



ServiceTrade/Sockeye- ACIS

Tanya Eney with Sockeye Consulting
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Participants

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Transcript

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

MATT

0:00 Hey, there.

TANYA

0:02 How are you?

MATT

0:04 I'm good. How about yourself?

TANYA

0:07 Hi, I'm doing like, I'm like running around doing too much stuff, but, you know, man, how was your, did you go to saint Louis or Kansas City on Friday?

MATT

0:17 Kansas City... I'm pretty well wasn't like my usual. Well, it started out like Mutual travel because I booked up. I booked a flight as soon as I knew I needed to be out there, and that flight got delayed so many times that it was no longer and eligible flight. So I had to go to a different airline. So, when would southwest? And then that flight also got delayed. So I had to switch the flight up again. Like I had to go to the desk. So I didn't get in until like, I didn't get to my hotel to like one 30 in the morning.

TANYA

0:51 My God.

MATT

0:52 And then, so I got that around like two o'clock in the morning. And then I feel like I had to be up for like six or seven. So I was running off like four or five hours.

TANYA

1:02 That sucks. And then hotel sleeps always bad live with my family. We went to New York City over the weekend and we flew out Friday morning in the airport was absolutely crazy, you know, the area where you go through all the ropes and the main terminal before even got there. There was four one, four sneaking winds that went from one end to the terminal to the other back and forth four times before you can even get into that area.

MATT

1:30 Wow, that was our.

TANYA

1:32 Yeah, I've never. I didn't see it like that. I don't know if ever, you know, it wasn't saying. So, let me, let him in. This is, so he's the one working with a cis from soccer.

TANYA

1:55 Hi, Michael. I'm Tanya.

MICHAEL

1:59 Matthew, how are you?

MATT

2:01 Hi. I'm well, how are you?

MICHAEL

2:03 Good. I'm doing well. I'm sorry, I was a bit late there.

TANYA

2:06 That's okay. Nice to meet you.

MICHAEL

2:09 Nice to meet you as well. It's great to meet you. How's your guys weekend?

TANYA

2:13 Good, good. How was yours?

MICHAEL

2:17 It was, it was good. Quick. I felt.

TANYA

2:20 I know it feels great. Especially if it gets to be summer. It seems like it even goes faster. Yeah.

MICHAEL

2:26 No, I can, I feel like I don't even remember what? I did it by so quick.

TANYA

2:31 It's usually have my weekends ago. They had one, but I don't know what I did.

MATT

2:38 I did my first escape room this weekend. I've never done one of those before.

TANYA

2:43 How was it? Did you? I will clearly escape.

MATT

2:46 Yeah, it was stressful. It was well done like it was fun, but it felt like a really long like a homework assignment like an algebra problem or whatever. And I went with people that I don't really know that well. It's kinda found a place and it's like not conducive for getting to know people because everybody's kind of scattered. So you don't even you still don't know anything about them, but it was a blast. It was actually a lot of fun. So, recommended.

TANYA

3:14 I did one for my son's like twelfth birthday. We did it and I was in the room is more like the shop around and it was all his friends and it was pretty cool. Like I could envision how they would do it but it was really neat. The way that you have to solve will include to go to the next thing to go to the next thing. So.

MATT

3:30 Yeah, I...

MICHAEL

3:32 Was just gotten popular. I haven't done one either. I feel like there's a bunch around here and it's like a, it's a fun activity do with people kind of check it out.

MATT

3:41 Mix things up if you're sick of bowling or mini golf, you know, like go trying to escape room, see what happens.

MICHAEL

3:48 Yeah.

TANYA

3:50 Yeah. Where are you based out of Michael?

MICHAEL

3:52 So, I am just outside of Chicago. Okay. Yeah, suburb called Naperville.

TANYA

3:58 Okay.

MICHAEL

3:58 Yeah. How about you?

TANYA

4:01 We're both in Raleigh, North Carolina.

MICHAEL

4:04 I tell you what? That sounds quite a bit better.

TANYA

4:08 I know it's been pretty warm here lately, so.

MICHAEL

4:12 Does it gets super hot and the Summers in Raleigh?

TANYA

4:14 It does, it does. Yeah, we, we've actually last week or the week before last that we were like and then, and he was middle upper nineties. So, yeah, they went back down to more seasonable, but we got up there, so.

MICHAEL

4:29 Hey, I guess better husband called, I'll tell you that, yeah.

MATT

4:32 I'm coming from, I've been arrive or two and a half years, but I was in northern Vermont before that. So I'm no stranger, long, bitter cold when.

MICHAEL

4:44 Certainly, no stranger. That's probably even tougher and Chicago.

MATT

4:47 Yeah. Yeah. The upgrade.

MICHAEL

4:51 Yeah.

TANYA

4:52 Well, thanks for hopping on with us. So we are, how they were both talking about the same folks. I know, I'm Jeff and I have known each other for a long time. I saw Sage, the Sage products through a partner called alliance solutions group. I'm down in Florida. And so I, so 103 100 and I sold in tact with that. I can have a service trade a little over a year ago. So that Jeff and Eric, we're both that HR back in February

and came in general as a service trade. And actually one of our customers ended up hooking them up and getting them hockey tickets to see the loss vegas hockey team and stuff. So.

MICHAEL

5:32 Yeah.

TANYA

5:32 It's pretty cool because like, yeah, we got a bunch of corporate tickets and you guys want to go. Let me, it just seems like it so worked out well for them. Yeah. So Jeff and I have, we know we've had a couple of times over some different Mutual deals. And then we were talking with cis and they were saying they were looking at and tags and they brought up Sockeye and I was like, well, we know Sockeye so, but sounds like it did sound like they were leaning if not if they move forward with Intacct or they're about to.

MICHAEL

6:00 So it's a really interesting deal. So... I don't even know where to start with the, I mean, there's so much going on. So they are evaluating and tax heavily. However, it's weird. We haven't even had like a discovery call or a demo with our finance team because the controller previously used into.

TANYA

6:22 One of those. Okay?

MICHAEL

6:23 You have a call scheduled on the books with them for it's not even scheduled that actually had a call with them with Todd right before this button hour ago. So it's going to be on the seventeenth. It's gonna be kind of like a discussion slash demo there. The controller is that familiar with the product? I, I've been trying to just meet the guy and get a discovery the books for the longest time just so we can know what to show them that they want to have more of just a discussion and talent type thing which is great. They're making a decision for sure. He just told me the last week of June for their operations as well as, you know, if they're gonna either stick with this stuff or do intact but it sounds like if they stick with vista, they're gonna put in tact on top of it for the higher level reporting which...

TANYA

7:14 That's what I heard too, which, you know, today, I don't know what your take was a good conversation. He's very stuck on this all in one concept and I was trying to talk to him about like, yes, but that's how things were done in the nineties and so vista in stage 300, they had to do that. So there's no way not, you couldn't like communicate unless you were one system that's all changed you, Tony on all in one blah blah blah, and you need best of breed and your Construction is going to do things differently than your service department. And, you know, it could be that you buy intact and you buy pro core and you buy service trade.

MICHAEL

7:50 Right, absolutely. And so kind of on that note. So we have that discussion we were talking, you know, because he needs a payroll and HR solution as well. In tact, has a new payroll solution. We don't have HR though. So I didn't really even recommended much. I kinda just run it by him because he wants one one software for that.

--- *Type of work* ---

MICHAEL

8:10 And then I was asking him about service tighten and, you know, whatever else he was evaluating as well as service trade and because they were stuck on at the beginning of the evaluation, going with service tighten, despite the fact that it's not for the commercial side of things at all.

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

TANYA

8:26 Would, you know, probably went either because it seems like when service tighten gets involved bigger chili slash app to comes in, I was like mine.

MICHAEL

8:33 Right. And we have a partnership with them now, so.

TANYA

8:37 Yeah, but.

MICHAEL

8:39 It's not the right fit at all and they, so.

TANYA

8:42 I agree.

MICHAEL

8:42 This is the good news with that. Is on the call, their, one of their subsidiaries that they bought had licenses to service tighten. And so he was kind of using it as kind of like a, how did you call it? Like a playpen? Like he was just messing around and seeing how it works? And he said that they poked a ton of holes in it. So it doesn't sound like they're going to go that route. And then they also discovered that... ServiceTitan is now kind of trying to get on the commercial side of things because they're going to go public soon and it would add like 8,000,000,000 dollars onto there, you know, what, who, whoever, you know would be evaluating them. That's why they're trying to really, you know, kind of get into that market share and they're positioning it, ServiceTitan that is positioning it as, you know, you'd be the first month on it, you would be able to drive the product. You would be, you know, that'll show for a while for a while.

MICHAEL

9:38 Acs was really bought in because I mean they were missing them in person. I think they've visited twice but now it sounds like they've kind of moved off of that. And so I ask them about service trade. And his one concern was, I mean, you already know what it is that it would be pro core and service trade it sounds like.

--- Accounting integrations ends ---

MICHAEL

9:59 And he wants one thing for the operation side. With that being said, who knows? I mean he also said he's going in person out to somewhere in DC to visit a custom made, you know, software provider. Meanwhile he wants to make a decision at the end of June.

--- Purchase decision ---

TANYA

10:19 Yeah, he's kinda all over the place.

MICHAEL

10:20 It's it's really tough to tell. I think we, from the, in text side, we'll have a much better feel like I wanna say, I'm confident in this, but I think because he is, he's literally said to me when he was on our call like congratulations, our controller previously used, you were going to go with you guys. But now I'm hearing this, it might like light on top of this done, right? Like how does it?

--- Purchase decision ends ---

TANYA

10:44 Do that, you know why? So.

MICHAEL

10:47 There's there's a lot to kind of like discover here still if you will have a much better deal on our end on the seventeenth. And I did want to just connect with you on, you know, what I heard from him with the pro core and service trade side, but you already, I mean, you already said that to me, so it sounds like you already kind of, you know, kind of a gut feeling about that.

--- Type of work ---

TANYA

11:08 Yeah... yeah. I mean, we bought a lot of customers that do both. Can, you know, they're do Construction and they do service and you know, very much so that they,

there's a service division. So the service people use the service tools that are best for them. And the Construction people use the Construction tools are best for them.

--- Type of work ends ---

TANYA

11:26 But he's like they do everything, you know, now, you know, they balance between all the stuff and I don't know like if that's like if I do 50 50 every day or is it like I do, if I balances, I bounced like five percent or, you know, that?

MICHAEL

11:43 Right.

MATT

11:44 Well, what's also particularly difficult is talking about an all in one, but it's not in the traditional sense that we often run into where they're looking for accounting CRM.

MICHAEL

11:55 Netsuite.

MATT

11:57 You know, yeah, they, they're not who's not actually looking for that and they already have some amazing ingredients for a really good ecosystem.

--- Accounting integrations ---

MATT

12:06 So they're using Salesforce, they want to move to Sage intacct, they're using a zoo go, which is a fleet tracking system that we are integrated. Wouldn't have a partnership with using extra. Why would they could probably get rid of just because service, if they use service trade? But then if they took on something like a pro core, they would be like a poster child for the best of breed platform. So when he says all in one, he's primarily referring to something for both Construction and service. And right now they're using field connect which gives the illusion that they're able to do that. But really field connect isn't designed for any particular industry. It's just tying into visitors underwhelming service module and project module, whatever the official term is, for which both of those do a whole lot, but it offers some seamless flexibility for the Construction techs swapping back and forth between the service side. So, and I Tanya, I just spoke with Dan or Riza who is roughly familiar with this account. And so he was kinda talking about how it doesn't do a whole lot but they do have the ability to go back and forth. And he said that they've had to do a lot of bandwidth workarounds within the visitors service module in order to get it to do what they want.

--- Accounting integrations ends ---

MATT

13:26 So, there's some, been some business practice changes to fit it to the software. But a lot of our customers do have Construction and service siloed because they're different beast. So it tends to be a much easier conversation to say, hey, have your Construction techs operating out of pro core or Aesop or whatever. And then have your service techs operating out of service trade. That ends up being pretty good. So challenge for us here is planning that seed and encouraging that transition, getting them open to, hey, how often are your Construction techs actually going over and doing service? Like do they need full blown access and vice versa?

MICHAEL

14:13 It's...

MATT

14:14 Already a little more siloed than you think... you know. So what could that look like if you guys weren't in field connect?

MICHAEL

14:24 Right, right. And it's a really tough it can be with him a bit, a really tough conversation just because of how much he has bouncing around.

--- Purchase decision ---

MICHAEL

14:37 I feel like he's evaluated everything and sometimes that makes sometimes that makes it harder on the prospect, right? Is when you open up your eyes to everything, and instead of, you know, I don't know it's kind of a tough conversation of, you know what I mean?

TANYA

14:55 Yeah. Yeah. So he was in the hierarchy decision making, is Todd like the end for you to or no?

--- Purchase decision ends ---

MICHAEL

15:05 So for me, it's going to be, it sounds like the controller and CFO but Todd is in control of the entire evaluation like asked a couple of times now to get conversation setup with them and he didn't want to until he found which the service tool isn't the main priority.

--- Accounting integrations ---

TANYA

15:24 No.

MICHAEL

15:25 You didn't want us to meet with them until they found the service tool. And if the service tool wasn't gonna directly integrate with Intacct, he's was saying like, you know, I don't there's no point in meeting which I get, which I get. The operations and services are the main thing for them.

--- Purchase decision ---

MICHAEL

15:42 There's no doubt. There's no doubt about it. So, and I think they're realizing that in tax kind of integrates with everything that they're looking at it up until this point. So that's why we finally got the scheduled out. And he also, I think he has pressure on him from the higher ups to make the decision at the end of June. So.

TANYA

16:03 That seems so fast. I mean, good for us but it seems almost on realistic to get really through an evaluation process.

MICHAEL

16:12 I agree. Completely agree. I do know they're checking out BuildOps as well... which is another one that he mentioned to me actually today. So I, I'm trying to remember who the company out of DC was. It was some small company and I...

--- Purchase decision ends ---

TANYA

16:30 Yeah, it was like it was... some, somebody that's another service company that wrote their own in house software that.

MATT

16:41 I think it was Oklahoma City Oklahoma.

MICHAEL

16:44 Yeah. There was one in Oklahoma City too as well.

TANYA

16:47 No, there's no, gosh, there's so this is the fifth one fifth thing.

MATT

16:52 Yeah, it's a partner company in the synergy girl that's kinda like, yeah, it's kind of like a user's group where I guess synergy endorses certain solutions and they, you know, they share feedback and best practices and stuff like that. So... it's funny. I mean, we talked about our team like, you know, they're probably going to stumble upon BuildOps, which are you guys affiliated with BuildOps or have a partnership with them?

MICHAEL

17:22 So they do integrate within tack... but they're done the other end other side of things. They also do integrate with vista. So there's kind of there's kind of that whole thing when we, so when we talk to them the first time you guys may have spoke with them for us, I don't know, but Nick, our CEO is on the call.

--- Accounting integrations ends ---

MICHAEL

17:47 He... recommended you recommended pro core, you recommended build apps as well. But I don't know maybe you guys got in touch with them first, but I do know that's probably why they're checking out BuildOps at this point because they're newer. I don't know that they would have known much about BuildOps.

TANYA

18:08 Yeah, it.

MICHAEL

18:09 Was doing some research on them. I think their CEO actually came over from service tighten... one of their higher ups, maybe as, or CFO or something like that. So, yeah, but just so you get to share and all the information that I know.

MATT

18:25 No, that's no, and I know that was a concern expressed on our team because BuildOps is newer. We don't really know much about their ability to deliver on their promises because they've got some pretty big promises to backup in terms of being in business for like I think three years now and...

MICHAEL

18:48 Hey, Dan, yeah, I just saw that as well. Huh.

MATT

18:51 So, I mean, Construction and commercial service and I think they do more than that. I forget the details of it, but we just don't know a lot of our successful implementations. We've had customers come from botched implementations over to service trade. But other than that, we don't really know. We just know that they sell very well. You know, they can, they do it well enough to give a proof of concept, but we just know how distracting and appealing that will look to a company like aces who is looking for the all in one Construction service module.

MICHAEL

19:31 Right, right. They're growing. I mean, they're doing a lot of acquiring. It sounds like of other businesses too. So... certainly would want something established.

TANYA

19:44 Yeah. Yeah, yeah, no, they're big. Well, cool. Well, I think it's helpful, you know, just to share, you guys are meeting on the seventeenth there. What, where do you, what territory you cover? Our? I most surprised when Sockeye shows up in something because I always think of them. You know, Jeff, I've always known as being up in the north west but it sounds like you guys cover a lot wider areas.

MICHAEL

20:07 Yeah. So I'm kind have California, Colorado kind have everywhere to be asked you if we, you know, we register companies that kind of fit in, you know, what we specialize in which is Construction. Okay? And now I'm kind of the first one out here. We have one person in Florida, but other than that, everyone's out. You know, we've got a bunch of people in Alaska, people in Washington. No, I'm in California. So I, lot of my customers are more out west.

--- *Type of work* ---

MICHAEL

20:35 I do have some in Texas that I brought on but I know we're pretty small sales team. So I don't really have a territory per SE.

TANYA

20:47 What do you, so, I know you guys work with Construction. Do you specialize in? Anything in particular? In Construction are just any flavor of Construction?

MICHAEL

20:55 Really any flavor and services? I mean, it'll be great to work with you guys more. I think it's great that we're on a call together. I run it. I come across a lot of services. A lot of, I get bunch of warm leads to be honest with you people that come on site guys website specifically.

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

MICHAEL

21:10 And then, you know, we register them with Sage. Yeah, a lot of them recently have been a lot... of service companies and I'm actually newer to sack. I came on back in February over from. Okay. And so, you know, I, like I said, I come across a lot of service companies that and I don't really have like a go to partner if you will. Who would be, you know, great detecting once so.

--- *Purchase decision* ---

TANYA

21:39 Well, if you want, I know we've got a little bit of time here today, but I'm happy to hop on and give you kind of a demo more just an overview of understanding how we work and kind of our profile and pricing structure to. So as you're coming across

those deals, you know, because we're the same way we come across staff and, you know, pull in Jaffer, different partners into deals as we've got stuff that pops up.

MICHAEL

22:02 Yeah, that would be fantastic. I think that would be really beneficial just because there really are enough to the point where it would not. I don't think it would be a waste of, you know, anybody's time to do so. So, I think that would be fantastic.

TANYA

22:16 Yeah, because, I mean, I know we do pay referrals, but I know most time you guys are focused on getting the accounting deal and we want to, you know, sign is working out together like they need a full solution. They don't let you know. And so you gotta going with both things to replace what they're coming off of a lot of time so we can help on the service side. You guys take the accounting side. And then so, well, cool. Well, I don't know if you want to set something up what your calendar looks like, but I can take you through and like 30 minutes just kinda some that's why I have a slide deck I put together that just explains what service traded and some of the benefits and, you know, where we shine a, there's definitely areas that we're not a great fit for like residential.

--- Type of work ---

TANYA

22:58 You know, we usually push those because this is our structure and stuff like that. And that's why like he says, didn't find service tighten appealing because we've you know, because of the structure of service tighten, which deals with the residential, where we are more focused on commercial for all, focused on commercial. I should say.

--- Type of work ends ---

MICHAEL

23:15 Right, right. Absolutely. That would be great to check it out. We have our partner conference actually all of this week.

TANYA

23:22 That's right? I was just talking with either as he said that he was heading to that, that's right? I forgot about that. So maybe next week or something?

MICHAEL

23:28 Next Wednesday, I pretty much have availability all day if you do.

TANYA

23:32 Yeah. Let me look at my calendar real quick. The fifteenth.

MICHAEL

23:36 Or whenever you're whenever is best for you?

TANYA

23:39 Fifteenth works. I'm pretty much open. What would you prefer?

MICHAEL

23:45 We'll put 11 am or I guess.

TANYA

23:47 Yeah.

MICHAEL

23:47 Well...

TANYA

23:49 Extra me.

MICHAEL

23:51 Great.

TANYA

23:52 I'll send you a meeting invite and we'll hop on and take you through and get any questions answer.

MICHAEL

24:01 Awesome. That sounds good. And I'm if I find anything else out from Todd, yeah, he's an open book. I guess this might be more of what prospects are thinking but they just typically don't tell probably wasn't much.

--- Purchase decision ---

MICHAEL

24:17 I'd really is. I mean, he just goes and goes. If you ask them one question, I mean, he will tell you it's gone through his mind. Sorry, go.

MATT

24:27 I've pulled up on that too. He's very friendly and respectful, but, yeah, great forward and to go, I'll look at it like absolutely. But I can tell you right now this is going to be the deal breaker, so.

--- Purchase decision ends ---

MICHAEL

24:39 Yeah, very straightforward. Yeah... there we open, but, well, great. It was great, I think, yeah.

TANYA

24:48 Nice to meet you Michael.

MICHAEL

24:49 Absolutely. We'll take care. Have a good rest of your day.

TANYA

24:52 All right.

MATT

24:53 You...

TANYA

24:53 Too. Bye.

The End