



Call with Accordant Company LLC - Henry Lubas

Aaron Ward with Accordant Company, LLC
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Participants

SERVICETRADE

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ACCORDANT COMPANY, LLC

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Topics

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Transcript

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

AARON

0:04 Hello?

HENRY

0:05 Hello? Aaron.

AARON

0:06 Hey, what's up, Henry?

HENRY

0:07 Hey, Henry. How you doing? Figure? I'm sitting here, who knows what the rest of the day we'll bring? So I forgot reach out for you right away.

AARON

0:15 Yeah, thanks. I appreciate it. Yeah. I wanted to hear kind of what are your thoughts on him where?

--- Pricing ---

AARON

0:19 But particular like what in the email you said, Sage intacct is probably not the best option for him. Why is that exactly?

HENRY

0:16 Yeah.

HENRY

0:27 Primarily price?

HENRY

0:31 Yeah, he's a small companies got six tech, six to eight tax rates for four or five people in the accounting department. I'm in your in text deal is going to be probably 25 30 grand. Did an annual license implementation is probably 50 grand, and then ongoing service, just 12 or 15 grand a year. So, your first year cost is almost 100 grand. And that doesn't include service trade, right? So I can't imagine a company

that size, you know, a viewer being that in addition, you know, just, you know, their product.

AARON

0:56 Right.

HENRY

1:09 They're very nice people. I'm assuming husband or wife. I don't know both of them. One of your calls are not.

AARON

1:14 Yeah.

HENRY

1:15 But, you know, little older. It'll be polite. So, I, you know, and the questions are asking like just very old school, right? I want to report that. Does, yes, I said no one, it's like you don't have it there's. No report. This is a dashboard and they just couldn't get their head around like the different surgery. She couldn't he, could, he or she kept asking me is really detailed question about accounts payable. How do you do this? How do you do that? How do, and like none of it's none of it's relevant in my opinion, right? To what really is gonna make a difference? But that's hard world and she doesn't want her world to change in tax, a huge change. So I just don't think irrespective of cost, you know, that's going to be important. You know, they like what they have. Now, it just doesn't have mobile, right? In order to get mobile, they have to get to, they have to first upgrade mass 90, the saved 100 ERP which is Bill an on premise solution. And then, you know, they have a service tool, you know, tied into mass 90. But, you know, who knows if that tool can migrate or has migrated, you know, to, because, you know, back in the last 90 days, you'd have people, you know, resellers would build the apps around the platform and then sell it as a vertical, right? Any of the us but not have that as their main focus. And that's the product, you know, the core ERP evolves. They don't keep up with it, right? So, I don't even know if the product they have can migrate and, or has a mobile app, right? So, the same thing, no, so, you know, it's a, where they are now is not the right place. There's really no clear easy path for them. And so, I think they gotta start over, you know, and everything they asked for, you know, Sage, 100 contractor although it's still an on premise solution will do. And I always think it's a better fit for him based on the, you know, she was ever these very specific reports. While I got them in spades and saved 100 and intact is dashboards and just different, right? So, and they're only a couple of users and very simple requirements they want in house payroll, you know, with your needs with Sage 100, does we're in text? Not there yet?

AARON

1:47 Right, right.

HENRY

3:45 And you do have, there is an integration with service trade by the way, you know, to save 100 contractor. So... I forget because, you know, Tania, any knows who built

it. I think it's Robert virgo, Robert Burger at the UI dynamics, I think is the current guy, right?

AARON

4:00 Yeah.

AARON

4:07 Maybe, I think it's we call those like partner integrations.

HENRY

4:07 If I'm not.

HENRY

4:13 Right, right.

AARON

4:15 So, yeah, it's gonna be an additional costs on top of service trade. I really don't know how much it would be, it might be, that might be outside his budget as well because... you know, it's those are usually kind of expensive.

--- Pricing ends ---

AARON

4:29 So that's I like that if you had gotten an Intacct or Quickbooks, you wouldn't have had to pay anything for us integration. But any of those partner integrations. These are all extra. It's a lot. It's a lot of them are pretty expensive.

--- Pricing ---

HENRY

4:18 Yeah.

HENRY

4:25 Right. Yeah.

--- Pricing ends ---

HENRY

4:37 Right, right. Yep.

HENRY

4:43 Right. And then on top of that, I think that's in my email, I said they are.

HENRY

4:51 Looking there, there's this guy, Courtney Stern. She mentioned court you stern's right? And I knew the name right here. Definitely ring a bell and.

HENRY

5:02 She used to work for Sage home back five, six, seven years ago and coordinate is sort of like his business advisor, right? If you look at, you know, his LinkedIn profile, he's one of these guys that goes into mechanical firms and works on business process and workflow and et cetera. And he's you know, he's recommending sages mobile platform. Let's say field service and, you know, I, it's okay, not nearly as user. I should say it's not nearly as technicians friendly as service trade. This, that's why I like service triggers so visual so easy to use, understand, you know, the Sage field operations cryptic, right? So, can you check a box that says you have mobile service with service operations? Sure? Is it ideal? No, that's I still like service trade especially with people with tracking equipment and all that other stuff. So.

AARON

5:27 Right.

AARON

6:00 Yeah.

AARON

6:08 Yeah. Well, I don't know. It sounds like, I mean, you, you've experienced them now. I mean, I try to convey some of that over, you know, when I talked to you last, it's just like talking to her all, talking to either of them. They're nice, but they're extremely detailed, focused on details that seemingly don't really matter for the business objectives, but they get stuck on these tangents. And I've had multiple. I can't even tell you how many our long conversations I've had with them over small things that.

HENRY

6:16 Right, right.

HENRY

6:28 Right.

HENRY

6:31 Right. Yeah, yeah, no.

HENRY

6:43 My, you know, my demos or for Sage intacct is usually 45 minutes. No, I fill up the last 15 minutes on implementation conversations. I was off for two hours was, I went to ours, so we never got to the implementation conversation. I have a checklist of things, you know, that I never like, I never get to that level of detail. Like can you

add a purchase? Can, you know, can you add an item to a purchase order after it's been partially received? Well? The answer, an intact is notes. So like my question is, what's the business case that needs that?

AARON

6:54 Sure.

AARON

6:57 Yeah.

AARON

7:07 Yeah.

AARON

7:19 What did they, what did they say to that?

HENRY

7:23 Well, they didn't have an answer? Or they just know that's the way the system works today, right? Like, why is that important? Right? And show me how you would pay an ap Bill with a credit card? And I, usually, when someone asked that question, I go to the intact menu and I showed, you know, pay Bill by credit card and that's all I gotta do, right? And they were like, well, that, how do I reconcile it? Like they want me to take them through that? Like, who cares?

AARON

7:28 Right.

AARON

7:50 Yeah. They want it's like they want to course, but then they don't want to buy it like they want you to teach them how to use it.

HENRY

7:56 Yeah. Well, I think... they want a system that replaces their existing system just with mobile is what they want. And the closest I have to that is going to be Sage 100 contractor. Now, the only thing I've saved 100 have to won't do. And again, this is just a requirement they have to get over. And maybe, you know, maybe if they get over this one requirement, Quickbooks will work, right? I don't think it will because of union, you know, there's three reasons that saved 100 contractor will be better like, hey, are you billing and you mean payrolls and reporting and whatever. But if you can get them off the need to do like here's, another thing they want to, they wanted to receive, you know, have a purchase order for the same item that either goes into their inventory or...

AARON

8:03 Right.

HENRY

8:55 Goes to a job or work order like, well, why do you need that? Like what's the business case that says that's required? Well, the guy I'll go and buy it doesn't and still use 10 and we need to put two and inventory. Well, okay. That's I can hear you. Do you just receive 12 to the job and then do it, you know, inventory transaction after the fact for two? No, we'd want to do it that way. Okay?

AARON

9:09 Yeah.

HENRY

9:25 And I don't think in tax, does that saved? Well, how do I could do that, right? So I could do that would save 100? What I can't do, I shouldn't say that I can't do easily is have one purchase order, go to multiple jobs, right? And I think that was the limitation with Quickbooks. So with Quickbooks, okay. So my question is, well, why do you need that? You know, the concept here is I'm a technician out on a work on a job on a service call. I'm going to buy material for that job, right? So issue a purchase order for that job for the tickets, right? Well, sometimes they go, two or three tickets will then do two or three purchase orders. Why is that a problem? You know, I don't understand why that is such an obstacle. Quickbooks can't do it. Five Quickbooks can't do that by the way, you know... Sage intacct almost can, but, you know, the question I have, I'm having a, she wants to track inventory, I trucks, doc. I said, well, how are you going to do that? You know, yeah, I can do that inside of Sage intacct, but you want that to be, you know, part of your work quarter process, you know? So now we start, we are not any parts ledger. I think as far as I mean, I'm guessing from your side...

AARON

10:16 It's...

AARON

10:49 Yeah. Yeah. It will parts ledger will do that. You'll be able to measure.

AARON

10:56 Inventory and track it's. A truck level. Yep. So.

HENRY

10:59 Right.

HENRY

11:01 Right. And take it off, take it off the truck and put her on a job and vice versa, right? I mean, I think part central July, but doesn't add another layer of cost for you guys.

AARON

11:10 Right. And then the other thing is my understanding was they really wanted to track this stuff in the accounting system specifically.

--- Pricing ---

AARON

11:18 So, I didn't yeah, I don't know that's why I haven't shown the parts ledger yet, because it's an added cost that they already want to replace mass 90. And they told me they didn't want to go to stage 100 for whatever, just the upgrade. They didn't want to do that.

HENRY

11:17 Yeah. Exactly. So, how do you do that?

HENRY

11:24 Yeah.

HENRY

11:29 Right. Yeah.

HENRY

11:34 Well, you gotta be careful there's, Sage, 100 ERP, is what they don't want to go to. So I'm suggesting they go to Sage, 100 contractor. So, do you gotta be careful with say, just terminology, right? So.

AARON

11:39 Yeah, why is that?

AARON

11:45 Right.

AARON

11:50 Right.

HENRY

11:53 I think they don't want to go to 100 ERP because their service tool doesn't migrating. They'd have to do a second service tool, new service tool anyway. And then, you know, there's still some challenges. So, I don't know... it's I don't think there's a solution for him out there that's gonna do exactly what they want, right?

AARON

12:15 Yeah.

HENRY

12:21 I'm gonna push back and say, you know, no, you really need to be in Sage 100 contractor, and then, you know, to be perfectly honest, saved service operations will be easier seamless. The only five people, right? Or six people. Yeah. Yeah, I mean, I love service trade and I push it hard, but from a workflow and what they're trying to do, it just may not fit, you know, by the way they're looking at BuildOps to, and if you saw my note, I have no idea what there, but again, that product, this was as far as I understand, it's pretty expensive.

AARON

12:38 Six. Yeah.

AARON

12:53 Yeah.

AARON

13:01 Yeah, it's I don't know how much more it is the most, but I know it's whatever quote he got... it was a lot more so in.

HENRY

13:10 Yeah. And then they charge for integration to back to Intacct. So, you know, and the integration... is pretty robust as far as I have seen, but I know there's a pretty good cost to it. So, I don't know, I have a couple of takeaways, some very specific functional things that they want to see an Intacct. I mean, I'm gonna answer those questions and then I'm going to give them a quote, but I guarantee you once they see the quote, it's just never going to happen and, you know.

AARON

13:14 Yeah.

AARON

13:44 Well, what about see the Sage 100? Sorry, are you gonna give them a quote for that as well?

HENRY

13:51 Yeah. Well, I will see if they're open to looking at Sage 100 contractor and, you know, I can give them rough budget numbers, you know, on the fly. I mean, the Sage 100 contract or five users that's like six six grand a year, right? Six six, eight grand a year, which is all they're gonna, you know, which is it all in there? Martin limitation to that is 10 or 12 grand, right? There's no maintenance fee. So it's a Chester, drastically different price points are, that are hosting if they want to have hosted, yeah, hosting minded three or four grand a year, right? So, you know, you're talking all in 25, 30 grand a year, one for 100, you know, in taxes, almost six figures, right? Because it's going to be 30, you know, 30, you know, 25 to 30 on the subscription. And then it's gonna be, you know, 45 to 50 grand on training. And then our managed services plan is going to be 15 grand a year. So you're pushing six figures, I can't see them doing that, you know?

AARON

14:59 Yeah. I really had no idea how much was so.

HENRY

15:03 Yeah. Yeah.

AARON

15:04 In Sage, so, you see, are you say it's like six to eight grand a year?

HENRY

15:08 Yeah. So say it's called several 100 contractor. So in our world say 200 contractors are entry level application. Then we get into what's called timberline, which is called that's called Sage, 300 CRV, right? So, because it has a real estate component, save 100 doesn't have real estate. So they call a contractor, right? But.

AARON

15:11 Yeah.

AARON

15:18 300 it.

HENRY

15:29 You know, and I wouldn't even go 300 because that's probably double of what 100 is going to be. Okay. So, you know, all in it's probably that, you know, it's probably 15 to 20 on the subscription. You're implementation is probably 30 30 to 35. And then, you know, you're on you're hosting there's another, you know, five or six. I mean, you're 75 80, all day long, first year cost would Sage 300, and they don't need it right now. They will need it. If that one thing they want a purchase order to multiple with multiple, the 300, it'll do it, right?

HENRY

16:10 Which is like, I don't think that's a good enough reason to go to that platform, but... we'll see.

AARON

16:16 Yeah. So, I just want to clarify, I'm actually looking at a like a flow chart right now of the different accounting systems out there. I just want to clarify the Sage 300 it, Sage 300, sorry, those are different in 300. Gre, is timberline.

HENRY

16:22 Right.

HENRY

16:30 Yeah.

HENRY

16:33 Is, is timberline that's correct? Yeah.

AARON

16:35 Sage 300 by itself doesn't have a name. It's SH, 300?

HENRY

16:40 I think it's called Sage 300 ERP. I think that used to be what was cold mccolo back in the day.

HENRY

16:47 So, Sage portal these products and then branded them so that there was, you know... some commonality.

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HENRY

16:58 But I think all they did was confuse everybody including myself at times, right? I might have people, I've had people call me up and scream at me because they bought without talking to me. They, you know, they bought a payroll system that the payroll company insisted they integrate with Sage 100, which they do. It's just the wrong Sage 100.

AARON

17:01 Yeah.

HENRY

17:23 Yeah. So, yeah, yeah, paychecks talks to save 100 ERP, you have saved 100 contractor, which are two different platforms. So, I, you know, it's just confusing as hell. So.

AARON

17:36 Yeah.

AARON

17:38 Well, I'm glad I got to clarify that because I've always been confused by that. So.

HENRY

17:42 Yeah. So here's what I'm gonna do with these people, I'm gonna get my questions answered. I think my review of what they want intact will not, do... I have for specific functionality questions in some reports they want and, you know, have

the four or five things they want. Two or three are not going to be done the way they want it.

HENRY

18:10 And I don't know if that alone is a showstopper but... price I think will be the ultimate show stuff. I'm just going to go right out there. And so it looks just in here that, you know, should we even continue these conversations, right? And I think the answer is no, I just don't think they're gonna, yeah. And then, yeah, I think I'll circle back with Sage, 100 contractor. Like I said, if the one it'll check every other box except for that one thing would purchase orders. But like really like you gotta get off to, you know, get over that maybe in your price point will be here. You know, you have options for mobile, right? Whether it's service trade or Sage service operations. And by the way this guy court easterns posted, I didn't even mentioned it. I just want you to be clear when you give me a lead, you know, I'm respecting... your, you know, involvement and I was... very much, you know, pushing service trade there because there are a lot of reasons, right? And wasn't till this wasn't totally say quarterly Stern said, you gotta look at it right now, coming in to do that and coordinate stern's just got a good long-term relationship with Bob. Sandal, is our managing partner. So, you know, I might be obligated to do that. I don't know. But again, I'll positions service trade as the right solution either way for like no, for a lot of good. I'm I honestly believe that. I mean, that's I'm a big proponent. I'm good friends with Tonya any for 20 years now.

--- Pricing ---

HENRY

19:52 So when she went over there, I was pretty excited and I push it all the time. So just to be clear.

--- Pricing ends ---

AARON

18:24 Yeah.

AARON

18:27 Yeah, I think you're right?

AARON

19:02 Yeah, sure.

AARON

19:18 Yeah, I appreciate it.

AARON

19:40 I appreciate it would.

--- Pricing ---

AARON

19:52 Yeah.

AARON

19:57 Well, window, yeah, it would do, you know, the Sage service model that he's pushing coordinate pushing on them. Do you know how much that?

HENRY

20:05 Yeah.

HENRY

20:09 Yeah. Wow. Yeah, that's the other thing. It's probably 60 dollars a month. There's no integration fee.

HENRY

20:18 You know, so that's gonna be. So... which level, where are you pushing for these guys?

AARON

20:26 They need premium because he, they have very complicated like contract pricing that changes from look, customer to customer. So they need premium definitely. And, but premium would let them get a connector. So we're up a custom integration. But I just have no idea how much that I would have to have time you go on a scoping call with him to figure out. I mean, honestly, like no matter what, I don't know how much it will be, but whatever the prices it's probably going to be outside the budget for six six tech shop.

HENRY

20:35 Yeah.

HENRY

20:48 Right.

HENRY

20:57 Yeah, yeah. And you know, so there's some other things SSO will not do.

HENRY

21:06 There's no preventative maintenance service contracts. So there's a workaround I've always done when requires, right? It's not elegant but it's doable. And then there's just stuff. I was working on a deal with Kurt I'm up here in New Jersey on a client that needed heavy duty service contracts. And, you know, they looked at Sage 100 contractor and SSO first. And after I saw the requirement like listen, you guys see service trade because that's what they do all day long.

HENRY

21:42 And for whatever reason, he's coming back to stage 100 with a workaround. I mean, it's a kluge all day long, and I'm open about it, right? This is what we do. Now, it's really hard with SSO is doing a work order and just specific to a piece of equipment, right? Like, you know, in your case, you have work orders, which piece of equipment or I have to go service, you pick it, right? Well, you can't do that. In the SSO, what you have to do is when you incur a cost, you apply it to a piece of the customers equipment.

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HENRY

22:18 So in other words, you can write down, go fix this chiller, right? On a note, but you can't pick the peace. So until you put a cluster record in other words, it, until you put material costs or labor cost on it. So again, a workaround sometimes is we have a miscellaneous inventory item which really isn't a cost, but you just pick it at that level. So it's again, it was way too many workarounds with the SSO and surface. It was good for very simple, especially if you're not in mechanical, right? If you're like a property management company or, you know, change a lightbulb kind of deal.

AARON

23:01 Sure.

HENRY

23:01 But anyway, we'll see what they say.

--- Wrap-up ---

HENRY

23:03 So that's my plan is to get an answer from my text. So on some of the functionality, you get them a price and, you know, see how it goes from there.

AARON

23:12 When do you think you'll talk to them?

HENRY

23:14 I'm like, I mean, I'll talk to them as soon as I get my answer, which again, I don't know when they're getting like texts are gonna give me my answer. If that's today, I'll talk to them again this afternoon.

AARON

23:24 Okay. Yeah. Well, they are all mechanical. So we have had a lot of people come over. They used to use SSO. No, I don't know why they came over. I just know that they did. So it must be a good reason for it.

HENRY

23:26 So, but yeah.

HENRY

23:34 Yeah... yeah, yeah, no request service trades a better product... but all day long, I mean, no, I, you know, when you look at it compare to what you do an SSL. I mean... it's night and day. I mean, three weeks, three or four weeks ago, we had a company sales meeting in back to back. We had presentations from SSO, BuildOps and service trade. I think service trade is, you know, the best looking and best functionality out of all three. So, you know, I know that I know what SSO does and what it doesn't do, and I'll let people know. So... alright, well, I will, yeah, soon as soon as I hear back from the M, I'll let you know where we go and keep you in the loop.

AARON

23:41 Yeah.

AARON

24:20 Yeah.

AARON

24:22 Well, I appreciate Henry to talk. Yeah.

AARON

24:33 Alright. Sounds good. Henry. Have a good day. Yep. Bye bye.

HENRY

24:34 Man. Thanks. You too. Take care.

The End