38:09 Into all the metrics that we know that are easy like pay off type things. I don't to answer your question, I don't think any one of us is literally going down like this like the classic like I started with the situation, I went into a paying implication pay off. Like I think we've all got to it kinda comes naturally. And I would say that like if you do get your implication pay off like you're not really going to get there in your discovery investigation. If you try to like that's an artificial spin, I think you're doing that at the beginning, you can do it on a booking call. But like if we're doing it at the beginning, I think we're wasting time figuring out what we need to focus on. Whereas if we're focusing on what they care about metrics and whatnot, then we can get into the parts of the platform that are gonna open up the, my God, like if I can do this then I'm going to be able to do all these.

PHONE CALLER #7

39:03 Thanks.

PHONE CALLER #2

39:03 All right.

PHONE CALLER #1

39:04 That, that would be my way of saying how.

PHONE CALLER #2

39:06 Probably doing spin today.

PHONE CALLER #4

39:09 Yeah. I think to Quinton's point, if you're really focusing on like I feel like I do some pen and some SN telling and maybe skipping a step in between, you know, at times, but I used to kinda look at like, hey, what came from the booking call? Try to find a problem and then like organize a plan or a spin on the demo. And like Quinn said, like I think that distracts from the conversation. And at this point, I feel like the spin starts, it goes all the way from the first demo to the closing call, right? You might not get that need pay off to a little bit later or you might not get, you know, you're kind of filling in the dots around it, but feel like they're on a good deal. Typically, I'm making it to some sort of spin throughout several meetings, if that makes sense.

PHONE CALLER #1

40:02 It does. And that's why this process of what we're talking about today is something that's going to be updated and reevaluated throughout the entirety of the sales process. And then we can add to this and bring it back up and it's ever evolving ever changing. So that's a great call and...

PHONE CALLER #1

40:23 The first is champion. We have all, I think we've all had a discussion about champion. We all understand the importance of a champion. I spoke to Justin about a little bit today during our pipeline of being able to get multiple contacts involved getting their information. So, you know, multi threading, it is extremely important to help with that and where you might be able to identify a champion on your second call or third call. And, you know, building up a group of them instead of just thinking that your champion is single threaded. So sure we've all had deals in our head that we think about like, yeah, if I didn't have that person, this probably would not have gotten done or at least in a timely manner that it did. So being able to identify by them early and often, and continuing to follow up with them outside of regular scheduled meetings is the most important thing. So, you know, who's responsible for implementing something like ServiceTrade, who would be the most effective by this? Who stands the most to gain?

--- Purchase decision ---

PHONE CALLER #1

41:26 And then when you have your champions, like asking, like how would you sell ServiceTrade internally? You go to your boss, you sit down at the desk, what's the first thing you're gonna say? And then the next, you know, I guess that's what I said. But like, you know, what is the first thing you're gonna mention? So those are the types of questions that we need to ask. But again, that's pretty straightforward, but does anyone have anything that they want to add to champion?

PHONE CALLER #2

41:53 Just make sure they have the authority to sign off on a contract?

PHONE CALLER #7

41:56 Champion?

PHONE CALLER #2

41:58 Sign the contract, have no authority to do so whatsoever. Who is that new Jack...
three months later?

PHONE CALLER #1

42:09 Yeah, don't do that.

PHONE CALLER #2

42:14 How would you, how would you make a decision? And he certainly did... fire.
Now, you get fired, being my internal champion again in the next three months.
Yeah. Okay. But anyway, it's a little off topic.

PHONE CALLER #1

42:27 No, it's no, it's fine. No, it's fine.

PHONE CALLER #4

42:30 Yeah.

--- *Purchase decision ends* ---

PHONE CALLER #4

42:31 I think like identifying their level of influence within the organization is pretty
much gonna identify if they can be a champion for you. Like I'm not gonna waste
time with this dispatcher, I know to conquer her fears or build her into a champion
of, you know, nobody cares about Peggy. Like I just had a deal. This guy was a brand
new, you know, a brand new to the company he was working with, but he was a
previous customer of service trade and he was all hot and heavy. He was saying we're
going to get on this thing. You know, we're at a rock and roll. Then he tells me, yeah,
I started last week like, yeah, that's great, fantastic. We get on with the other three or
four people. You know, obviously this guy was the new voice in the room and he was
not an ideal champion in that situation. So.

--- *Purchase decision* ---

PHONE CALLER #1

43:19 Yeah... absolutely. Recap helps with that too, everybody because that's in terms
of the positioning, you know, you're asking you figuring out who's going to sell this
internally. That's why we position recap. It was like cool. This is all the information
you need to do it successfully. I've made this for you to go get this done. If you've
identified that this is a fit. Cool here's. How we're gonna get it done. And here's the
tool.

--- *Purchase decision ends* ---

PHONE CALLER #2

43:49 You need to go get this done internal.

PHONE CALLER #4

43:52 Yeah. So, I guess my point with that was like, hey, I should have attacked a little bit more with the multi threading instead of talking to him so much. Go after one of those people you've been here for five years, you know, and get them involved even if it wasn't the owner but get more tight with them.

PHONE CALLER #5

44:09 Point.

PHONE CALLER #3

44:10 I think what you're kinda getting that something I'm running into is like not always a person that you have a good initial meeting with like maybe a dispatcher is going to be your champion that's kind of like an influencer. And so, rather than, I guess if we're using medic like maybe champion is not filled out until we really feel like we have like we've found that person that can sell it up to the DMS?

PHONE CALLER #4

44:31 Yes.

PHONE CALLER #1

44:33 Yeah, that's exactly right. And that's why it's you know, like who's most effective by this, you know, thinking about who's going to get the most value out of service trade in an organization. We can most likely answer that question. We just have to figure out the name associated with the role... that's a very good point. And then competition, our favorite one. We all know about this. It's just a we going up against. So this is, obviously, it's becoming more prevalent of why we need to be getting this information early and often with the market today. But we wanted to make sure that we added this, the extra C to medic so that we are not getting away from gathering this information. Our competition today is obviously as easy as, you know, BuildOps and spec point, which doesn't seem to be much competition more but like so all those things but also again status quo or just in decision itself. So these are all things that we just need to be keeping track of and, you know, continuing to update as we move through the process.

PHONE CALLER #2

45:43 Competition as like these labels, but I do wanna put in play these bolt on or also competition. I don't think we talk enough about like we always talk about like BuildOps and spec point, but these small market little account plugins are also our competition that we have to figure out. I didn't figure out how to better bet that out... like field connect. It's a ship product, but it's a competitor and it's a heavy better because of what it does. Now, see. Does it just bolts on to their accounting system that's a great.

PHONE CALLER #1

46:20 Yes, san, aren't you going up against feel connect right now?

PHONE CALLER #4

46:24 Yeah. Yeah. I'd love to chat with you about field connect, Danny if you might be able to provide some fun?

PHONE CALLER #2

46:31 John, it's just, I've been pulling up some reports and some opportunities I want to start prospecting into and I'm seeing that, you know, a lot of these deals were lost because of this native vessel that they have with their accounting software, which is like four more feel connect opportunities which is like end of life and they don't have support but it's still.

PHONE CALLER #1

46:51 It's easier.

PHONE CALLER #2

46:53 Yeah. So like how do we reframe that and talk about that and teach them like it's really not as seamless as you guys think it.

PHONE CALLER #1

47:00 You...

PHONE CALLER #2

47:01 Know. So those are the things that I'm trying to have better contracts around and being to have better.

PHONE CALLER #1

47:07 I think we're gonna see more and more of things like that too with these accounting packages trying to compete with the new things in the market, you know, like the spectrum in the best of the world.

--- Pricing ---

PHONE CALLER #2

47:17 Dynamics. Yeah.

PHONE CALLER #4

47:20 I got... the guy I'm talking to you is paying 25,000 dollars if you'll connect to.

PHONE CALLER #1

47:27 What?

PHONE CALLER #4

47:28 Yeah.

PHONE CALLER #7

47:29 How many people is that for 20?

PHONE CALLER #1

47:35 That's over price for?

PHONE CALLER #2

47:36 It does. Yeah.

PHONE CALLER #4

47:38 I was shocked when he told me that it was like, wow. So we're not far off and imagine the difference.

--- Pricing ends ---

PHONE CALLER #5

47:45 Like 95 percent of these service companies go to that though because it's easy. You know, that they don't see value in it necessarily. It's just simple and it's easy for them to go to, right? And it's usually, it's a lot less expensive. So, I think that's where we can kinda like, I think Matt does a really good job of this and positioning himself to be like, listen our R and dollars are going into service.

--- Accounting integrations ---

PHONE CALLER #5

48:04 This is what we do whereas, you know, your bolt on platform. They're worried about accounting only. So that's kinda how I've tried to go about that is just let them know that, hey, they're not looking to necessarily make the service side any better. They're really only spending their time and effort and money on the accounting side of things.

--- Purchase decision ---

PHONE CALLER #1

48:19 Yeah. No, that's a good call. Justin. It's also... making the decision seem easy. You know, people wanna take the easy alternative any day of the week, I mean, but we have to, we have to point out why the easy alternative is a short term play and not a long term play.

--- Purchase decision ends ---

PHONE CALLER #1

48:37 That's probably the biggest thing too. And, you know, our onboarding process is pretty amazing. Are, you know, everything that we have a lot of, you know, R and D services, things like that like that's where our money is going to. So those are all good things to call as well.

PHONE CALLER #7

48:55 I like that last question you have on this slide real quick just because I know Jack, you, I and Chris kinda talked about this yesterday in regards to Dev brown. Like did Bill about to come in and poison the well first? Do we have to kinda change the way we talk about things or are we going first or last in that process? Yeah, that's important.

PHONE CALLER #1

49:13 Yeah, it's really important because you need to know one, it's like you're the first thing we've seen cool. Did we check off everything on your list? Yeah, you did cool. Then what do you need to go see somewhere else to go make a decision? Or secondly, it's to your point, if it's a competitor that we know that plays dirty and we'll low blow it like all the time. Then we got to know and change our talk track and go after the things that know that we know separate ourselves. So, yeah, it's a good call up, right? And that's why we have to ask that question.

PHONE CALLER #1

49:51 So where do we go from here? Not as of today, I have to edit recap, but the end of this week, we're going to slow roll this out. Originally. We thought we wanted to have this be in Salesforce today, but we're not ready for that. I want to iron this out because you guys validated that decision today with our conversation about the different ways that this could be updated and the types of information we want to gather. So the next, like I would say for the rest of the quarter, probably moving into Q2, this will be a little bit more ironed out. But then over the next month at least and now I'll be out so I can't expect us to do too much but moving into March, we're going to be putting these fields into recap, having a space, I'm gonna put it in a section of like the Salesforce section, but it's not actually tied to Salesforce. Well, we're updating this information. So that's step one, putting it to recap. We need to be updating it there. We're doing our pipelines and recap. So it's an easy place for us to go look and measure this information. The second thing from there is utilizing Gong scorecards for how we're getting this information. Obviously, we know that it's not going to be all on the same call but we're going to be, you know, creating scorecards to say like how well did you get this information or what's outstanding? So that we're in call reviews, it's an easy thing to say. Hey, this is what we're still missing.

--- Implementation and ongoing support ---

PHONE CALLER #1

51:13 Are we on the same page? And you all can be like, yes, I know that I need to get this information on our next call stuff like that. Moving forward, the idea will be this information is going to be pushing to Salesforce because it will then allow us to have a, not only like a workspace score that we're getting today, but also like a deal health score. So we're going to be able to put some like numbers next to these, what we're inputting. Eventually. It will allow us to track a ton more data so that we can see what a healthy deal looks like and what you need to have, you know, to make a closed one. So that's the long term goal that's getting us deal health scores so that we know how far you are from actually close wanting this thing or getting a decision right now. We just need to start tracking it. And the easiest way for us to do that is doing it recap, we're only doing it with our team right now and then we're eventually once we kinda figure this out and what's working best, we're then going to roll this out to the

other teams and make this a standard process for us with our qualification and evaluation standards. Any questions about that?

--- Purchase decision ---

PHONE CALLER #6

52:21 I just want to take a moment in stress with us only rolling this out to this team. It really is a chance for you all to give us some great feedback on what you think is good for helping implement medic. What you would have liked us to give you when trying to implement this.

--- Purchase decision ends ---

PHONE CALLER #6

52:36 Just any feedback you have would be phenomenal because we really wanna make sure we're nailing this when we roll it out to the other teams.

PHONE CALLER #1

52:44 Yes, it's my max here, so he will be helping us do this a lot better than I can. But he he'll take feedback, will about taking, he can help implement easier ways for us to absorb this information, execute on it.

PHONE CALLER #6

53:01 Yeah. Feel free to send me slightly passive aggressive slack messages about how we haven't made it clear enough on what questions you should ask for medic. I'll take it, probably send you back a slightly passive aggressive message and then don't worry. We'll fix...

PHONE CALLER #1

53:13 It.

PHONE CALLER #1

53:17 Thanks for the transparency. Max sounds great. So in conclusion removing from dance to medic, this is gonna take some time so that's where we're slow rolling this out. But at the end of the day, this is going to help us make sure we're working on deals that are of quality. We know what we need to go get and helping us forecast and have very specific, you know, pipeline conversations. It's going to help us, you know, with all the tools we have now and adding this process, we're going to get down to the nuts and bolts a lot faster. And this is all tied in to increasing our win rates and specifically in the mechanical space which is a little bit more complex. You guys are gonna have support. I'm gonna talk with Anna today about how she can support you all engaging this while I'm out on paternity leave. And then when I come back, we'll get right back into it and start taking this to the next step. Any questions? Comments? Anything we have a couple of minutes left, but any takeaways from today's, training? I appreciate everyone's participation.

PHONE CALLER #1

54:27 I think it's it'll take some time to digest, but I felt like a lot of this is common sense for us. It's just a matter of all, right now. We just need to start.

PHONE CALLER #1

54:42 All good.

PHONE CALLER #4

54:42 Yeah.

PHONE CALLER #1

54:45 Right. Well, guys, thank you all again for participating in talking through this sort of validating some of the stuff that Mac and I have been thinking about.

--- *Purchase decision* ---

PHONE CALLER #1

54:53 Now. We need to, you know, pursue this feedback is going to be much appreciated. And I hope you guys see value in this. So we'll cut it short here and let me know if you guys have any questions and we'll obviously make this stuff accessible for you guys so that you guys can read these questions and definitions of what not?

--- *Purchase decision ends* ---

PHONE CALLER #4

55:11 Jack, one last thing I love this 10 am training time.

PHONE CALLER #1

55:19 West coast, yeah.

PHONE CALLER #4

55:21 We stick with that.

PHONE CALLER #1

55:24 Too, I was able to wake up and not being a panic about what I was doing.

PHONE CALLER #4

55:31 A lot of engagement from everybody, you know, it's fantastic.

PHONE CALLER #1

55:34 Coffee is kicked in.

PHONE CALLER #4

55:36 Yeah.

PHONE CALLER #1

55:38 Do we know to?

PHONE CALLER #3

55:40 Jack, I got some questions pod dashboard related if you got an extra second?

PHONE CALLER #1

55:46 Yes, what you got.

PHONE CALLER #3

55:48 Okay. I guess I'll...

PHONE CALLER #2

55:51 Well...

PHONE CALLER #3

55:51 I don't have to share my screen but where the mid market demos booked for month to date, it's just showing no demos booked at all and there's been at least one that I know of that's been booked this month and qualified and it's still not showing up here. Okay? It's just a lot of these sections are not correct. Yeah, they're not accurate.

PHONE CALLER #6

56:12 Quinn. We just under February. Is that possibly why or did demo already book?

PHONE CALLER #3

56:18 No, it's been all past last month too.

PHONE CALLER #6

56:21 Okay.

PHONE CALLER #3

56:22 Perfect. Makes sense. Yep.

PHONE CALLER #1

56:24 All right. Yeah. Justin pointed out one of the reports earlier, like the open pipeline shows everything. It's not specific to actually mid market pipeline for your territory. So, I think that I think all these reports might need extra little TLC. I think we might have, we wanted the dashboards to be created last week so that we could review them, but I think there might be some bugs. We just might need to clean up to

make sure they're 100 percent accurate. So the, you said that's the demos booked, quarter to date or month to date report?

PHONE CALLER #3

56:56 Yeah, demos booked on month to date. And then another thing is on the accounts that are untouched a majority of mine that I went through already. And maybe some of you guys have been running into the same thing. The tech counts just not in our line size. But the reason for it that I'm seeing is that it's updated on the name of the op, like it'll have the name of the op and then parentheses whatever how many times that they've done a demo with us.

--- Parts management (inventory) ---

PHONE CALLER #3

57:21 And then the update tech count, but it's not updated on the actual account itself. So the two tech counts are different. And the tech count that's on the op itself is what they're pulling. I think Mac, you can tell me if I'm wrong the data to put these accounts in our line size.

--- Parts management (inventory) ends ---

PHONE CALLER #3

57:37 So what I'm trying to say is that I think if we start updating it on the op instead and maybe on the name of the op, then that will fix some of these accounts that are getting into the mid market on activity list.

PHONE CALLER #1

57:54 It's go ahead mark.

PHONE CALLER #6

57:56 So, I know there's a very specific field in Salesforce. I can't remember the exact name, right? I think it's a number of service techs, and that is how it gets put into line. I think Greg review in. So you're saying that number is incorrect, right?

PHONE CALLER #3

58:11 Reflect the name of the op yep.

PHONE CALLER #6

58:13 So, so, yeah. So like let's say an ops getting booked and it's 20 texts, but the actual count size is showing like 15 or something. Is that the difference?

PHONE CALLER #3

58:22 Yeah. Okay. It'll be like the ops book for 20 and it's got it on the name of the app, but the actual tech count on the app itself is like still at five from like three years ago. It's still falling into the wrong category when we're prospecting.

PHONE CALLER #6

58:38 Okay. That makes sense. That's definite something we can talk to ops about and that's probably maybe a process change. We're going to have to think about in terms of getting the SDRS just to update that on the account. So.

PHONE CALLER #2

58:49 Cool.

PHONE CALLER #1

58:49 Yeah, this is all part of the information. So, part of the conversation that we had with the SDR team or the managers is like what information and account information do they need to be updating for us? Because they're the ones, you know, kicking out the doors and figuring this out so that's help for us to know? Is that something they need to be updating? Mac? Can you make a note of that? I feel like sales ops this week. We have a lot to talk about.

PHONE CALLER #6

59:20 Already taken it down. Now, we'll bring it up tomorrow.

PHONE CALLER #1

59:23 Awesome. Thank you. Cool. All righty. Well, thanks again, guys. Let me know what questions you'll have. We'll get more direction and regarding goals. I mentioned this to Brett earlier today, but you guys can expect documentation on that Friday to sign off on your new comp plans and that will be then updated with captivate. So that's the timeline for that.

PHONE CALLER #2

59:49 So we'll get that through capital.

PHONE CALLER #1

59:51 I'll update it'll, be like a whatever sign. And then I think like Billy signing off, everyone's like there's a level chain and signing off on everything.

PHONE CALLER #2

1:00:00 About that today. So I was gonna ask you when we're gonna get that, so.

PHONE CALLER #1

1:00:05 So that plan is Friday?

PHONE CALLER #2

1:00:07 That to then be updated?

PHONE CALLER #1

1:00:09 Thanks for your patients on that... alrighty. Thanks guys. We'll talk later.

PHONE CALLER #7

1:00:17 Thanks Jack.

The End