



EXPERT INTERVIEW

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Alex Kracov, CEO of Dock, on rethinking the primitives of external collaboration

TEAM

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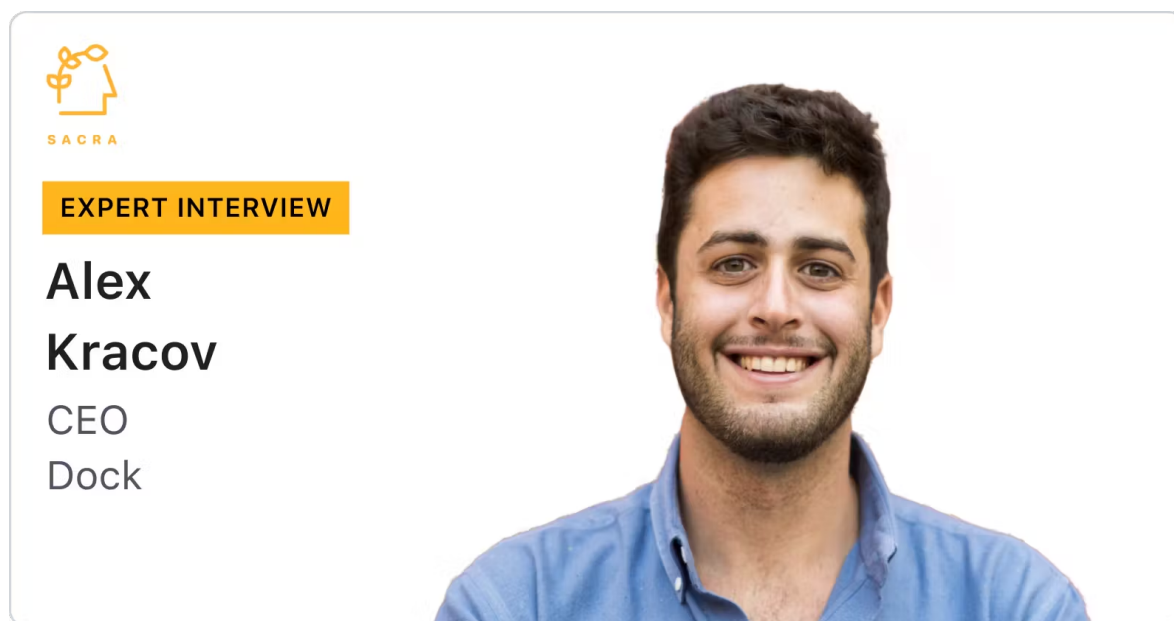
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Alex Kracov, CEO of Dock, on rethinking the primitives of external collaboration

By Jan-Erik Asplund



Background

Alex Kracov is the CEO of collaborative workspace Dock. We talked to Alex to learn more about building a horizontal productivity tool ala Airtable or Notion, how the entrepreneurial culture at Lattice helped Dock get started, and what people get wrong about selling into the enterprise.

Interview

Can you give an introduction to Dock and the problem that you're solving?

Dock is a collaborative workspace between two companies. The main problem we're trying to solve is helping companies work better with their customers, and helping them manage the full customer life cycle.



The customer lifecycle runs from the intro or demo call that a client has with somebody on the sales team, through the whole sales process, and into the onboarding of the client and the ongoing maintenance of that relationship. It also includes things like sending over deliverables, QBRs, and renewals. Throughout that full customer life cycle, Dock is a collaborative workspace where client managers can organize all the information in the relationship.

There's a lot of fancy features that enable both sides—the customer/buyer side, and also the internal sales and customer success teams. We started with the customer relationship as the first relationship outside the company, but there's also an opportunity for more than just customers. That's the most important relationship, but there's also investor relations, candidates on the recruiting side, and other external relationships. There's a big opportunity to build b2b collaboration software, but we're starting with the customer relationship and that will be our focus for the foreseeable future.

Can you tell us about Dock itself and how the company came about? The company emerged after you were working at Lattice. How did the marketing teams and sales teams work together there, and how did the sales motion help inspire the idea for this kind of tool?

I joined Lattice as the third employee and first marketer so I learned a lot along the way and spent about five years there.

The inspiration for Dock came when we were trying to move up market and sell to bigger customers. Lattice started by selling to basically other startups and YC companies, and we had about a \$4k average contract value (ACV). We were trying to move up market and sell to bigger companies—the Slacks, the Pinterests, the Flexports of the world, those larger tech companies. As one of the leaders on the revenue team, I had to figure out how we approached this challenge.

At the time, I was making a lot of content for the sales team—whether that's an ROI analysis or a customer case study, or PDFs that explained our product in different ways. We were considered an SMB startup solution and we needed to update our positioning and collateral to appeal to bigger companies, so we were constantly updating our enterprise solution to



present to buyers. What I noticed was that it was hard to get the sales team to send over the right things. They'd send over maybe half the story, but they'd leave out something.

Then, the bigger problem I noticed was that the sale came down to enabling the HR buyer. We had a point of contact who was a champion on the other side, and we needed to give that person the things they needed to convince the rest of the organization to buy Lattice. Our contact would need to convince the rest of the HR team, and convince the managers, the executives, and all the other stakeholders. The sale came down to change management and getting all the stakeholders on the same page.

I was getting into Webflow at the time, and it was a tool that I personally had fun playing with. We'd built the Lattice marketing website site on Webflow. I thought maybe there was a way we could set up Webflow and organize all the content to make it a nice resource to send over to the buyer for them to pass around the organization. I basically built a Webflow page that AEs could duplicate, swap out the customer, and toggle onto different types of case studies for different industries.

That was about three years ago, and a couple sales reps at Lattice really started using it. I looked back at the data after a couple years and we'd made almost six hundred of these partnership portals. I thought, 'There's something here. There's something here in packaging up content for the buyer, making it easier for them to buy.'

That Webflow experiment was the original inspiration story for Dock. I'd always wanted to start a company—that's why I joined Lattice in the first place—and this was something to pursue. Now, I've expanded the concept and built more features outside the prototype, but that's the origin story.

Looking at Lattice's Invest In Your People Fund prompted the question, was there an entrepreneurial culture at Lattice that rubbed off on you and helped you along?

From day one, I said to Jack Altman, the founder and CEO of Lattice, "My goal is to learn how to build a company here and learn from you, and that's why I wanted to join." It was a constant conversation—and Jack taught me about SaaS, how to raise money from VCs and the whole startup game.



Jack was very generous with his time with me, and. We always talked about ideas, and it was something that was very encouraged. I think a lot of the early employees at Lattice have that entrepreneurial spirit

It was weird for me to leave the company because I spent so much time at Lattice. I made my career there, and I could have spent more time scaling to IPO, but I did have comfort in knowing that when I left, 'I know I'll be supported both from a philosophy standpoint, but also monetarily with the Invest in Your People Fund.'

What kind of trends or evolution are you seeing in external collaboration generally? Are people doing more of it, or different kinds of collaboration and need more software to help do it?

The short answer is yes. The long answer is if you look at the evolution of the Internet, there's been increasingly more ways to connect and work with other people. It started with email, and then there was this concept of the extranet, which was an old school concept. There's intranets, which are internal wikis, and then there's the extranets, which was basically a dream of a private network of companies that are connected. That didn't quite happen and we don't use that term as much. There's Microsoft SharePoint, which is kind of that, and I would argue Dock is building a more modern version of it, although that's not quite how I positioned it.

What happened instead of this private network or extranet, is there was an explosion of SaaS products, where people connected in different ways. Slack is a great example of this, and the evolution of Slack Connect, people are trying to work with each other through that. Then there's all the Google Docs and the collaboration that's happening there, Miro boards and Figma, and Teams, and Asana, and every other project management tool. Instead of there being one dedicated external collaboration hub, we now have an explosion of all these point solutions, where people are collaborating in their own little silos. Each department has their own product where they're collaborating with other people.

One of the reasons I think Dock will be successful is, at some point, there's a need to aggregate all this collaboration. There are so many different ways to work with each other and they're



all useful. Loom and Slack Connect are really helpful, but there needs to be some aggregation point. Especially when working with a customer, you can't ask them to look in a hundred different places. That's a time consuming process and it's just not ideal for a customer relationship, which should be pretty buttoned up and thoughtful.

One of the other big trends here is product-led growth.

What's your take on what teams get wrong about product-led growth and how to execute on it, that Dock is a reaction to?

Product-led growth is a funny term, because it's been around since the beginning of SaaS, it's just been called freemium and free trials. But now we have a new buzzword for it. I agree with the overall trend, that people want to try before they buy - people want to experience and play around with the product. The days of a cold call sale, or even just a demo pitch deck sale are slowly dying. I remember at Lattice, I was like, 'I got to get my pitch deck right.' A sales team should still have that today, but it's way less important, because people are going to try before they buy.

But the classic evolution of a SaaS company is to move up market, because jumping straight into the enterprise is hard. There's a couple companies who have done it, Workday is the best example. They knew what they were going to build, they were going to sell to only giant companies, and they built that feature set and went after it. Most SaaS companies, especially in the YC iteration model, start with smaller companies and move up over time. Product-led growth, and people just signing up and using the product, fits better with an SMB/smaller company model. End users at big enterprise companies will come in that way. But closing the deal—that perfect sequence of signing up, trying and then buying without talking to the company—is really for either a small company or a single person at an enterprise.

What happens at every single product-led growth company is they build a sales team and they move up market. It's just a question of when companies do it. Companies like Stripe and Twilio and these generational companies are doing it post \$100 million in revenue, which is wild.. But other companies who don't have as strong a product market-fit need to layer on a sales motion earlier. The sales motion for PLG looks a bit



different, more collaborative and consultative. More oriented around product usage.

Basically, product-led growth always ends up in sales and it's just another way to get a foot in the door that matches with the modern buyer experience.

Do you think about Dock as forestalling the need for sales, or is it more like leveling up your sales team to focus on other things than what they would be focusing on?

Right now Dock is a supplement to the sales process in helping a single person explain the product they're selling. It's a nice asset the sales team can use as they work to support champions through the sales process.

Here's the trend that's happening: It used to be that buyers couldn't get information about a company until they talked to a salesperson. Those days are over. Now, buyers are going to do a ton of research before they ever talk to sales. They're going to look at G2 and read the reviews. They might play around with the product. They're going to read your blog, they're going to read your competitor's blog. They're going to talk to their friends. They're going to go to their Slack community and talk about it. They're going to do all of this research, and then they talk to sales to get a couple questions answered—or just it's a necessary evil in some ways.

That changes the role of the salesperson because their window to influence the deal is way smaller and there's way more competition for them to figure out how to stand out. Salespeople need to be more collaborative. They need to be more thoughtful about how their product can actually help solve that customer's need.

In this new world, the sales teams need to curate information for customers. This is where Dock really comes in, because there's so much information out there on the internet. There's so many different points of view a potential customer could encounter. Dock really helps a salesperson curate the information for the buyer, and then ultimately make that purchase easier and make explaining that purchase easier.

So when it comes to seller power versus buyer power, the power has essentially shifted to buyers?



It has definitely shifted to buyers, there are so many choices. Most software products become a commodity over time. There's standouts, Stripe and Slack and companies like that.

But for example for Lattice - there's a thousand other performance review and performance management companies out there. So at Lattice, we needed to be really good at explaining why we were different. Not only explaining but showing how we were different. That's where the product-led growth and the Dock stuff comes into play and tools like Reprise are helpful for showing why a company is different.

Some comparisons we looked at for Dock were Airtable and Notion, these horizontal tools that are usable for a lot different things. Why did you choose to approach Dock in a horizontal way versus designing it specifically for sales or another internal team?

In some ways, it felt like a bigger problem to solve, and something more fun to go after. I didn't want to just build another sales enablement tool, there's a million of those out there. I was like, 'If I'm going to create a company, if I could shoot for Mars, maybe I'll land on the moon.' I want to have a shot at creating a generation-defining company that really redefines B2B collaboration.

But then, pie in the sky reasons aside, as I looked at the problem and the features that we wanted to build at Dock, I realized that these were problems that happened across a variety of different industries and departments.

Even in the sales and customer success examples, the way that SaaS companies approach sales and CX is not radically different from accounting firms, or marketing agencies, or brand design agencies and video agencies. They all have the same sort of core problems around how they collaborate with customers and people outside the company. And the components that they need in Dock are roughly the same. For example, our project management tool is called a mutual action plan for sales, an onboarding tool for customer success, and a project plan for agencies.

I realized that we can build components that work across a variety of different use cases. The investor relations use case is another interesting one, where DocSend is an extremely



popular tool. I realized as we were building Dock that we've actually built, what I would argue, is a better version of it. There's certain things that we need to get to feature parity on, but the same components that we're using for the sales and CX use case can be repurposed for the investor relations use case, or even a recruiting use case as well.

The hard part with building horizontal products is focus. In the early days, we need to nail and then scale. We earn the right to support different use cases over time. We're starting with the most important relationship, which is the customer. Then, we can evolve Dock to focus on other B2B relationships.

Customer revenue split sounds like it's mostly on the sales customer success and less so on the other use cases for now?

Exactly. And that's partly just the features we've built so far and who we've gone after more purposefully. We integrate with Salesforce and HubSpot, so that works well for the sales use case. If we wanted to go after the recruiting use case, we would need to integrate with applicant tracking systems and we haven't built that yet. Or, the finance use cases would require building security and data room auditing elements. We have a lightweight version of that already, but over time, I think we could go after that market.

Another parallel with Airtable might exist for Dock: Airtable gets integrated into an organization and people start using it for all kinds of things. By the time the company graduates out of it for a CRM, employees are using it for so many things that it becomes harder to transition. Does that resonate with you as a retention mechanism, that Dock might get used throughout the team?

That's exactly what I want. It happens on the revenue team right now, where it starts in customer success and then the sales team hears about Dock and they start using it. Or the reverse happens.

Marketing is the other big constituent as they are helping sales and CX setup Dock templates. And some marketing teams are using Dock for account-based marketing and personalized landing pages.



The cool part about Dock is there's a Calendly-like effect to growth. Everyone who sees the Dock workspace—both internally and externally—is like, 'Oh, that's cool,' and then they go and check out Dock.

That's happened a couple of times, and we've gotten some customers that way, which has been the dream scenario.

You mentioned the components that Dock has to build for each use case are pretty similar. Notion was built around primitives of tables, sheets, and docs—from a product design front, what are those key primitives for Dock?

Dock starts from a template. A company can set up a template themselves, or start with one of Dock's templates. It's a template of a workspace, and a workspace is where you're working with someone outside your company.

Workspaces are made up of sections—similar to Notion blocks or Google slides. Each of those sections are fully customizable. Dock is built on a rich text editor and users can add components like PDFs and other embedded content. Anything that can be iFramed, users can put into Dock. We can embed Loom videos, Typeforms, Looker dashboards, PandaDoc proposals and more.

The way we think about the future of Dock is that we're building apps on top of the platform.

Project plans are the first app we've built into Dock. In the future, we're planning to build more apps. The next one we'll do is pricing quotes and we have a long list of other ideas that we'll pursue as we scale the engineering team.

Each of these apps will correspond to different use cases. We can build an app for sales teams, CX teams, agencies, and accounting firms.

Another parallel to draw is Wix, the website builder, who did this really well for a much different persona. When you build a website in Wix, they have preset things for restaurants versus preset things for nail salons. A restaurant needs a menu builder, so they have a menu app that makes it easy for a restaurant owner to add to their website.



Over time, Dock is doing something similar for B2B. We're really focused on the full customer life cycle, so we're creating different apps for each touchpoint.

Can you actually sell into customer success today? Is that a real department or function?

It is a very real department. It's also called account management.

In my experience, the department is typically set up in a couple of different ways, which evolve. Companies will have onboarding and implementation people—that could be done by a customer success manager or a specific onboarder or implementation person. Then companies have customer support, who are the people who are responding to tickets in Intercom. Then, there's customer success managers and they manage a book of fifty accounts. Usually, within that team, they're separated between customer size or different segments. For example, Enterprise versus SMB.

The job of a customer success manager is to be proactive, to really help a customer get usage out of the product. That could be setting up QBRs, giving customers ideas for how to use the product better and things like that. At Lattice, people would often start with two of the products, like reviews and goals, and then it would be on the customer success manager to try and get them to adopt other products like compensation, because we knew that if they adopted more, it would be stickier.

That's how it's set up, and it's definitely a real department. The software they use is interesting. They kind of use CRMs, they use Salesforce and HubSpot a little bit, but it's mainly to get information from the sales team. And then different CX teams have different relationships with Salesforce or HubSpot post sale.

A number of CSM teams will use platforms like Gainsight or ChurnZero, dedicated customer success platforms that give a little bit more visibility into customer health. And provide different ways to engage with customers, like sending them an email.. Those platforms get mixed reviews. I haven't used them personally myself. I've looked at them, but I know they can take a long time to set up. The value there is a little bit mixed at times, because companies can do customer health scoring



in Salesforce. We did it at Lattice, you just have to set up the engine. A lot of those dedicated tools are helpful for CX teams as far as having an operating system to work from. Different teams have different appetites about whether or not they want to move in that direction.

Companies really have to choose one: 'I'm going to be a Gainsight person and work from Gainsight, and this is how I'm going to manage my CX team.' It's going all in or nothing in, that's my interpretation of it.

Now, there's an emerging class of companies, and I put Dock in this, that are focused on helping onboarding, specifically. There's a company called Arrows, who's doing this with HubSpot. There's Rocketlane, GuideCX, and a number of other players in the market. In fact, the onboarding use case is where we really have hit our stride: If we can get in with a CX team when they're doing an onboarding, that's a burning need. What makes us different than all the other products is that companies can keep using Dock post implementation. They can update their Dock space into a client portal, and host QBRs, and launch new products, and tell people about it.

**What's your take on the product-led growth CRM space?
Are they adjacent or complementary to what you're doing?**

Conceptually, it makes sense why they're building those products. The concept of a product-qualified lead and things like that are important and necessary for product-led growth. It's true that visualizing and getting that data into your CRM is hard, and taking actions off that is also difficult. My take with this emerging market is that companies can do all of the same stuff in their CRM. They can set up product-qualified leads, they can pipe in the data, and set up all these reports and different things with a data analyst and a good marketing ops person. It's just hard. So these new tools shortcut the effort and make the concept of PQLs more accessible.

We talked to Arrows about this same topic, and with them, it's more checklist oriented. The checklist completion gets fed into HubSpot to give a proxy for product qualification. Dock integrates with HubSpot and Salesforce, are you doing something like that, feeding info in? Or is the integration more in the sense of the handoff to the salesperson? Do you consider that an important thing for Dock to solve?



We push all of our content and onboarding data into Salesforce or HubSpot. We give the users different filters to determine how much data they want to push. We know when people view a workspace, when they complete different onboarding tasks, and when they watch or download something.

I look at that data as being extremely valuable in a couple different ways. One is on the sales side for forecasting and lead scoring.

Forecasting is the number one problem facing sales leaders working in growth at public companies. A major part of their job is to figure out the forecast. The problem with traditional forecasting is it's basically a combination of where companies are at in the opportunity stages in Salesforce, but a company can be stuck in an opportunity stage for a while, and they won't know what's happening within that stage. Companies like Clari have tried to get a sense of it using email activity, or just activity, but I would argue Dock and systems like Dock get much richer data to inform a forecast.

We can basically push activity data to Salesforce, and it's the same on the customer success side, to give companies a sense of how engaged their customers are with their onboarding plan or even post onboarding. The data piece is very important, especially for leadership and managers. It's cool for a success manager or sales rep to be like, 'Are my deals engaged or not?' But for the leadership teams, that's very much a need—'Where am I at with my implementations?' That concept is not really that easy to do within Salesforce without using something like Dock.

What is Dock replacing in the sales stack? It sounds like it's replacing certain kinds of email, and maybe spreadsheets, is that how you think about it?

It depends a little bit on where they are in a company life cycle. For startups and most people, Dock would be cleaning up the demo follow up email, or Google slides. Dock can take all that and put it into one place. It can also eventually replace proposal software, and companies do this in Notion today too.

As a company matures and grows up, Dock will eventually replace the Highspots, Seismics, and Showpads of the world.



Today, I would say we're more of a complement alongside these platforms for customers who want a powerful collaborative workspace.

Then, it just depends on what applications companies are using. Some companies use DocSend to share information. Generally, there are systems that companies are using to share all their sales and marketing product collateral, whether it's just email as the most basic form, or they have a legacy player that they're using to host and share content.

Is that a challenge from a sales front? With something like Lattice, there's lots of performance review software, but the upside is it's a clear need that people have expressed. There's so much sales software, so from a sales point of view, is that a challenge, to add another tool?

Getting salespeople to pay attention and spend time on changing a workflow is definitely a challenge. I ask myself all the time—how can we become an urgent and need-to-have solution? That's the number one thing I think about.

Right now, if I'm very honest, Dock is a nice-to-have. It's definitely a better way to close deals and to have a buyer experience. But could you do things outside of Dock and live without it? Yes. I know it closes more deals, I don't have perfect data to prove that, but anecdotally, Dock is a better way to do sales. But we need to build things that make it a must-have.

One example of that could be quotes, payments, and signatures. Companies need to close a deal. Once we add a feature like that into Dock, there's a need-to-have trigger for when companies use Dock.

I would argue though, on the customer onboarding side, we are closer to a need-to-have. Companies have to onboard their customers and they could do it in a spreadsheet, but if they want to do it properly, they need to use a system like Dock.

Have you seen that whoever is responsible for onboarding is the one to bring Dock to the rest of the organization?

We see it both ways. It's just whoever we caught the attention of—whether it's a salesperson or CX person. Then oftentimes they'll bring the other person in, and we see that as a huge



opportunity, too. Another way to think about Dock is that it's like a client-facing CRM. It's a record of what things were shared with the customer. Dock becomes a helpful tool for sales and CX to stay on the same page, because they're always dealing with internal notes in Salesforce. But if a CX person can actually go look at the sales workspace and see what got shared and where they are at with their plan it becomes a very helpful resource.

There's a category emerging here, "sales data room," how does Dock fit into that?

I started building Dock as a personalized webpage, essentially, and then we were calling it a collaborative workspace. Later, I was on G2 and read their description of a sales data room, and realized that's exactly what we were doing. Going back to the finance examples of DocSend, that's a virtual data room; it's the same for mergers and acquisitions of every company in the world, they have a virtual data room. I stumbled into the sales data room or digital sales room category, but that's exactly what we're building.

The big difference between Dock and the other providers out there today is that we operate from a very flexible template. Companies can really craft the data room and make it customized to their process and their content. We support multimedia embeds for Loom videos, plans and more. And every other digital sales room provider on the market, to my knowledge, is a hard coded template. It's too prescriptive and in-flexible for most companies.

But, it's interesting to see the digital sales room category emerge. More and more customers are coming to me on calls like, 'We're looking for a digital sales room, we're comparing you against these other candidates.'

The cool thing is that we've had a lot of positive conversations around digital sales rooms and closed a number of deals with this positioning.

It's great to be considered an up and comer in an emerging category. That's exactly where I want to be at this stage of the company.

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