Date: 12.18.25

Name: Steve Nowak

Stage: Closed Won

Company Size: Corporate Level

Number of Techs: 11

Job Title / Level: Head of Service Organization

Access Customer Support

## Steve (00:00:25 - 00:00:51)

It foreign.

## Moderator (00:00:57 - 00:00:59)

Hi Steve, how are you?

## Steve (00:00:59 - 00:01:00)

Good.

## Moderator (00:01:01 - 00:01:03)

Thanks for making time this morning.

## Steve (00:01:04 - 00:01:07)

Good. No, no problem. No problem at all. What's going on?

## Moderator (00:01:08 - 00:01:40)

Well, I run a market research company and I'm working with service trade because they want to better serve their customers and earn the business of new prospects. I get the pleasure of meeting new people for a living and have short conversations to hear about their job. And they want to know about your experience just evaluating them, the problems you were trying to solve. And we'll record a 30 minute conversation. You'll be compensated for your time and I'll be compiled with a bunch of other conversations to give them some. Some insights.

## Steve (00:01:40 - 00:01:50)

Cool. I don't need. I don't want the compensation. Give it a. Danny, he's. I don't doing this. They. They were very helpful. So kind of our.

## Moderator (00:01:51 - 00:02:00)

You know, I can guide you through if there's something top of mind, we can talk about that. But I've got. I can just guide you through a set of questions, whatever. However you want to go, however you.

## Steve (00:02:00 - 00:02:06)

Want to do it. Like I can tell you the story of how we landed with them or we can. You can ask me. It doesn't matter.

## Moderator (00:02:06 - 00:02:19)

Cool. Yeah, let's get to that. Let's just start with some context if you don't mind giving me background information. Just scope. So first, can you tell me just about yourself, the role you're in and the company you're at?

## Steve (00:02:20 - 00:02:33)

Access Michigan. I've been here three and a half years. I run our service organization. I've been in the service industry since I was 18. I just turned 42. So this is what I do.

## Moderator (00:02:33 - 00:02:38)

Awesome. And how many technicians does your company currently employ?

## Steve (00:02:38 - 00:02:41)

I have 11 technicians currently. Yep.

## Moderator (00:02:42 - 00:02:47)

And you said it's service focused. Does that mean zero projects like construction?

## Steve (00:02:47 - 00:02:52)

We have another division but my portion of the company is the service side.

## Moderator (00:02:52 - 00:02:53)

We got it.

## Steve (00:02:53 - 00:03:06)

Equipment sales. We do a power service parts contractor direct. So but certainly it's coming in just for our service group, us and power as well.

## Moderator (00:03:07 - 00:03:14)

Awesome. And just so I understand, how many technicians are on that project side, the power side?

## Steve (00:03:14 - 00:03:17)

They have three, I believe.

## Moderator (00:03:17 - 00:03:23)

Okay. And then the portion of the business that's not using service trade. How many technicians are on that side?

## Steve (00:03:23 - 00:03:28)

They're not really technicians. It's sales guys got IT equipment into the market.

## Moderator (00:03:28 - 00:03:37)

So. Yeah. Cool. Well, what triggered your need? What were you looking to solve or accomplish?

## Steve (00:03:38 - 00:04:43)

So we currently use Spectrum and very my understanding, good accounting software. Their service platform was not very strong, not a lot of support. Whenever we had a problem, they Couldn't help us. It would take. And then they want 250 bucks an hour just to talk to us and. And then they would say, oh that's a great problem. We have no idea how to fix it. Accounting, not service. So I wanted something service based. So we went to the AHR show this past year and we met service trade. We went to a bunch of different booths, didn't know what we wanted. We kind of had qualifications of what we needed. I sent the team there, four people, they came back and said Steve, you like this? This, this, this. So that's when we got into the interview process and that's where we met Danny. And honestly we thought service trade was going to be the weak sister honestly of the bunch. And it turned out to be the best by a long shot.

## Moderator (00:04:44 - 00:04:51)

So yeah, what about the initial perception of service trade versus the others made them feel that way.

## Steve (00:04:55 - 00:05:11)

It wasn't one of the big boys on the market. Right. It didn't come across as. So I set it up. I'm not a technology guy. I'm. I'm a caveman. I still have a notepad with check boxes like a camera, you know what I mean? Like I'm.

## Moderator (00:05:11 - 00:05:11)

Yeah.

## Steve (00:05:11 - 00:05:59)

So I'm like I'm probably not the guy to go. So I sent two of my good techs that are very tech savvy, technical savvy, and then my two coordinators. But I helped lay it out. So I looked at the show, all the booths. Who has service software made the list. And I never heard of service trade. Didn't know much about service trade. I knew enough that just another version of a software what probably made it. So going through the demos, that's what we started with everybody. The demo presentation they put on was really spot on. They did a great job with it. That was really the trigger for us. We sat through a couple other ones where we thought, wow, this is going to be really good.

## Moderator (00:05:59 - 00:05:59)

This is.

## Steve (00:05:59 - 00:06:09)

This is like a big name. And it just came across clunky and flat and probably did a disjustice to the product, to be honest with you.

## Moderator (00:06:10 - 00:06:19)

Now when you talked about the quality of the demo, was it the quality of what they were showing you itself or the pitch or the. The both things combined.

## Steve (00:06:19 - 00:06:29)

Oh, like I. Danny is very dialed in. He knew the product well enough where he wasn't just a sales guy.

## Moderator (00:06:29 - 00:06:29)

Yeah.

## Steve (00:06:29 - 00:07:13)

He could speak on it. He ran the demo. It wasn't. We did some where there was like five different people on. We'd ask questions and no one would know the Answer. I think Danny knowing the product well enough to walk through a demo confidently. And we didn't want to go in the weeds on that. We just wanted to see kind of high level. And he did a really good job, answered the questions. There's stuff he didn't know, but he got back to us really quick with the answers. Really helped us kind of narrow it down. We narrow it down between them. Service trade. I believe it was yield ops or field something. And that's when we did the deep dives.

## Moderator (00:07:14 - 00:07:27)

Yeah. Stepping back to that conference and the original evaluation, do you. Do you recall or do you have anywhere written down, like who the options you considered and perhaps were ahead of service trade in the beginning?

## Steve (00:07:29 - 00:07:33)

I check my email for that.

## Moderator (00:07:33 - 00:07:41)

Yeah, that'd be useful if you don't mind. They're, you know, trying to figure out how to position and present themselves so that people from the beginning, think of them the right way.

## Steve (00:07:43 - 00:08:10)

No, for sure. Like I said, it was. Danny had a lot to do with us enjoying it. And I'm not team Danny. This guy is. He's. He was super. I do a lot of sales for my job too. So I appreciate people following up and doing what they say. Right. I always. We always make the joke. People always do oversell and under deliver. That wasn't really the case with Danny. He was.

## Moderator (00:08:10 - 00:08:10)

Yeah.

## Steve (00:08:11 - 00:08:16)

Kind of followed through and did a really good job. Let me grab my coordinator. She's gonna. Off the top of her head.

## Moderator (00:08:16 - 00:08:17)

Sure.

## Steve (00:08:32 - 00:08:47)

Who are these service companies? We talked to never came back from HR and demoed one. I think it was like computer. Let me. Let me grab my notes. Yeah.

## Moderator (00:08:50 - 00:09:01)

You. I was just pulling that. You mentioned there were some things you didn't know what you wanted. There were some things you needed. Can you walk me through some of that criteria of like, we had to have this. And then we found out that this was actually useful also.

## Steve (00:09:03 - 00:09:06)

Let me wait till Teresa gets back. I'm gonna have her join us.

## Moderator (00:09:06 - 00:09:06)

Okay.

## Steve (00:09:06 - 00:09:12)

Great detail oriented. She made a lot of list of the stuff we needed.

## Moderator (00:09:12 - 00:09:12)

Sure.

## Steve (00:09:12 - 00:09:28)

I know. One of the big things we wanted was tracking history for equipment. Right. So my tech goes out to look at this unit Spectrum didn't give us a very good history for my guys to see. It just puked everything in there.

## Moderator (00:09:28 - 00:09:29)

Yeah.

## Steve (00:09:29 - 00:10:28)

This is dialed in. It was super easy for guys to pull up history. The guy was there yesterday. It was in there. It was easy to decipher the quoting that they offer too. That demo was a big. We. We do word docs right now currently for quotes. Yeah, pain in the butt. I gotta get the address and type everything in. Where. This is a quick transfer, right. The work order create all that information pops up. I can put canned stuff in there so that my girls who don't know anything about a compressor or contactor can click that and auto populate the scope the same time. And then a dashboard of tracking your quotes, your percentage closed. We never had that before. So when we're slow, instead of me going like I have a messy file here of papers.

## Moderator (00:10:28 - 00:10:29)

Yeah.

## Steve (00:10:31 - 00:11:32)

I have a dashboard. I can look and see everything that's sitting out there. Open close percentages and you know, like I said, it was a. That was super helpful. So Service Titan, Sampro, Sage and Field Connect were the competitors that we, we liked coming out of the R show. So the ones we Field Connect was the other leading candidate. And Sam Pro was good. At my old company, we used it, but their pricing was super crazy. They. It was like a huge upfront cost where you could never leave it. It's probably why we never left it. At my old company. You invest so much money up front and if there's problems, you're just. You're stuck with it. It felt like, yeah.

## Moderator (00:11:32 - 00:11:37)

So what did Field Connect do so well that they earned a spot alongside service trade.

## Steve (00:11:39 - 00:12:36)

Comparable product? To be honest with you, the demo was Service Titan was way too much in residential based. Right. I don't want my text quoting stuff. We're not going into homes, we're going into data centers. Wrong product didn't really fit us. Powerful product, just not us. Sam Pro was. Could do a ton. Very powerful just for our size company. And what we were doing didn't make sense. I'm not gonna come up with $150,000 year one and then after that it's $20,000 a year and a. I'm like, you're gonna lock me in for. You know what I mean? So yeah, it was kind of a. They were running a lousy sales pitch.

## Moderator (00:12:37 - 00:12:37)

Yeah.

## Steve (00:12:37 - 00:13:28)

Yeah. Very powerful product. We worked in IT before and then Sage was lost. They didn't know what the heck they even had. They were. It was embarrassing. That was the five people that couldn't answer a single question. So yeah, Field Connect, I don't remember like this has happened a while ago when we dove into the weeds of the product and seeing how the integration was with Spectrum because we're staying on Spectrum for accounting, that was really important to us to make sure that our accounting and our service software talk fluently. So we ran demos with them. They showed Us it just felt. It kind of felt like a better version than what we were using a little bit. Right.

## Moderator (00:13:28 - 00:13:28)

Sure.

## Steve (00:13:28 - 00:14:05)

You'll like they were leaps and bounds ahead of the time. Service trade. You could tell they were investing into it. Right. They're coming up with new things. Hey, we're rolling this out too. This is coming. We're coming up with a new dashboard and a new scheduling platform. Like just a lot of came across a lot better. To me I never heard of going to the show was just another booth. I stopped by there to have something. So we didn't really know but pretty happy with what we were getting. We haven't been onboarded yet so I'm not used but no.

## Moderator (00:14:05 - 00:14:14)

This is useful though when you're trying to make the decision. Did you see it as a cost center or a way to drive revenue?

## Steve (00:14:15 - 00:14:35)

Drive revenue. I wanted this to. So we're a manufacturer rep. We represent a line called Verta. We have to do a ton of paperwork. My guys have to do a ton of paperwork. So speeding up that time of getting them in front of units instead of sitting behind a laptop in their trucks typing.

## Moderator (00:14:35 - 00:14:36)

Yeah.

## Steve (00:14:36 - 00:15:32)

Was really important. Some of our other but we're considered. It's called the LBO office. We have a territory for verdict in Michigan. The guys in Atlanta and the guys in Kentucky already use service trade. So I reached out to our peer group and said hey, does anyone know service trade? Anyone using them? Two people, rave reviews. So we set up demos with them too. I was like, hey, calling in a favor. Just give me an hour. Your time. Teams meeting. Show me how you use it. Nothing but rave reviews and the feedback from the team when they had a problem or they want to customize something, they've worked with them. Right. So that was really gave my team peace because that being oversold and under delivered feeling at the end of the day, I didn't know Danny from Adam. I just knew he was a nice guy and seemed like following through. But getting that feedback kind of helps solidify it for me a little bit.

## Moderator (00:15:33 - 00:15:44)

Did you have to do the work of finding out your team at you service trade or was that something that they prompted you with like hey, you should just so you know, your team's using this as well.

## Steve (00:15:44 - 00:15:45)

Say that again.

## Moderator (00:15:45 - 00:15:57)

You mentioned that somebody in a peer group office that you trusted peer group. Was that something that they prompted and service rate offered. It's like, hey, check out. There's different people. You talk to her?

## Steve (00:15:57 - 00:16:32)

No, I. I get put on calls every six months with the pier and I Reached out to the guy that heads it up and said, hey, can you find out who everyone's using service software wise and give us some feedback quick? Right. Do you like it? You happy with it? Yeah. Change and service trade popped. Two people used it that I knew and I'm like, oh wow. I didn't even know they used it. So that kind of triggered the conversation for me to go ask those guys.

## Moderator (00:16:33 - 00:16:36)

Is this an official peer group or.

## Steve (00:16:37 - 00:16:49)

Yeah, I mean, yeah, they, they hired a guy to run it that's like his full time gig. He oversees 30 some offices across the country.

## Moderator (00:16:49 - 00:16:54)

Yeah. So what's the name of that program called?

## Steve (00:16:54 - 00:17:22)

Pier 10. I, I shared it with Danny because I told Danny like there's some opportunity for you across the country. So I gave him my list that I have. So I'm like, if you need help anywhere, I'll help you. So awesome. Yeah, I, I told Danny once the service gets really stood up in this group might be kind of cool. Maybe you. Some people from can come in and one of our meetings and yeah. Talk and show.

## Moderator (00:17:22 - 00:17:32)

So awesome. You mentioned the importance of integration to Spectrum as your accounting software. Were there any other integrations that were important to you?

## Steve (00:17:34 - 00:17:56)

That was the big one for us as far as integration goes. I mean we're going to import all of our data over and they were super. Been super helpful with that. We're going through that process right now. I just part of doing this is time. The most valuable thing we have is time and what we can do in our window throughout our day. Right.

## Moderator (00:17:56 - 00:17:58)

Yeah, it's.

## Steve (00:17:59 - 00:18:27)

God and family are up here for me. Works down here. Right. So if I can get out of work earlier and speed things up for my guys and make this more efficient, that's super, super important. So getting that, seeing the time savings, I mean we're not living it yet and I know there's going to be some bumps along the way. I'm, I'm a realist, but that was really important. I don't want to do double work. I don't want to do double entry. I don't want to have.

## Moderator (00:18:27 - 00:18:28)

Yeah.

## Steve (00:18:31 - 00:18:42)

Those are huge because most companies don't think of. They'll go, hey, we're using Sage accounting software. Well, I gotta have something that bolts up to Sage.

## Moderator (00:18:43 - 00:18:43)

Yep.

## Steve (00:18:43 - 00:19:03)

I'm stuck. And Spectrum is not a leader in my opinion. But for some reason they love it in my office. So I was very, very thankful that they were able to own that integration and we can work directly with them and not a third party.

## Moderator (00:19:03 - 00:19:12)

So yeah, switching Topics a little bit. Is your business privately owned? Is it owned by. If investors?

## Steve (00:19:12 - 00:19:13)

Privately owned?

## Moderator (00:19:15 - 00:19:23)

Who is. Is there anybody else involved in, like, driving this decision and approving this decision? Just curious of like, the. All the stakeholders involved.

## Steve (00:19:24 - 00:19:35)

I. Not really. I mean, so when I came here, we were a service wasn't really a forefront thing.

## Moderator (00:19:35 - 00:19:35)

Yeah.

## Steve (00:19:35 - 00:20:01)

I'm a service guy. So I came here, I said, I'm gonna blow the light off this thing. We're gonna go. And one of the things that it slowed us down drastically is the service software. So he was fully on board of Go get it. I trust you. Whatever you want to get, go get it. Yeah. Keep me in the loop. Along the way, he didn't care if it was 20 grand or 100 grand, to be honest with you. It was just go find it.

## Moderator (00:20:01 - 00:20:01)

Yeah.

## Steve (00:20:02 - 00:20:27)

So that's why we went to ahr. That's why we entered. You know, we did five demos and I did this, and I have a really good support. Our owner is. He's my age, super nice guy, family man, really cares about people. So this was. He knows nothing about service trade except that it's coming. He doesn't really care. He's like, see, that's your world, not mine.

## Moderator (00:20:27 - 00:20:28)

Yeah.

## Steve (00:20:28 - 00:20:29)

But very supportive.

## Moderator (00:20:30 - 00:20:30)

That's good.

## Steve (00:20:30 - 00:20:31)

So.

## Moderator (00:20:34 - 00:20:55)

A big goal of this is to help service trade continue to improve. And so I do want to touch on whether it was in the product or in the sales process. What weaknesses did you perceive, even if they were overcome or concerns did you have that they could learn about and perhaps work on perception or reality of.

## Steve (00:20:56 - 00:21:40)

I think the thing that. And I don't know if it was a weakness or not. I don't. It wasn't a weakness. I think it was probably weakness of others that made them stand out. Was the demo. Right. That's your first time in front of us. I have my team in there, and you have to impress us and show us and be able to answer questions. They did a really good job in the. I don't know. It's probably like an hour demo to start. It set the hook. Right. We came back with all these. That was. That demo stood out drastically to us. And we were all shocked because we thought this was just a. All right, this is going to be a throwaway one.

## Moderator (00:21:40 - 00:21:41)

This is.

## Steve (00:21:41 - 00:24:02)

And it turned out to be the best. We were all kind of shocked. We thought one of like service titan or Sam Pro or Sage, especially some of the big boys. We're gonna blow our socks off. And service trade did it. So I think that looking back And I know There's a probably 15 dannies or 25 dannies across the country doing this for different markets, but he knew the product that was super helpful. He's competent enough to answer questions. It wasn't just the sales guy telling me, oh yeah, yeah, it's all gonna work. It's gonna work. He was showing us what it could do and what it couldn't do. And yeah, so far with the onboarding we pushed ours out, we made the decision and then we waited till the first of the years and we're rolling it out. Not kind of what. I don't really have any complaints yet. Yeah, pretty, pretty sticking to their word of timelines. We have a call with them tomorrow to kick off expectations and where we're going and what we're doing. And my IT guys is going to be working with them for integration coming up here real soon. So I'm. I'm guessing they don't have a bunch of Danny's there, so having. You know what I mean? But the first moments, in my opinion, we had them lined up back to back pretty much. So that's great. I mean, sure that that would be my suggestion is your first touch has to be really good because we disqualified a bunch from just bad. Like the sage was so bad. We were like, this is embarrassing. We almost stopped it. Like, ah, you know what, we're 20 minutes into it because they had no idea I would pass that along for them to stay on it, make sure everyone does it that way, the way Danny did it. That would be my biggest piece of advice is that was what probably made the difference of giving us what we wanted to see. I didn't, I didn't care. Just it was another sales pitch. But it was good, right? It worked. It wasn't of course either, you know, they were showing us so great.

## Moderator (00:24:02 - 00:24:14)

Well, it's really useful feedback. I believe they record their sales calls for training purposes and so I could probably find that call as a model for the team to say, this is what, what good looks like. Yeah.

## Steve (00:24:14 - 00:24:53)

Like I said for us and I. Knowing your competitors, knowing what they're doing and what they're not doing, it's always intriguing. That's part of the peer group we're in. They're really not our competitors, but they do the same thing we do in a different territory. So we share what's working, what's not, what's our rates, what are we charging, what's working. But these other guys have a great big shiny box and huge, huge booths and all this Fancy stuff at the HR show. And you think, oh my gosh, this.

## Moderator (00:24:53 - 00:24:54)

Is the big boy.

## Steve (00:24:54 - 00:24:59)

This is the. And the product stump. It was like a. Yeah. Shiny box. Right.

## Moderator (00:25:00 - 00:25:25)

But that let me. We have a couple minutes. I just want to maybe finish there. You have this perception. The other guys were. Were bigger. I knew you had never heard of service trade before. Sounds like you maybe had heard a couple of. Of a couple of them before. And the booths gave them the appearance of being kind of established players or bigger. Bigger players. How would you heard of them before? Was it just through referrals or just being in the space?

## Steve (00:25:27 - 00:25:44)

Advertising, marketing. I was. When I'd go on and start searching service softwares, service trade always pops up. Or I'm sorry, service titan Sam Pro I used to work with. So we had a little history there. We had some comfort level there. Sage is a big one.

## Moderator (00:25:44 - 00:25:45)

Yeah.

## Steve (00:25:45 - 00:25:53)

They don't do their own. They bought somebody else's line and bolted it up and called it their own.

## Moderator (00:25:53 - 00:25:58)

But how about Field Connect? How did you find them through online?

## Steve (00:25:59 - 00:26:52)

Like I said, we. Before we went to go look at the booths, we started doing history before we went up there, went and googled all these places. Who are they? What are their offerings? What do they look like? Service Tree wasn't the shiniest by any means. Yeah, but we're selfish people. We don't need Shiny Flash. We just need it to work. We need support. So it was, I think getting the name out there a little bit more. Because when I go on to kind of search, I was in the middle of the night searching, what can we go to? What does it bolt up to? I didn't know it bolted up to Spectrum. Right. I was checking, trying to find integrations to Spectrum. I didn't know that. So that was when we went out there and asked that. That was one of the first questions we asked every booth we went to. If you don't bolt up the spectrum where you're disqualified immediately.

## Moderator (00:26:52 - 00:26:53)

Yeah.

## Steve (00:26:53 - 00:27:12)

Going to their website. I don't remember off the top of my head that it bolted up. And that's just me, right? Yeah. I don't know what other people use, but that was, you know, maybe they're marketing a little bit. Look at getting their name out there. Especially people. Everyone.

## Moderator (00:27:12 - 00:27:12)

Yeah.

## Steve (00:27:12 - 00:27:25)

Google Search. Right. That might be something to show more if you go on and know your competitors. I don't know. Yeah, that's great.

## Moderator (00:27:25 - 00:27:27)

Steve, thank you so much for your time. I really appreciate it.

## Steve (00:27:27 - 00:27:28)

Absolutely.

## Moderator (00:27:28 - 00:27:29)

Have a great day.

## Steve (00:27:29 - 00:27:30)

You too. Bye.