ServiceTrade NorthBoundary Overview

Patrick ONeill with Pueblo Mechanical & Controls Inc
Recorded on 5/16/23 via Zoom, 35 min.

Participants

SERVICETRADE

Patrick ONeill
Account Manager

PUEBLO MECHANICAL & CONTROLS INC

Bob Ferron

OTHER

Topics

Transcript

PATRICK

0:01 Hello?

BOB

0:03 Morning. How?

PATRICK

0:03 Are you, Bob? Good. How are you? I'm well, thank you. Do we have Brianna with you as well?

BOB

0:09 Yeah, I'm gonna turn out video on. We are both here.

PATRICK

0:13 Great.

BOB

0:17 CS...

PATRICK

0:18 I cannot, but I can hear you.

BOB

0:27 Well, let's not worry about that.

PATRICK

0:28 Okay. We there's let.

BOB

0:30 Yes, anyway.

PATRICK

0:32 Well, actually, I can see you. No. So my name is Patrick Oneil. I'm one of the account managers here at service trade. The sort of the agenda for today's, call is I

want to, I know you all are leveraging or utilizing, excuse me Northboundary, in your sales operations. So I want to understand a bit more about what that looks like for you all, make sure you all are getting continuing to get value out of the product and then kinda talk to you all about some new ways to be able to reach out to us if you have any questions, comments, concerns about service trade and who we are, and how we plan on continuing to support Northboundary, and then talk about your upcoming renewal if that feels like a good bit of things to cover in this next 30 minutes or.

BOB

1:22 Sure does. And we'll we have some questions along the way as well.

PATRICK

1:27 Great. So, so, you know who I am, give you a little bit more context. I've been with ServiceTrade since 2017. I have handled, I spent four years doing implementation. So I implemented our largest client at the time. I think they still may be our largest client. So it's been a lot of years implementing folks onto the ServiceTrade platform. I made the switch to the account management team at the end of last year. So handling more of that business side relationship, which is what I am here. I'm here as your account manager within ServiceTrade around the Northboundary product. Think of me as your advocate. If you got that in the moment need for some support, I'm gonna give you some information. You can reach out to our support team. We've got here if you've got feature requests or things that are going on that you'd like to see in the product. You can point those to both me and our support team. We can handle that as well. So that's a little bit about me. But I'd love to hear who you all are, and how you all are leveraging Northboundary currently?

BOB

2:24 I'll restart and then I'll get it. Okay?

BOB

2:28 So, I mean, really on my side, I just kinda help with making sure that everything in work boundary... looks well tally and dramatically. So really just trying to learn how to make a better as far as, you know... better that, but that's kind of my role is and how working with.

BOB

2:56 Yeah, it's probably be easier if I went first, but I'll be a second. So I'm Bob, I'm the sales manager for pueblo Arizona. So that incorporates the entire state. We have three offices here, in Arizona, one in flagstaff, one in Phoenix and one in Susan. So we support all three of those offices and we'll get to the overall enterprise in a minute because it's changed quite a bit since we started with Northboundary.

--- Pricing ---

BOB

3:24 What we use Northboundary for solely is maintenance agreement. So, we enter opportunities. We don't use it as a CRM. We have Salesforce or CRM, but

Northboundary serves at least for right now as our, where we initiate a proposal for a maintenance agreement where we price the maintenance agreement, and the proposal that comes out of it. So that is really what we're using it, you know, really on the service agreement side, and that's across the Arizona platform right now.

PATRICK

4:02 Okay. And then out of, those three offices about how many sales folks do you have sprinkled through the, those three three offices?

BOB

4:12 I have 12 direct reports on the sales side to me, but also we have service estimators who use the program, service estimators here would be doing any renewal of the maintenance agreements. And also we'll do some of the pricing. So, so we have five, six seven seven. Of those, you know, if I look at our user list on here, I can find it. There we go. You know, we have a lot of a lot of people on our list, that aren't either with us or using the program.

PATRICK

4:49 Okay.

BOB

4:51 So actually... so we probably have 15 people that use the program, maybe a little bit less than that. Some service operations folks service managers do the, you know, the pricing updates within the program. And then my sales team.

PATRICK

5:11 Got it. Okay. When you say pricing updates. Do you mean, hey, this vendor used to charge you know, five dollars for this thing, but now we're charging 750 and we need to make sure that pricing is accurate. So sort of more of like an admin type of support. There is a...

BOB

5:28 Yeah, it would be, it would be that Patrick plus our labor rates. So, you know, anytime we have a labor rate change, they need to go in there and change it in Northboundary because otherwise, it's not gonna match and we're going to be under price, right? So.

PATRICK

5:43 Yep.

BOB

5:43 So that's the kind of me instead the service team like the operations folks do behind the scenes. And then my team, will put together the proposals, the estimates built, review with the operations team and then spit out a proposal for the customer.

PATRICK

6:00 Okay. And you said, in term, and so you're only using it for your maintenance proposals. You're not doing any project proposals out of it?

--- Pricing ends ---

BOB

6:07 No, we are not doing any project that comes out of another. We have another couple of programs that we use for projects.

PATRICK

6:15 Okay.

BOB

6:15 No problem. So no, we do not use it for that.

PATRICK

6:18 Okay. So mainly maintenance proposals. And, and you all, I imagine crank out a good amount of those every year about how long have you all been utilizing Northboundary?

BOB

6:30 A great question. And either be or is a meal to answer that question. But I'm gonna say, well, it's been between three and five years as far as I know, I've been here. We both been here the last two years, and I think, it was up and running a year or so prior to that here at la. So I'm gonna let's say between three and five years.

PATRICK

6:52 Okay, great. Great. And then do you, what are your projected plans with Northboundary? Do you, do you all foresee you continuing to utilize this? Are you getting value out of the product?

BOB

7:04 There's a loaded question. So, yes, there's value. You know, we are in the midst of changing over many of our operating systems, for instance, we just installed Salesforce as our CRM right? So, we're in the process of rolling that out to not just level of Arizona but what you're gonna hear of load a gen, which is our operating, not our operating company or what do you want to call lodge?

BOB

7:39 Is the...

BOB

7:40 Corporate, the corporate folks that run the enterprise for, pueblo is one operating company within about 12 or so across the country now under mode get really, they came out of, but anyway, I don't that. What was the question? I guys.

PATRICK

8:03 Yeah, that's why. Thank you for the additional context there. The idea was, do you find value in the product?

BOB

8:09 You, you?

PATRICK

8:10 Can, do you foresee you all continuing to leverage this in your tech stack?

BOB

8:14 Right. So, so where I was going with that is we rolled out Salesforce in Arizona. So we're not using this as a CRM, I know some folks do. And then, so we're just utilizing it, as the maintenance agreement tool. We also just recently are in the midst of conversion of our service group to BuildOps. So, you know, there's some things we can do within build apps, some things we can do within Salesforce. But for right now, at least we plan to keep Northboundary, at least we're exploring keeping Northboundary around as the maintenance tool. Okay? With that, we wanna ask some questions and I got some specific questions about managing the proposal and the documents and stuff like that within Northboundary, my questions are going to be more on, the enterprise. You know, we have talked a little bit about the enterprise, right? So we have Arizona and now let's say, we have an operating company in New Mexico. We're not saying we will, but what would it take or how would we, how would we configure those other operating companies if they were to use Northboundary?

PATRICK

9:38 Okay. So you're basically what you're asking, does Northboundary support separate offices?

BOB

9:44 Yeah, pretty much, right.

PATRICK

9:47 Yeah. So, and kinda, to further sort of take that idea and run with it, I imagine you're going to have different pricing for those different offices too?

BOB

9:56 Yes, yeah.

PATRICK

9:58 Got it. And then you're going to have different labor rates and burden.

BOB

10:01 Correct.

PATRICK

10:02 Okay. So, so vents is still here, right? I don't know if you had a relationship with 10 or that about 70 percent of the people I've talked to so far came to Northboundary through some sort of relationship with vents, right? And I don't know if it sounds like you all are, not that percentage because it was already stood up by the time, you came in. So the vents is still here. He has been the main driver and creator of Northboundary. He works with us for us now. So any and all feature requests are going to be vetted through our support team with Vince also being the liaison. We have a product manager that is also getting spun up specific for Northboundary that will be able to continue to create updates around the product. So, I know that I'm giving you a lot of fluff here, but the idea is that, yes, it does support office specific pricing office, specific burden rates, the ability to have different pricing structures for your different offices within one account. Now from a nuts and bolts perspective, like what buttons have we got a flip and what training? And where do we need to go to show you that? I'm not that guy. All right. Just full stop. That's not my expertise. Now. Anything related to other applications under our umbrella just by the sheer amount of years I spent supporting and implementing them. I am that guy. But from Northboundary, I'm still learning a lot every day. But from what I have seen what I have talking to with prospects. And as I am selling Northboundary as a standalone product into my clients, yes, that is going to be a supported workflow.

BOB

11:42 And...

BOB

11:43 So, is 10 still that person then to show us the announced how to use it?

PATRICK

11:50 No, no. So you all have access to our support folks. I got a name, Alex and a woman named Pan. They are, you know, you guys, you can, I'm gonna after this call either, you know, later this afternoon, first thing tomorrow morning, I'm gonna recap this. I'm gonna give you all the information. I can give it to you now, but you have access to a support team of folks that you can reach out to right now at Northboundary support at ServiceTrade. Dot. Com. I'll send you the email address. We are nine am to seven PM Eastern Standard Time, central or no? Wait, you all your Phoenix, if you're in Phoenix, you're three hours back at least for right now, right?

BOB

12:29 Yeah.

PATRICK

12:30 Right, right, right. It'll be two hours at the end of the summer. So, yeah. So you all have access to our support team up until five, four o'clock your time for now. I'll send you that information you all have. We, we are literally when I say literally, I don't mean it in figuratively, I mean, literally, we are putting in more and more help

videos, to videos. We're making all of this stuff available for all of our Northboundary clients. We're continuing to invest and into the product. We're only gonna make it better. Like I said, we're still selling it as a standalone product as well. So you don't have to be a service trade person, you know?

BOB

13:07 And that was one of the questions I have Patrick if we decide to keep boundary, is that still, are you gonna have to stand answer that? So you don't have to be a service trade customer to have no on.

PATRICK

13:23 That's...

BOB

13:23 Cool. Plan on changing that in the near future.

PATRICK

13:25 That, you know, what, you know, I am just a cog in the wheel, but my understanding is we are very excited about selling Northboundary as a sail product.

BOB

13:35 Yeah, it's great for the support thing. And, you know, between us, you know, vice did support us and, you know, I didn't have a relationship with Vince, but, you know, when we really needed something, we call Vince and there were times when it was hard to get a hold of it because of the single man band, part, right? But when we did get a hold of help... but, you know, I think I look forward to and I'm sure we do a support team to help us that's their being because we've needed a lot of things that we've just tried to work through, yeah.

PATRICK

14:08 Absolutely, absolutely that, you know, you really hit the nail on the head with sort of kinda encapsulating what was versus what is now. So I like to think that the family has grown right now. You have me, who is your dedicated business side resource? I'm always available. You got any problems, questions, concerns, you know, let loop me in. Let me know. Like I said, I'm here to advocate for you. So if you do reach out to our support team, all right.

--- *Call Setup* ---

PATRICK

14:33 And you're like, hey, I need, I got questions and you're not getting traction which won't happen or you haven't heard back in a minute, which generally won't happen. You come to me and I'm the enforcer, I go figure out what's going on. I drum up support. I get people reengaged, I get them to reach back out to you. Again. I'm an advocate, not an enforcer. So you've got me, you've got Vince, who I got talk to Vince every week. I got a meeting with him tomorrow. We're doing demos on Thursday with the client. So he's around. But really this exciting part for you all are

going to be the Alex's and the pans of the world, which now we have way more resources available to help you all out for that. In the moment. Hey, I've got a question. I wanna do this. Can I do this? I've got some questions about that, that's that door is open to you all nine am to seven PM, Monday through Friday. Have at it?

BOB

15:26 That's great.

PATRICK

15:27 About...

BOB

15:29 So, so you mentioned renewal, so are we coming up by the?

--- *Pricing* ---

PATRICK

15:32 Yeah, yeah, yeah, that you.

BOB

15:35 An annual is an annual thing or I haven't looked.

PATRICK

15:39 Yeah, no sweat. So, the, you know, the way that we are tracking you all right now is that you pay 7,400 dollars a year for Northboundary. So that's the annual capital expenditure for you all to leverage this tool with this. So, yeah, the renewal I believe is coming up at the end of this month. So we're looking to write around June one. So we're trying to get out ahead of all this stuff. And try as we might, you know, we're planning a pretty fierce game of catch up, but I'm glad that we're talking here like mid month so that we can kind of talk about going into the renewal, see how you all want to continue to leverage this and do that. So, yeah, we do have an impending renewal. We got you all as paying 7,400 dollars a year, for Northboundary. Does that jib with your recollection?

BOB

16:25 Yeah, it does, this, is it an annual type thing or is this multi year normal?

PATRICK

16:30 So the, well, we'll talk, we can talk about that.

--- *Pricing ends* ---

PATRICK

16:34 So right now, what I'd love to do is be able to get you all into a three year deal so we can log in with Northboundary for the next three years and give you guys the opportunity work in a little bit of growth. But before I kinda get to, the, that element of it, what I'd like to do real quick is kinda talk to you all about how we're how we we're addressing legacy clients for Northboundary, and how we are switching up the pricing model for Northboundary. Okay? So there's a couple of different things that I want you, to latch onto that there, the first is, so, the pricing, how we're addressing the pricing moving forward. Now, this is not for legacy clients, right? So this is for net new people. Like if I sold you, not, Northboundary is, and product today, this is how we think about it. So we do a user based subscription. So, but it's not anybody and everybody that's in the system. Okay? We are focusing in on what we call sales users. So sales users in Northboundary, are going to be the people that are doing what they do. They're selling, right? They're creating leads, sorry that you guys don't use the CRM but they are creating proposals. They are sending those maintenance proposals and the supporting documents. So anybody that is a they're driving the sales motion, getting those maintenance proposals put together, interfacing with the clients sending those out. Those would be sales users. Now free users or other users are people that support the sales users and key activities like asset data creation, data entry, talking about your pricing, right?

--- Pricing ---

PATRICK

18:11 Talking about making sure your labor rates are correct. Free free users eventually will be able to have read only permission to review proposals and pricing. So, hey, like if you're, if a proposal is going out the door for a threshold amount like half a 1,000,000 dollars, and Bob you at that point, you got to approve it before it gets sent out, being able to have approval users in there would be considered like a free user. So thinking about sales users as the ones creating the proposals versus, the users that are supporting that motion. That's how we are sorta redefining the pricing model of Northboundary. What questions do you have on that?

BOB

18:52 So the 74, how it's configured right now is because we're legacy, I mean, I get that. But 7,400 dollars a year. Is there a limit on the number of users we have, or is that just a flat fee for the way we're set up?

PATRICK

19:06 So, the way that vents had done,, it was a flat fee, I think based on offices, right? So, if you have more than one office leveraging Northboundary, that's how he did his pricing, right? So for you all, I believe that pricing model that you all have baked in was for those two to three offices that's how he?

BOB

19:24 Yeah, they'll be two. There will be two of them, yeah.

PATRICK

19:26 Right.

BOB

19:27 Definitely doesn't have any.

PATRICK

19:30 There, so yep, that tracks. So and again, so one of the reasons I was asking at the front was like kinda help me understand like your sales users, right? So the way that we are for legacy clients, right? We're we understand, we want to understand how many people do you have using the system? Now? How many people have you had grow into the system over the course of the last three years? Right? Because what I wanted to do is I want to understand what's you're leveraging. Now, I want to build in a little bit of growth for you all so that you can continue, to scale up your operation. But I'd also love to lock you in at that three year deal. Now, you all being a legacy client. Okay? The pricing is going to be a little bit different for the legacy folks, net new business. If you were gonna buy Northboundary right now, you would, the way we're pricing it out is it's 99 dollars a month per sales user. So it's 1,188 per user. Okay? With a minimum of three users for Northboundary. So, for the legacy clients, though we wanna look at the rate that you were paying, okay, you are paying 7,400 dollars. I wanna understand how many sales users you have. I want to build in a little bit of growth. And what I'd like to do is lock you into a three year term with Northboundary with the first year being just a 10 percent lift off of what you were paying. So for year one, if you all were to sign the proposal at a 10 year lift over three years, year one, you would be bumped up to 8,140 year two would be eight nine five four. And then year three, I'd be nine eight four nine. Over the course of those three years. Now that's a 10 percent bump over where you started at the 7,400 dollar mark. With that, I'd like to be able to build in a little bit of growth around sales users about who are you using now? How many do we want to kind of build into this thing? You know, one two. So you all can continue to scale up. But the idea being that once we have that number and we get you locked into that contract, if you were to add that, let's say 15 sales user in year three, that new user within be subject to the current pricing of, the revamp pricing of 99 dollars a month or 1,188 per user per year. So we're trying not to just immediately say you've got 12 sales users. So you were paying 7,000 dollars now? You're paying 15,000, you know, and nothing's changed. So we really wanna make this a nice gradual incremental growth. We want to build in some room for you all to be able to add some users and grow your organization. And I'd love to be able to continue this collaboration with our companies moving forward.

BOB

22:07 Yeah. So, just real quick, I'm looking at the user list and, you know, even though I have 12 direct sales reports, some of those are project sales people that don't use this at all. So I just counted, we have basically have seven users that are sales people, that use the program. Okay? And then the rest are our administrative folks or service operations folks.

PATRICK

22:34 Got it. And then of those let's say sales users and your tenure there, you have seven. Now, how much do you have two years ago?

BOB

22:42 This program, five I've added to in the last year.

PATRICK

22:46 And then if we're thinking about, you know, projected growth, you talk about, a corporate partner, a parent company like, I imagine there's probably some, you know, what's the word I'm looking for here, aggressive growth plans potentially for your organization, what?

BOB

23:04 Yeah, yeah.

PATRICK

23:05 Right. Everybody, right?

BOB

23:07 Yeah, it.

PATRICK

23:07 It only goes up into the right correct?

BOB

23:12 Year like we did last year.

PATRICK

23:14 Expectation... absolutely. Yes, sir. I feel that pain about every other year about every other year, so.

BOB

23:24 So, so back to the pricing part, if we were to look at this and I know this might be above what, you know, what we're talking about today, but if we look at the enterprise level, we call it was pueblo.

--- *Small Talk* ---

BOB

23:36 Now we named motor gen. So motor gen is over the top and then pueblo one of the users and, you know, Rocky mountain can in Utah might be a user and Travers in New Mexico, might be a user or?

PATRICK

23:54 Infinity corporation might be one two. Yeah.

BOB

23:57 Is one of our companies as well, right? So I think we have the 14 now. Yeah. So there's 12 different operating companies, products that are spread from California all

the way to South Carolina, and there will be more. So there will be both that way but they don't have all the same systems that, are using Northboundary, right?

BOB

24:21 At some point, we're gonna want everyone to be consistent whether it's Northboundary or the product. We are all going to be doing the same thing the same way over the course of time. So I can't answer whether that's Northboundary now. But I need to know from you guys how that would look if we were to expand that across the enterprise.

PATRICK

24:40 Yeah. So like right now, you know, I had a call with Jim stag from infinity and mark, who's the service manager, right? And, I kinda had a little bit of a preview of sort of how you all are structured from a macro and sort of a micro sense. My understanding was that you all right now in your journey, of enterprising, we'll call it of these desperate systems and you all ask Jim, I was like, so hey, like is there now, does everything roll up to one figure head now? And he said no as far as you all in terms of profit centers and I'm using that term very loosely. But as far as your sort of own organizations, you're also very much your own bit, right? You've got your own systems. And so now if at some point image formerly pueblo decides, hey, we want to consolidate all of this up into one contract for everybody. We wanna take a look at that. Let's talk. I mean that's the type of stuff that we get excited about. Obviously, I think that from our perspective, we would want to try, and have you all rolled into one if and when the time comes for that. But I also been in this game long enough to know that the enterprisation, of organizations takes a while. So I would say, let's I would love to address now is now and then if things shift, I'm here, man. We're here to talk like the last thing we wanna do is have you all not utilize something that brings value to your organization and ours. So, I know that may not be the answer that you want. That is a concrete, hey.

BOB

26:18 Is a good start. It's a good start.

PATRICK

26:20 Yeah. You know, like we're here. We're here to work with people. We're not here, to work against them. So.

BOB

26:26 Okay. So, yeah, yeah, we're gonna try to utilize, the support team to redefine how our product looks because we, one thing we and I don't like is how the product has looked historically year and I don't know we built it or built or consolidation. I don't know, but we don't really like the product that's been spitting out for our customers. So we're in the middle of revising that. It's been a struggle getting to the things behind the scenes of Northboundary, it's not as easy as just saying let's go change that page with the proposal. So, and it's pretty deep. So we'll really need the support team, to work with us to do that, but I think that's a really good step. We want to change pictures. We wanna, you know, there's a lot of things that, we think

could make it look a lot better for our customers. And there's a lot of things that we don't want to incorporate that are kind of built in to Northboundary that we don't think we need, in our contract. Does that make sense?

PATRICK

27:33 Absolutely. And I'm thinking of this just sort of having seen the proposals. It's more of a form over function right right now. You want things to look a little bit different, more customized to what your feel is, and you just need the ability to plug in with some resources that can help you understand how to address that change.

BOB

27:51 Yeah, that's accurate.

BOB

27:54 It almost might make sense just to set up some time, to kinda present the product but it's almost as if we're not current customers especially because it was already sold on the team. So we're kinda jumping and trying to figure out to, but maybe it is more user friendly than we realize or there's more than that we can do. So I'd love to learn about it as a new.

PATRICK

28:19 Yeah. Well, so the thing about that I would say is that because you do have experience with the product and I think you probably have a couple of ideas of areas you do want to see adjusted. Let's start with what we know to, but because then you have you're like it's you know what I'm saying? Like when you come to our team and say, hey, these are the things, we really would like, to do help us there. Then let's focus on the areas that we know about that we want to affect change. And then assuming that that'll you know, that relation on ship starts, to hardenthen. I think we work out from that, if that's okay with you because I feel like in terms of just resource allocation and like sort of starting brand new to somebody, you know, you all do have experience. You probably have a good idea of where we can focus our time so that we can make these valuable meetings right off the bat. Does that feel like? I mean, and I love your idea and we still want to get you the opportunity to learn some things. But I do feel like having, a goal in mind will make things happen faster. You see, what I'm saying is if you're picking up what I'm putting down...

BOB

29:23 I guess, but I don't even really know what our capabilities are. I just know what we have and truthfully in the past when working with events and trying to figure out how to use the system, it wasn't explained very well to me and not necessarily is just the way of doing things. So I really don't know much about it. I'm not in the system very much from what I do. I don't know it more than we definitely struggle on the back end of time the changes and not even knowing where some of this content came from. I really don't know, I think some of it is auto, so.

PATRICK

30:05 Yeah, no, I.

BOB

30:07 I don't know what I want change or say, I just know what I don't like, I guess.

BOB

30:11 Yeah.

PATRICK

30:11 Well, hey, that's what I'm just saying anything we can latch onto, but it's like I don't like this. Tell me, you know, we can work out from there.

--- Wrap-up ---

PATRICK

30:19 Either way. We're gonna, I'm gonna loop you in with the support folks, Alex and Pam. They're real quick to be like, hey, let's hop on a call. I wanna get some more information. I'll even sort of when I loop you all in via email, I'll go ahead and preface that with, hey, I think, you know, re, has some experience, but I think getting on a call, getting kinda right to the heart would help everybody out to us to get to a resolution faster.

--- Wrap-up ends ---

PATRICK

30:42 So let me set the stage. I'll loop you in the email with those folks. And then like I said, they're real good with getting calls setup and helping you all out with, to get, some resource allocation to get more knowledge around the product for you.

BOB

30:55 Part of how we've changed in the last year and a half is that when I joined we had, you know, let's say seven users or seven sales people. Only one or two were using this program, and the rest were putting it on spreadsheets, and using word documents and sending their own stuff out. And so we had to, we had to consolidate that into one process. Since we had invested in Northboundary, we chose to make sure everybody utilizes the program that was sending out any kind of maintenance proposal. So we've gained users just because we force them to use the program.

PATRICK

31:33 Well, you know, I don't think that's a bad thing. I think that when we talk about businesses that are in growth mode, I think there's two things that really matter. And I think that's efficiency, operational efficiency and consistency. You, you got to Inspect what you expect, right? And being able to have a system like Northboundary, with this out of the box sort of the rules of engagement are built in. You can standardize your proposals. You can make sure the pricing is consistent. I mean, that is why you want more and more of your sales users in this thing because it provides guard rails. It provides you the ability as a organization to look back, and look at the data around your proposals and see your growth and measure that. So, yes, you should be pushing people, into products that help you maximize efficiency, maximize

consistency? And we just want to see more of that, right? You know, I think that, those are the things that help organizations grow. And again, I'll say it because it's one of my favorite things to say is you got to Inspect what you expect and you can't in having everything under one roof to be able to roll that stuff up and look at it that's powerful.

BOB

32:44 Other questions you have?

BOB

32:47 No, no, no, I didn't just background share.

BOB

32:55 Yes, that sounds good. I think we got good next steps for us.

PATRICK

33:00 Yeah, I'm gonna today. I got a buggy to a few other things and then, my cycle or my motion daily is generally by the end of the day, I got about a half hour.

--- Next Steps ---

PATRICK

33:10 I kind of push out my recap, emails, loop folks in. So you will get it. You will either have an email from me into the team later this afternoon or for by the time you all get to work because I'll be at it long before you all tomorrow morning, but you will be looped in either this afternoon or by the morning with the rest of the team and so that you all can start that discovery process with Alex and Pan?

--- Next Steps ends ---

BOB

33:32 Sounds good.

PATRICK

33:33 Awesome on the contract front. Bob, would you be the person that if I were to put together, a three year proposal to send to you to review or you the guy?

BOB

33:45 Yeah. Send that to me.

PATRICK

33:46 What I'd like to do just so you're aware before I push this out is I'd love to be able to go ahead. You said sales seven sales users. What I wanna do is put together a proposal that accounts for nine over the course of the three years to give you a little bit of room to grow into this. And then I'll send you the proposal with the three year

deal with the 10 year yo. I, you can ask the question I'm gonna, or the proposal I'm gonna send you is not like an official contract. It's a copy of the contract with everything it's gonna be just like the official contract except we just don't push it out through Adobe. So review that. Let me know if you have any questions.

--- Wrap-up ---

PATRICK

34:22 We can hop back on a call if you want. And then if we feel like we're in a good spot, you let me know and I can push out, the official contract so you can sign that one.

BOB

34:31 Sounds good. Yeah, let's put that together and send it over so we can look at it and review it.

PATRICK

34:37 Perfect. I'll have the notes in there. You'll it'll be coming from my email address. And then hopefully once we're flat on that, then I can give you, the real one and we can keep this partnership going.

BOB

34:47 Sounds good, Patrick. I appreciate you reaching out to us so.

PATRICK

34:51 Yeah, yeah, man.

--- Small Talk ---

PATRICK

34:54 Like I said, my email is always open. I am on the east coast. I'm actually in our headquarters in North Carolina. I travel a ton for work though because, I service our most strategic clients are our largest most valuable clients of which you all are now one. So let me when I am next out in Phoenix, I've already been out in Phoenix once this year. Next time I come out there, I'm gonna try and make a stop through to say hello bring so.

--- Small Talk ends ---

BOB

35:21 Good.

PATRICK

35:21 I appreciate your time, you, we'll be in touch and we'll talk soon.

BOB

35:25 Thanks, Patrick.

PATRICK

35:26 All right. Thanks.

The End