Call with Legacy Mechanical - Daniel Banta

Ben Bilhorn with Legacy Mechanical
Recorded on 1/11/23 via SalesLoft, 16 min.

Participants

ServiceTrade

Ben Bilhorn
SDR

Legacy Mechanical

Daniel Banta
Consultant

Topics

Transcript

BEN

0:00 Hey, is that any better?

DANIEL

0:01 It's perfect.

BEN

0:02 Okay. Cool. Yeah. So I have, it must have been that I call through my laptop. And so it must have been that I was picking up my laptop, Mike, for some reason. Sorry about that. Cool. So, yeah, kind of what I wanted to do today was, you know, get a little background on, you know, what kind of tech stack Legacy is working with? What kind of specs they're working with that kind of stuff. So we can be as prepared as possible for the meeting. We're probably gonna set up a discovery call with my territory manager to.

DANIEL

0:12 Yeah.

DANIEL

0:14 No worries.

BEN

0:38 Dive into that even further and then, you know, kinda go from there, but...

DANIEL

0:39 Okay.

DANIEL

0:44 Okay. Yeah. Let me share. Yeah, let me share what we've done so far. So, I have a, I work for whom we call nebulocity. So we're a full service it company, right? So we do everything from pulling fiber to installing ERP systems for customers, right? So.

BEN

0:51 Huh.

BEN

0:59 Wow. Okay.

DANIEL

1:03 I, I'm a consultant for Chris who's the, you know, the CEO president of Legacy. So, we've... we're already about three weeks into this project. So my team is come in and we've done discovery, right? So we have, we've put together an RFP and everything. So... my role is to help with, you know, we gathered all the requirements. So, we talked to, you know, 30 40 people within the company, you know?

BEN

1:20 Okay.

BEN

1:34 Huh.

DANIEL

1:35 This is a pretty easy opportunity just in the sense of everything's paper today, right? So, there's we're not replacing another ERP, we're not like we're replacing a three sheet carbon copied process.

BEN

1:41 Okay. Gotcha.

BEN

1:49 Jesus. Okay. Gotcha.

DANIEL

1:51 Right. So, pretty easy to set the bar, right? It's like if anything electronic is gonna be better, right? So, so what we've done is we, you know, we've kinda done the like, you know, traditional, let's talk to everybody, let's understand what people are looking for, but at the end of the day... Legacy mechanical is 50 percent service, 50 percent.

BEN

1:55 Right.

BEN

1:58 Yeah.

DANIEL

2:18 Construction. So an ffm is really the most important piece because he has with 65 technicians.

BEN

2:19 Okay. Gotcha.

BEN

2:27 You know, the term F, SM, that's awesome. I don't think I've ever spoke with anyone who's...

DANIEL

2:31 Well, you can imagine, I... yeah, I didn't dive so deep into this project already, right? So, like, I kinda know the nuts and bolts and stuff. And so I'll just give you a little background on where we're at when I came on board, right? So, I came on board like in December and.

BEN

2:32 On the term F. S. M.

BEN

2:38 Right.

BEN

2:47 You...

DANIEL

2:52 They were looking at, they narrowed down their search originally down to a software called FieldBoss.

BEN

2:59 Okay. Field, but, interesting.

DANIEL

3:01 Okay. So, I came in and said, hey, like, hey, before you sign that, like let's make sure we do all our due diligence and everything first, right? So, we basically took a step back, you know, did a full evaluation of everything and we basically come down to four options, right? You guys being the, you know, being one of the four?

BEN

3:20 Huh.

DANIEL

3:25 So, we've looked at just giving you transparency, right? So we've looked at FieldBoss, we've looked at Accumatica.

BEN

3:29 Yeah.

BEN

3:35 Okay.

DANIEL

3:36 We've looked at BuildOps and then we wanna look at you guys, right? And correct me if I'm wrong, but you guys are a pure... SM, right? You're not an all in one solution like a Accumatica or a field FieldBoss, correct? Okay?

BEN

3:38 Okay.

BEN

3:40 Gotcha.

BEN

3:54 That's correct? Yeah. So, we're service and service projects is what we call them. So, projects that are less than six months typically is gonna be our wheelhouse there.

DANIEL

4:00 Yeah.

DANIEL

4:06 Okay. Good. Yeah. So, you know, I come from the it world, right? Like I understand best and breed versus kind of, you know, the all in one solution, right? And, you know, and that's my role is to make sure what's best for the customer, right? So, you know, we have two all in one type solutions. And then we kinda have two standalone systems, right? That, and in my world, I come from the, we do a lot of ERP, but we do a lot of sap, right? So, our expertise, it's from an implementation, right? But so, what we're looking for at the end of the day, if it's... you know, let's put the all in one solution to the side for a second, right? Because they're not really your competitor.

BEN

4:15 Right, right.

BEN

4:26 Okay.

BEN

4:37 I don't know.

BEN

4:52 Right?

DANIEL

4:56 You're really like really we're trying to figure out, you know, it'll be your software, you know, BuildOps. And then in the back end, you know, we're either looking at either Sage or sap, right? So, what we're doing is also is looking for?

BEN

5:10 Okay. Gotcha. And what version of stage is it Sage intact that you guys would be looking at?

DANIEL

5:16 It would be whatever the most latest and greatest is we're not going to go buy an old system.

BEN

5:20 Okay. Gotcha. I know impact is there like cloud platform right now?

DANIEL

5:26 Yeah, it would have to be cloud or if you guys have the option to help us with custom integrations, you know, with any ERP?

BEN

5:33 We do, but, you know, we have a, we have a pretty good integration with Sage intact and our territory manager can talk about that more, but we would probably if that's on the table, we would probably urge go in that direction because we have a really good relationship with them there that's a great product. So.

DANIEL

5:53 Yeah. And at the end of the day, that piece will come down to the accounting team, right? That's evaluating sap or Sage.

BEN

5:58 Right.

BEN

6:02 Gotcha.

DANIEL

6:04 So, that part will come from there. But like I said, if, you know, if your product can kinda stand on its own and, you know, do everything all the way to like getting an invoice out that's good because like, you know, we obviously need payroll all that stuff, but at the same time, we don't want to be pressured into something that we don't really want, right? So, like if they don't really want Sage, I'm not gonna tell them well, you about this, you know, and you have to use Sage now. So we don't what we don't wanna do is be locked into that. So, like my suggestion to you guys is to

make sure because that's going to be on our evaluation is how flexible is the product, right? Are we forced into using a certain product or can we do whatever we want, right? So that's I mean, it's a no, go. It just means we need to understand the limitations, right? Of what we can do. So really where we're at right now, I can share with you the, you know, kind of version of the RFP that we put together and it's not there's dates on it and stuff like it's really... for you guys just to fill out and give us to us like as part of the due diligence piece of this and kind of a guideline of what's important to the customer, right? And, you know what we say kinda phase one.

BEN

6:12 Yeah.

BEN

6:21 Right.

BEN

6:26 All right. Yeah.

BEN

6:39 Right.

BEN

6:51 Right.

BEN

6:59 What?

BEN

7:09 Right.

BEN

7:16 Yeah.

DANIEL

7:17 Your world a little different because you guys are just doing field service.

DANIEL

7:24 So, in our phase one, we want field service, finance, reporting, project management, right? That's our phase one, what we're saying.

BEN

7:32 Okay.

DANIEL

7:37 And if you don't have phases, like if your product is kind of a, you know, you buy one one license, you get everything that's fine too, but we're just saying like as far as like what's important of implementation and understanding it's field services number one.

BEN

7:51 Okay. Gotcha. Cool. Yeah, no. And yeah, we have, yeah, we have some, we'll be able to talk more about that. But, yeah, that should be fine.

DANIEL

7:53 Right. So.

DANIEL

8:00 Yeah.

DANIEL

8:02 Yeah. Yeah. So, I'm just trying to frame it so that way like you guys can kinda get right to where we need to like, you don't have to do a lot of fluff and all of this stuff like, you know, we like what we see on your website. Now, we just need to see like we've seen a lot of stuff we like on people's website. But when we actually get into the demo and using the product, we're like it's a little different than what's on your website?

BEN

8:07 No, no.

BEN

8:22 Right, right. Definitely.

DANIEL

8:24 It looks a little easier in your to video that you're showing us in a real life demo, right? So.

BEN

8:29 Right.

DANIEL

8:31 So, I think really what's important, like I said, if anything that you can, you know... set your team up for a successful demo would just be mobile app is got to be the best thing that you guys have because no one cares about the computer screen and how you can sort stuff by this like, you know, people have been using excel sheet, excel, sorting for years and just kinda giving you a little highlight of like other demos. We did like the highlight of the product is like, you can sort this like, okay, like, you

know, we could sort, we've been sorting data for 100 years, right? Like that can't be the cream of the crop. And then we kinda get to your mobile app. And then it's like, yeah, okay. Well, like we have very non technical people. We need the thing to be super intuitive and easy to use, right? Or this all projects doesn't even make sense to do. We might as well keep the paper... because all we're going to get a zero adoption, right? And we just spend all this money. So, whatever you guys need for me to kinda fast cycle this to the beginning, I can answer a lot of the questions. I have a lot of information. I mean, we have a, I have a dedicated project manager from our side.

BEN

8:53 Right.

BEN

8:57 Right.

BEN

9:19 Right, right.

BEN

9:23 Right. 100 percent.

BEN

9:27 Yeah.

BEN

9:42 Okay.

DANIEL

9:43 You know, we have a lot of documentation, but I'm just kinda giving you like the highlights of.

DANIEL

9:50 You know, take us through your mobile app, right? Like everything else, we kinda know you guys probably do and everybody does, but the mobile app is definitely one of the big decision makers for us because our technicians are the most important people in the company.

BEN

9:51 Yeah, no... this is perfect.

BEN

10:05 Cool. So, let me do this. Let me set up. Let me set up some time for you to talk with Laura and she's probably gonna, this is going to be more of a kind of initial discovery call on her end. She likes, she's our director of west coast sales. We actually

had a change up in our territory managers. So I was originally gonna connect you with Dan Erisa, who is our strategic guy that was filling in for California, but now we have.

DANIEL

10:17 Yeah.

DANIEL

10:30 Okay. Yeah. I think, I think Chris tried to introduce me to him, but I think, yeah.

--- Next Steps ---

DANIEL

10:34 So if you could, just... if you could include us all, like because I think I got included on an email... after we got in, I think I was on an email with Dan, but if you can just full circle it and just be like, hey, talk to Dan, is Daniel from nebulous this morning? And we need let's get a call set up right away so he could take us through their requirements.

BEN

10:41 Yeah.

BEN

10:56 Perfect. Cool.

DANIEL

10:57 And I could do like I said, I could get you guys up to speed real quick.

BEN

11:02 Yeah. So let me go ahead and I have her calendar open. Do you have some time tomorrow to... meet with her for like 30 45 minutes somewhere in there?

--- Next Steps ends ---

DANIEL

11:16 Yeah. Let me, just, let me pull up mine real quick here. Tomorrow should be fine.

DANIEL

11:23 Is she on the east coast?

BEN

11:25 No, she's on west coast, Huntington Beach.

DANIEL

11:27 Okay, perfect. Okay. Maybe I had a missed call from somewhere down there. Maybe she was trying to reach out to me already?

BEN

11:34 Yes.

DANIEL

11:38 Thursday, right?

--- *Wrap-up* ---

DANIEL

11:41 Yeah, I could do anything after.

DANIEL

11:46 Eight a. M.

BEN

11:48 Cool. I think we have availability at nine am your time, right? That would be 12 our time. Yeah, that should work.

DANIEL

11:49 Pacific Time.

DANIEL

11:57 Okay. Yeah. If you wanna book that and give her a call and tell her we talked and.

BEN

12:01 Yeah. And I'll have notes on everything we've discussed up to this point. She'll probably have more questions, but yeah, it'll be her, Katie who's the new, like California specific territory manager, she'll also be on that as well. And then, yeah, whoever you want to bring in from your side?

DANIEL

12:18 Okay.

DANIEL

12:23 Yeah, I'll forward it off to my PM... so she could be on to listen if she needs to be. And if not, like I, I've got a lot of the intimate knowledge of what's going on. So like it's all fresh in my head. You know, we've been working on this thing.

BEN

12:27 Okay.

BEN

12:39 Cool. Yeah, definitely.

DANIEL

12:42 They want, they wanna move quick. So like there's nothing stopping them from pulling the trigger besides demos. And do we like it like, you know, at the end of the day, there's you know, from the customer side for me to keep, you know, to get this moving forward? Like we have to, well, you know, Chris and the, you know, vice president of support and, you know, the guys that will be in the room like when we do the demo, but like as far as all, like the integration and all the back underlying stuff, it stuff, they look for me to answer those questions and make decisions. So.

BEN

12:47 Nice.

BEN

13:06 Huh.

BEN

13:16 Okay. Gotcha.

DANIEL

13:19 So, we just really just gotta wow them with the product. And then... you know, like I said... if you focus and dive right into your mobile app, you guys will be.

DANIEL

13:34 Really liked... you know, like these guys don't have a lot of time. They wanna kinda get right to the point. So, if you could, when we get there, I'll help prep, you guys are like, this is what people wanna see. Don't worry about all this other stuff. You're just, you know, you're just frustrate people.

BEN

13:35 Cool. Hi, Cara.

BEN

13:50 Yeah, yeah, definitely. I just. Okay. So, I just pinged Lauren and I didn't realize she's in Texas this week. I thought that she might be because I know she's at the mep conference, but I wasn't sure if she was on the road. So let's talk to.

DANIEL

14:03 Okay. Yeah, it doesn't matter to me like that anytime after eight.

DANIEL

14:11 A M, Pacific Time, you know, I mean.

BEN

14:13 Well, let's can we look? I don't obviously, I don't wanna push it, but if we could look to next week, like let me...

DANIEL

14:22 You might be that might, you might be out of the, you might be out of the playing field especially if they like BuildOps today.

BEN

14:28 Really? Okay. Let me see.

DANIEL

14:30 That's going to be too far out, you know, Chris is not going to have the patience to wait that long. I just being honest, like he wanted to buy this thing two weeks ago.

BEN

14:35 Right.

BEN

14:37 No, that's valid.

BEN

14:40 Right, right. Okay. Cool. Let me do this. I'll...

BEN

14:52 I'm gonna give you a call right back because I'm gonna see if I can probably get someone else to take the, take that or at least like chat with her and figure out what a time is this week. I'm pretty sure that I should be able to find some time, but it's gonna take a little bit more.

DANIEL

15:07 Okay. Yeah, just call me back or shoot me an email once you find a time, and then if I accepted, that means it's good. If not all, we can get on the phone and try to find a time.

BEN

15:08 Yeah.

BEN

15:17 Perfect. Sounds good. Cool. Well, either way, I appreciate talking to you today
and you'll hear from me in probably 15 minutes.

                            DANIEL

15:23 Yep.

                            DANIEL

15:28 Okay.

                              BEN

15:29 All right. Take care bye.

                            DANIEL

15:30 Sounds good. Thank you.

                      The End