



Fox Valley/Ethos quick sync

Juanita Guzman with ETHOSystems
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Participants

SERVICETRADE

Juanita Guzman
Account Manager

Tanya Eney
Partner Manager

Eric Feickert

Jon Bakker
Account Manager

ETHOSSYSTEMS

Stuart Blumenthal
Practice Director

OTHER

Shannon Beresford

HannahSarradet

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Transcript

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TANYA

0:00 Hello, we're going.

JUANITA

0:01 Hi, are you going?

TANYA

0:03 Are you again?

JUANITA

0:07 I'm good. I actually just had a drop early for, during an inspection manager call and I just left more confused, than I entered. But that's okay. There's just so much going on with inspection manager that everyone's just trying to do their best to keep up.

JUANITA

0:32 Hi, everyone.

SHANNON

0:33 Hey, got.

JUANITA

0:34 Shannon, Stuart and Hannah. So, Tania, I know you and Stuart know each other pretty well.

TANYA

0:42 Well, yes.

JUANITA

0:44 We actually almost called your cell phone directly during our last call.

TANYA

0:49 I guess so fox valley purchased intact.

STUART

0:54 They went with contact. And then I'm trying to remember all the apologies. I just got back from vacation, a couple of days on vacation. So my brain is, shut off. But in guys, correct? So, we got on the last call and they were like, hey, we're... they were, it sounds like we're no one's on the same page at this point here because they're like what was the date they were pushing things out?

--- Implementation and ongoing support ---

STUART

1:22 Like were they wanted to be live with everything on in January and it was different from what we were originally gathering at this point, correct? Shannon, you remember better than I do. I think at this point?

SHANNON

1:33 Then they said it was okay for the end of February, but we were thinking it was end of March. So.

--- Implementation and ongoing support ends ---

STUART

1:39 But the whole thing, is that, they, you know, we gotta get, you know, I wanna make sure that the implementation of where we're at with the service trade side and the intact side, I wanted this all to go, you know, correctly. At this point, I want them all.

TANYA

1:53 Well, I think what's interesting for us on the service trade side is, you know, we, they had a big upgrade that we sold them. They bought partsledger, it's a big module and we're like, and then it was, they slash us for like, and then we're going to impact last. And so like the way it was implied to us was like six months down the road. So that's like when I saw this e-mail, like did they even buy? I hadn't heard anything like we thought they were still, you know, like kicking the can down the road, so.

JON

2:20 In the community. Hi, I'm John.

TANYA

2:23 I'm sorry, we just, Jon, I'll start.

JON

2:28 Okay. Everyone just has.

TANYA

2:30 I'll let you want to take back over?

JON

2:33 Yeah, everyone just has to say their name when they first talk or something.

SHANNON

2:36 We'll...

TANYA

2:37 Address?

JON

2:37 You all like and tell us three fun things about you?

--- Implementation and ongoing support ---

JUANITA

2:41 No fun facts on this call, but yeah, we can do a quick round of intros just so everyone on the ethos team knows how we're engaging with the fox valley team. So I am their account manager. I'm not involved in the implementation at all. I'm just their account related, business level, point of contact, John. You wanna go next?

--- Implementation and ongoing support ends ---

JON

3:00 Yeah. I'm senior project manager here. So I'm over the kind of entirety of this implementation from the service trade perspective. And so, yeah, part of this sync up is because I had very clear directives from both Anita and Mike on the sales side of this like our per view just from an implementation perspective is like don't even talk about Sage like don't even bring it up. Don't let them get sidetracked if they ask questions about Sage, talk to your folks about that. Like it's I'm not touching that, but increasingly we've been, they've been wanting to get some specificity around it. And, and anyway, so I'm sneaking into meeting agenda while introducing myself. So I'll shut up and I'm John.

STUART

3:51 And on our team Stuart, I run the into practice. Shannon is our implement or assigned to fox valley. So she's gonna be doing the implementation. And so again, they bought, they did buy last month and they were like, hey, we're ready to get going on. They're ready to get going on Sage intact, which is great. But we wanna make sure that it's an alignment with you guys. And then the last person on this call is Hannah are, and as our project manager, so she keeps us all on line.

TANYA

4:27 We also have Eric. So I'm Tanya, I'm director of accounting partnerships. And then we've also got Eric who was helping with the partsledger purchasing inventory side of things. So I think it's great that we're having this call without the customer. Then we can kinda get things aligned because, they got a little work ahead of them. I

think so between the implementation and the rollout of just service trade, you know? And then also the whole intact thing. So.

JON

4:56 And I think if I could part of the part of the reason why we started to realize like, okay, we gotta touch base with ethos here and figure out who's doing what because they did bring up a good point kind of passively. So Eric, keep me honest, or, you know, if you need to add detail. But essentially, so Eric is handling the parts of your side of the implementation which is for us, that means like, you know, inventory, and a lot of that kind of stuff. And so they're understandably trying to think ahead and they're going well, wait a minute if we set it up like X and service trade, how does that look in Sage, which is a responsible and totally understandable question.

--- Implementation and ongoing support ---

JON

5:49 It's just that we have set up a pretty aggressive for service trade standard, it's a pretty aggressive timeline for them to get up and running a service trade and it's just a field of weeds that I'm afraid to start waiting into. So I'm just kind of trying to keep us focused on the task at hand to get service trade core up and running. And by extension, get partsledger up and running at the same time. We're starting to run into questions around data structure to go. Well, wait a minute. How is this gonna show up in Sage? And I'm like good question. Not sure. So Eric, is that accurate to your experience?

--- Accounting ---

ERIC

6:30 Yeah. And to be fair, I think the expense accounts on the items are probably going to be the only issue we really have initially. And, I talked to Tanya and the rest of the accounting group about this. It does sound like we've had other intact implementations in the past where we just stick with default accounts and the integration will handle basically all the expense account steering based on job data and all of that.

--- Parts management (inventory) ---

ERIC

6:56 And I don't think from the parcel of your side, we will have any other integration related questions. It's just the expense accounts on the items. Really. So now that we've kinda figured that out, I don't anticipate any other big questions that have to be worked through on, the partsledger side.

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

ERIC

7:14 Anyway, I don't know if we have anything on the service right side that may be. But like the sprinkler divisions already up and running a service rate. So if there's

anything major that needs to be redone, we've already got a production environment that's running. So that's going to be an issue to figure out anyway.

STUART

7:30 And...

JON

7:30 I...

STUART

7:30 Think that's part of it too is that they, they're and I apologize for interrupting. I think that's part of the issue is that they have multiple divisions in one divisions over there on service trade, but the other one's not, and that's something else that they want to bring up. So, you know, kind of, my overall plan would be that... it would be twofold. One, is that what's the flows between the, you know, like who's you know, again going back to like Benson, who's the master, who all the flow is gonna go between the two systems, setting those, setting up those flows or documenting those flows. Okay. Partsledger, is the master of everything great model. We don't touch anything at that point. And then the other part, is that you go and look at, you know, and then it's coming up with an implementation, setting up an implementation schedule. So, okay, these environments are coming up next.

--- Accounting ---

STUART

8:27 This is, you know, so we're going to be setting a part of their back end system. Does that make sense? I think setting up that type of twofold?

TANYA

8:36 Yeah. Well, also, I would wonder too if they've got and I'm the newest to some of the stuff. But like if they've got all these different divisions, are they planning on like rolling in tact out intact out to like all these divisions? Or is it like a division one who's already on service trade is gonna roll out first but, and then, or is it like division one that doesn't have service trade nor intact is gonna roll out first? So maybe we need to help like kind of structure that and say, like what is your plan?

--- Accounting ends ---

TANYA

9:03 Because it could be that we're gonna roll out intact to this division that doesn't even have service trade. And, you know what? I don't know? I mean, I think, do we have any idea on that?

SHANNON

9:14 Can I ask a question real quick? Because I've had about five, six hours of calls with them this week on discovery and asking them like what are they doing?

--- Accounting integrations ---

SHANNON

9:23 What is their plan? What's being entered and what system? What are they looking to? And their understanding which was a little bit confusing to me is that pro core and service trade are going to communicate to each other and then service trade is gonna send that data down to intact.

--- Accounting integrations ends ---

SHANNON

9:39 And then pro core is gonna send it to intact. But is they're now where they have to worry about pro core with what they're entering in service trade? So I was like wait for that meeting and we'll talk later. Let's go.

JON

9:52 I just...

TANYA

9:53 Magically talking.

JON

9:54 I have no expected integration with.

--- Accounting integrations ---

TANYA

9:58 We do have an integration to pro for... yeah, yeah, yeah, we do. I can send you Shannon, just the little information it's really just so you know, it's very basic. It's basically like the whole concept of, the pro core intact pro core use me, ServiceTrade integration is that I've got a project that I need a service tech to work on. So the pro core integration can create a service trade job. You can schedule a technician to work on it in that time that's captured in service trade can sync back over. So, I guess if you technically didn't have a project in pro core, it could go from pro core to service trade. And then I guess service trade to intact, but that's a lot.

--- Accounting integrations ends ---

JON

10:40 Yeah.

SHANNON

10:40 Yeah.

TANYA

10:41 Everything. So.

JON

10:41 What it's for what it's worth Shannon that was not positioned by us, that was not discussed.

SHANNON

10:48 Okay. Yeah. I was a little confused. I was like, okay, this is interesting information. Let me draw that out and we'll find out more later. So really the only what they said is they're doing their inventory and everything in service trade, then their job costing for their installations. They've already set up the sprinklers they want to go forward with everything else that is regarding the installations and then other things related to jobs at being procure but then somehow all are communicating. Yeah. So that's what they said. I'm not saying that's what's gonna happen, but that's what yesterday?

JON

11:25 Yeah, for what it's worth and wanna, you know, ultimately... you know, it's your, you know, running customer. So I don't want to speak for you, but I wonder if ultimately we can kind of align a position to say, okay, I, Jon didn't know about pro core integration requests. So let's keep on the straight path to get what we have scoped implemented and that pro core thing. We can, we have other teams here at service. You know, we can get professional services to, you know, look at that and help out with what that could look like in the future. But here's, part of why I keep... I hope I don't come across pushy. I'm just extra conscious of timelines I'm gonna pull up.

STUART

12:18 Well, just.

JON

12:19 A real rough thing of how, what we had in place with them. I know there's a lot to look at. But essentially, the thing I just wanted to point out is we wanted them live and using service trade at least like for instance with the sprinkler division by the end of November and really the rest of folks using like alarm and stuff like that in the middle of December. And so that's what I was referencing when I said we kinda have an aggressive timeline with getting service trade up and running. And I've purposely kind of had blinders on to be like, hey, I was told this is an aggressive time line and we haven't you know, this is including intact and any kind of scope. So we're gonna charge ahead with this stuff. Will also tell you it bears mentioning on this call that, you know, wherever we're at on this chart, I guess we're here on this chart. They're already behind plain and simple. Fox valley has not given us all the data that we need even though we were on time with asking for it.

--- Implementation and ongoing support ---

JON

13:28 And they also have not what we call our, we call our training like videos or certifications. They have not done that either. So already we're seeing them running behind our expected timelines. But hopefully we have enough cushion built into this that it'll absorb and it'll be fine. But it's worth mentioning that already at this point, even with the really spelled out timeline that we built with them that they agreed to, they're kinda running behind on things on their end.

--- Implementation and ongoing support ends ---

JON

14:03 And so my fear is... that's what I kind of mentioned before saying like I feel like there's this field of weeds to walk into with pro core and all this stuff where I'm sensitive to wanting to get it right and not giving you guys a hard attack in the future by being like, you know, I don't want to go. Hey, I'm out service trade is running. Good luck. I'll yell at, you know, over there ethos because, you know, you guys got a mess. I don't wanna do that to you at the same time. I just wanna make sure it's sticking to what their expectations are, but.

STUART

14:37 Well, I think part of the issue guys. Sorry, I'm gonna just jump right in here. So think part of the issue is that when we were on the kickoff call, they were like, hey, we told service trade to communicate with you. And obviously we were like that, was that immediately on that kickoff call? That's when I reached out to Nita at that point and that's where this?

TANYA

14:58 Are coming from. So.

STUART

15:00 My recommendation is that again, they're not good at communication themselves. They're not good at staying on track there. So my recommendation at this point is the following one is that we just get on a unified call with them and we got to get on a unified call with them and kinda come up with, okay, we're not gonna develop the plan in front of them because that would be a bad thing, but we need to get all three, you know, get all three of our companies on the same call. Make sure that, you know, at this point here that that's the schedule that they're rolling out the other companies. What is their plans for intact at this point? Here? Are we really, are we really taking them? Are they really going with service trade? 100 percent part of, rolling that out in January and then taking intact at that point? Are we doing the, how much intact can they handle? Because John, going back to your point, if they're not able to maintain what they're doing right now within, I mean, with service rate, are they able to pack tack on another product at that point in order to implement that? So those are my questions at this point here. I think we need to just get on a call with them and say, here's the plan we've talked... we need to get them on a call. And, you know, now that the two adults have now talking to each other, it's time to us to talk to the child.

JON

16:22 Are you all working with Alex steer over there?

STUART

16:28 You? Okay, yeah.

JON

16:31 Okay, cool. I just wanna make sure like that I've seen that happened before where that's another layer to this where we're working with different people and they're not talking to each other so that's at least good that Alex is privy to both parties already. Yeah, I think that's great. I think it's a great idea. Stuart I have in place. I already have a call in place. I could invite you all to pending your schedules, of course, and, you know, we're happy to make a call happen, but I have one set up already for 10 am on Tuesday at 10 am eastern on Tuesday. Does that work for folks? Otherwise? Obviously, I'm happy to help you schedule.

JUANITA

17:15 Pacific Time, right? Stuart?

STUART

17:19 Yeah, they're...

JON

17:19 Perse?

JUANITA

17:20 Seven a. M.

JON

17:22 Yeah, never mind. Yeah, not gonna make you guys.

STUART

17:26 No, no, no, we're all over. I mean, we're all over the place, but so we're I mean, we're all over the place. I mean, Shannon is early. I'm flying back from. I'm sorry, is Tanya? I'm trying to look up to your information and making they can be doing some due authentication code. Anyway, what I'm flying back from New York City on Monday on Tuesday morning. So I'm not available for that call. You know, again, I think that having all of us on there is important. I'm looking at schedules. It looks like Shannon, I got Shannon's calendar, my calendar. I'm looking like we're all available Wednesday morning at eight a M. Pacific Time, Wednesday morning at eight a M Pacific Time. I don't know if that works for.

JON

18:26 The risk of sounding dumb, confirming that's 11, correct? Eastern?

STUART

18:31 11 eastern. Yeah, I'm I'll find 88 pacific 10, central, 11, pacific, 11 eastern.

JON

18:39 Yeah, I have that open.

JUANITA

18:46 That also works for me.

STUART

18:48 Hannah, can you move your meeting on that time? I know you, I didn't think it was yours is more of a tentative meeting anyway, so.

JUANITA

18:56 Yeah, I was gonna say you can include me and all my with my thing.

STUART

18:59 Beautiful. So I'll be traveling.

TANYA

19:02 I don't think I'm really needing unless there's something that comes up I can, you know.

STUART

19:05 I honestly, Tanya, I'm gonna let you off the hook this time and I think, if it's John, Eric, I think you should be on that call. And Anita, I think the three of us, I think we have the six of us minus Tanya. I think we're I think we're golden at that point.

JON

19:23 When it, and Eric, you're good for that time, Wednesday at 11... correct?

ERIC

19:31 Yup. Yeah, I'm good.

JUANITA

19:33 I'll be in the office that day as well. I don't know if you all plan to be. So maybe you can just grab a conference room and take the call together.

JON

19:44 Yeah, I'll see if I can make that work.

JON

19:51 Cool. Did, did you all have a preference, Stewart? Did you wanna make that? Did you want us to make that invite that to you invite you to that?

STUART

20:02 Why don't we do this? Why don't I, why don't you send off the invite and just send it off and say, hey, I wanna make this guy, we wanna make everyone look good. So, and why don't, you say, hey, fox. We, we had a great meeting with ethos and our team.

--- Purchase decision ---

STUART

20:20 We discussed it. We would like to set up a meeting. I got the short end of the stick and asked to schedule the call, but now all joking aside, I think that just say we had a great meeting as promised. We had a great meeting. We got things figured, you know, we want to set up a meeting and then Jon, you and I, and we can kinda take the, in Eric. We can kinda take the lead on it. I kinda have an idea of where we go from here.

JON

20:43 Cool. And I'll just kinda be strategic with my Tuesday call and just kind of try the red carpet a little bit, into the Wednesday.

STUART

20:55 Call beautiful.

SHANNON

20:57 I will say, I think it's important to just kind of give them a brief like high level of what they need to focus on first too because it seems that they're pretty confused about everything like you're saying all at once and what goes when, what system requires what. So if we just go from, hey, here's, the priorities of how this has to go down and what's required from each system and say that so that we're all on the same call, then I think they'll be a little more a little bit better. They'll be more ready than they are now because even trying to get answers from them, they're like, I think that's how we're gonna do it or are we doing it this way or what system are we putting it in? So.

--- Purchase decision ends ---

JON

21:37 What, what I'd like to do is use those slides that you all had. I'm not sure if that was yours or Tanya. Because, the other aspect of that just from working with a customer perspective is, you know, it can kind of be presented as, hey, let's review how we said that this would work. And that way it's we're sort of sementing, like, hey, this was discussed and scoped. Let's be clear about like how this will look and work. Am I correct that you had some kind of flow chart with that? Or am I making that up? Am I thinking of someone else?

JUANITA

22:20 I did share a flow chart with you just it's a high level overview of how intact and.

JON

22:26 Just fox vale. I've never seen that.

JUANITA

22:29 They, they have seen it. So, I think what they've forgotten about is, you know, the sales expectations that they set with me before all of this, so I can start the call with kind of just reminding them, hey here's. What we agreed to here was our Mutual action plan and it sounds like, you know, things have just gotten confused there all over the place and we just need to redirect that way they will be a lot more receptive to what we're going to recommend on the Wednesday call.

JON

23:01 Yeah... cool.

JON

23:09 Yeah, feels manageable to me from here, and I want to reiterate, I don't mean to come across as my per view as a project manager here is, I'm as plastic as the customer in the contract dictates in this case, fox valley was to be Frank was the one that was adamant with Anita about timelines. And so I'm gonna Refract that back. And I'm going to be really adamant about timelines. And only lately as we've run into some of these questions and concerns, has fox valley kinda turned that corner to be like, well, how come you guys are pushing us along and it's like a, this is the time you guys said. So if ultimately, there needs to be some pushing and moving around from my per view as long as it's good with fox valley and that's what they communicate, they wanna do for what it's worth to you all at like I'm good, with adjusting if I have to. So just so you guys know that I'm being a stick in the mud with fox valley because that's what their contract was with us, but secretly not really with you guys like, if we absolutely need to move stuff around like, we can see what we can do.

STUART

24:31 Okay. I think we're I think we're I mean, again, our goal is that let's get it. Let's make a realistic time frame. I mean, Shannon there, there's a lot. I mean, Shannon has got a lot on. This is a big project between pro core, you guys, it's a big project. No one wants to mess it up. Let's just, you know, we want it done, right? You know, we moved, we're all moving, but we need to move now in one single direction. I want them to walk away going. Holy crap. This worked really well. I want them to be a reference able account and we create a video and everything. So, you know, again, this is, I want this to be successful.

TANYA

25:07 Cool. Are they new to prop or do they just buy purple as well or do they have it?

SHANNON

25:12 No, they using it for just more communication purposes and not using it the way that they're going to be using it.

TANYA

25:21 Okay.

SHANNON

25:23 And when you guys have the call, you can even blame it on me, be like intact needs or I guess ethos needs to understand too like how everything is gonna flow together. And that way you don't feel like this is what we discussed. I feel like because we don't know, you know, if you need blame it on because.

JON

25:40 No, and yeah, yeah, I'm wording it tursely to all for the sake of brevity. But yeah. Well, I'm, I will position it firmly but gently, to fox valley that like, hey, I'm definitely, we're definitely asking questions about stuff outside of the scope that I was knowledgeable of especially with pro core like literally Shannon, when you said pro core on this call, that was the first time I'd even heard that they're using that or that they want that synced in any way. I was like, what are you talking about? So.

--- Accounting integrations ---

SHANNON

26:14 No, I was a little bit confused. I didn't I thought they were integrating Sage and talking pro core and then they are, but they're also doing pro core and service trade. And so that's where that triangle starts getting a little bit confusing to them. And some case, I'm going well, where is, where's the source of everything?

--- Accounting integrations ends ---

SHANNON

26:31 Right? Yeah, they brought that up. I think it was yesterday. So every time they mentioned service trade, they set pro core too. So, all right. Got.

JON

26:42 Yeah, that's news to me that's interesting. Okay?

STUART

26:45 Okay, cool. I got a call in two minutes. Anything else we need to address today?

--- Dispatch ---

TANYA

26:51 No, but congrats on the sale. Looking forward to working with you guys on this next customer. I know we got, we have Benson as, you know, so you guys have some background on it, so that's exciting.

STUART

26:59 Spencer seems to be happy. Is, it's not, it's just Michael. It's he's the unique over there but they seem to.

TANYA

27:10 Well, I think in his defense, he came in after, you know, and he got to make no decisions practically, you know, so that could be it too.

STUART

27:18 Yeah, but no things are going well over there. My goal is Sean and to learn. And, and Tanya, last thing I'll say is I really want Shannon to learn this.

--- Dispatch ends ---

STUART

27:26 Shannon has a good understanding of, you know, she's been in this space. She, she used to work for us at the, before. She worked for pro core. I call it the best spatial that anyone would ever take. So, I'm excited to have her when she came back. I was all excited and this is great to have her part, you know. So I want her to learn service trade and I think it's great to have her. I want her to learn service trade. So I didn't...

TANYA

27:51 Absolutely. So we can get national fire rolled out, sold and rolled out with intact. And.

STUART

27:56 You and I need to have a long talk about that one that's we need to have like a half an hour conversation there's...

SHANNON

28:04 More of that because...

STUART

28:05 They've been talking to, they talked to BuildOps. They've talked to, they have their own solution right now, and so.

TANYA

28:11 Course.

STUART

28:12 But they've talked to BuildOps. They've looked at everything they've looked at pro core. They've looked, this is a major, I will tell you and I know the people over there very well. Kylezigler. I know, her past husband and her previous husband. So there's a lot of history. She used to work for us. So we, you and I have to have a long.

TANYA

28:35 So I'll send you a note to catch up because I'll talk about California boiler too,
SO.

STUART

28:40 You, yes, because they're all upset, so.

TANYA

28:43 Yeah. All right. I'll send you a note after this.

STUART

28:45 Okay. Thanks. Bye bye.

JON

28:46 Everybody.

JUANITA

28:47 Thank you.

The End