Date: 1.31.25

Name: Chris Stewart

Stage: Closed Lost

Company Size: Emerging

Number of Techs: 2

Job Title / Level: Owner and President

Speaker 1: Hi, good morning. How are you?

Speaker 2: Hi Chris, how are you?

Speaker 1: I'm doing well, thank you.

Speaker 2: Thanks for taking time today.

Speaker 1: No problem at all. No problem.

Speaker 2: Great. Well, let me give you a little context before we start. My name is Drew Oli. I run a research firm. We do win-loss and competitive intelligence, and I get the pleasure of meeting people for a living and service trades hired me like many of my other clients to find out how to better serve their clients and to earn the business of new prospects. And so this is a casual conversation. I'll walk you through a set of questions. Hopefully it's an easy start to the Friday and we record it with your permission so I can use the transcripts to develop an overarching report. We're probably doing 30 to 40 interviews for service trade. So first just want to ask, is it okay with you if we record?

Speaker 1: Yeah, no, absolutely. Please do.

Speaker 2: Great. Thank you so much. And any questions before we get started?

Speaker 1: No, please carry on.

Speaker 2: Awesome. Okay. Well Chris, if you don't mind starting by just setting the context for me, introducing yourself, your company, and then your role at the company.

Speaker 1: Okay. My name is Chris Stewart. I'm the owner and president at CMC Quality Assurance.

Speaker 2: That's good. That's all you need to start. How many technicians does your company currently employ?

Speaker 1: I've got two guys.

Speaker 2: Great. And what percentage of your business is dedicated to projects versus service contracts?

Speaker 1: I would say 95% service.

Speaker 2: Got it. And do you have the same tax work? Both. I know it's 95%, but So when you do projects with the same techs,

Speaker 1: Yeah, it's the same guys. Yeah.

Speaker 2: Got it. Well, great. I would love to hear, when did you first hear about service trade?

Speaker 1: Okay, drew. So my previous employer had service trade.

Speaker 2: Got it.

Speaker 1: And they knew nothing about it and I quickly had to become an expert in it, so I found out there was a lot of things that weren't opened up, so I got administrator rights and I opened everything all up and I started working with it and it was working like a dream. So when I left and started my own business, I reached out and I was told, I'm sorry, we can't support you. We're only dealing with Sage clients. And I was just like, pardon? I deal with, I know Jessica, blah, blah, blah. And I've even helped them with advice and information to try and help them develop their product to be more service friendly on the HVAC side of it and giving them things that I know other contractors would appreciate.

Speaker 2: Yeah. Well, two things before we continue. One, congratulations on starting your own business. I can relate in the good and the bad of that. Two. Sorry for sounds like a not positive experience.

Speaker 1: No, it was not a positive experience at all. I was very, very upset and I was angry because it's all over their website that they support QuickBooks and they integrate into QuickBooks and it was, I can't believe that they would not want it. QuickBooks is, everybody uses QuickBooks. Yes, the big companies use the big use Sage because it's an accounting driven program, but at the end of the day, I was really disappointed that they're going to take all these contractors and say they're not going to service them even if there are existing QuickBooks clients. Like

Speaker 2: Yeah. Would you help me just walk me through the rest of the story After that interaction, what happened from there? Did you end up any more interactions with Service trade? Did you end up finding another provider? Where are you at? Oh

Speaker 1: Yeah. Yeah. I went to Field Edge, so I've worked with Field Edge in the past. However, I was intimately familiar with service trade because I just left service trade, I was there, I knew things that even service trade people didn't know. I'm sure. So that's how much I was involved in it and when I here take my money, please take my money. And they didn't want to support QuickBooks even though it's on their website.

Speaker 2: Okay. That's really good to know. For what it's worth, the executive team, including the CEO, head of revenue reads my reports and I have conversations with, and so I can bring this directly to them and just let them know what happened. I would love

Speaker 1: To know, please do because the program is fantastic. I love the program. I absolutely want to use it, but now I've invested all my time and energy setting up this service software program and I'm not about to change now, but as a potential client, if I was anybody else reaching out because I saw their service on the website and I wanted to have them get some more information or what have you, and then being told that it doesn't support QuickBooks, the biggest software accounting program that's out there for everybody. So I

Speaker 2: Don't know. Okay. Well, what I'd love to use the rest of the time, I will definitely communicate that, but I would love to use the rest of the time to do is to learn about some of the strengths and weaknesses if we can put aside what happened, the things

Speaker 1: That No, no, I need to base it on my previous experience with it from my previous employer. I was really glad that I got this phone call so that I could actually speak to somebody who would actually hopefully hear what I'm saying and get to the appropriate people to, and I'm glad that the senior and executive people are going to be reviewing this

Speaker 2: Information. Yeah, absolutely.

Speaker 1: So now it's been a little while though, drew. Okay, so my feedback on it is I loved it. Okay. The strengths on it were way too many to tabulate and everything. The quoting, the service calls, the ability for the technicians to create a quote in the field and email it instantly to the office and putting in the dashboard the items. So when the work order was completed, I would get a notification, I would process it for billing and then it would be posted into the billing side of it so that they could send out the invoices. I had everything working seamlessly and set up and it was very well organized and I absolutely loved it.

Speaker 2: How big was this company that you were at? How many technicians?

Speaker 1: Total technicians including project side?

Speaker 2: Yeah,

Speaker 1: Like 50.

Speaker 2: Got it. Do you mind sharing the name?

Speaker 1: Yeah, it's CBS Certified Building Systems.

Speaker 2: Awesome. It sounds like it did a lot for you that you were thrilled with. If you had to just identify the top pain point that it solved for you where you said, man,

Speaker 1: One thing Drew tell me one thing and everything else, I could do a workaround or tweak things to work the way I wanted to, but you didn't have the maintenances I wanted to have and be able to set up the maintenance contracts in service trade, but you couldn't had to still do it through Sage and that was such a pain in the, you know what?

Speaker 2: Yeah, certainly. How about other the things it did do, if you had to take away all of the functionality but leave one or two things, what were the things that were most important out of what it did? Offer

Speaker 1: Technicians being able to provide all the details to quote something and it's instant, it gets delivered to the office immediately.

Speaker 1: That's a huge challenge, especially Rocket Market when we had to do paperwork orders and you only handed them in once a week, so you got a client, unless it was an emergency, you couldn't jump on it and people have a short memory span and unless you get it to them within 48 hours, they're already onto the next thing. That's not a priority for them now. So we were doing really well with the quote conversion and turnover to the client from the time the guy was on site, it would be 24 48 hours max before my office team was able to send out quotes. So it got right in front of the customer. They were able to process it right away, get approvals, went way up way fast.

Speaker 2: Yeah. Well great. How about you tell me more about the maintenance. What did you need to get done and what would you hope service trade could accomplish?

Speaker 1: They weren't able to set up maintenance contracts in service trade. That was the only thing left for it to take out of Sage and that could not happen for some reason. Apparently Sage has got it so integrated and whatever that service trade was not able to bring that over. So I was waiting for, I was hoping that that was going to happen, but to go through and do it all and yeah, other than some minor bugs and stuff like that, everything else was really good. So

Speaker 2: Yeah. You use currently using a new system given what happened, can you use that experience and you sound like you have just a huge depth of experience to compare and contrast. What could servicer learn from your new provider? Things they do well, perhaps better or just to be aware of things they might do better than this new vendor you use?

Speaker 1: To be honest with you, I got to tell you Drew, that the two of them are pretty close to each other.

Speaker 1: They offer all the very similar types. They may do things just a little differently, but the way that they work things is very on par with exactly what it is. However, the way they do their work orders in here for maintenance is they want, it tries to do it on a different basis, whereas a service trade, your work order for all these pieces of equipment come up. I had tasking set up for them so that when you've got all these inspections that you want and you have different equipment that's being serviced during different months, you could set up all those items to be tracked and histories and post to that month. So when the work order gets generated, it's by piece of equipment and there's the checklist that has to be completed through it all. So the only thing is when the work order printed it out, the description showed the description of every single one of the tasks and it looked really, really horrible. But some of the work orders were coming through like 20, 30 pages just because of the checklists and that's fine for me. I don't have an issue with that. The client wants these checklists and they want to see that the technician went to boiler model serial number and they checked all the items. Perfect, no problem. Here you go. Now it's electronic, right? It gets submitted. You just put that into your file and if you want to review it, it's all good.

Speaker 1: And it really kind of forces the technicians to jog their memory of what they should be doing when they're doing their service.

Speaker 2: Sure, okay. The heart of this conversation started out around Sage and QuickBooks. Can you talk to me about any of the other, what integrations really mattered to you?

Speaker 1: Well, the one item that I really enjoy that QuickBooks has, but again we're looking into the accounting portion of it, the work orders, print, like work orders, priced work orders either way, whether it's through service trade or through sage, which is something I liked. It doesn't happen that way for QuickBooks. And I would say that's probably the one thing I can't get QuickBooks to do. So unfortunately that's just a problem I got to deal with.

Speaker 3: Yeah,

Speaker 2: Okay. It's interesting. It sounds like this new vendor pretty on par with service trade in terms of capabilities. If you had to, let's imagine the experiences removed and you had to recommend one or the other.

Speaker 1: No, I handicap servicer all day every day.

Speaker 2: How come though? It sounds like you had an amazing experience with them, but now that these capabilities are near identical, why do you say that?

Speaker 1: Technical support was a big thing that was always available. There was knowledgeable people and the way it is just that I was so in depth with the program that I knew every single piece of its capabilities to do. So being able to switch to clock it and clock out features and paying certain items a certain way and processing. So one of the things that I really, really like that I can't do with my program is when you're pricing the work orders out, you could specify the matrix. Okay, perfect. Cost matrix sale. Excellent. Sounds like a no brainer. I've got a matrix in my program. I've got all my, but see, the thing is is that service companies, if they are inventory driven, they're more along the lines of residential people. Commercial people can't do inventory. The suppliers are where the inventory is. We keep small parts and items that are everyday kind of things and I can't keep a fan motor on my truck because I deal with every single manufacturer that's out there and there's to use that motor for that specific part.

Speaker 1: So when drafting the invoices up, it was real easy. You just went through, you already had all your items in there, your costing for each of your technicians, and then you just put the costs in for the materials. Actually, one of the good things was is that they were able to do the pos. I got the guys to actually, I was able to eliminate office stuff because I got the guys to do all the purchase orders on their phones so they could go to the counter. They were complaining about, oh, we've got to call in. We got to wait for this person, and when they're in the bathroom, this, that it's holding them up and costing time and time is money. So when the guys were able to do the purchase orders up, they were able to write the parts that they bought and the cost of it, which transferred automatically. So it was real easy. So when it came over, it just hit the matrix that was designed for that client and boom, I just had to do a quick review, make sure everything looked good, my profit was where it was supposed to be, and then get sent to billing to be sent out. That was the greatest feature. I can't do that with this. This is more of an inventory driven system where you have to specify and then it will do its own markup on that, not on a general basis.

Speaker 2: Sure. Well, let's imagine we're a year from now and you are using service trade again. What's happened between now and then that's allowed service trade to earn your business back despite your investment and time in this new system?

Speaker 1: Well, so to be frank and completely honest and upfront here, one, I want to see how it would work with QuickBooks.

Speaker 3: Yeah,

Speaker 1: I would need to know how that works. Two, I would gladly take it if they want to compensate me for free service for a period of time, and that would be it really, because of all the time and money and energy that I put into there, I'm going to have to do the exact same thing with service trade. So if they were to want me to come back, I would want something substantial for me to come back. I don't want to be compensated financially, I just want to be compensated with service in lieu of, so,

Speaker 2: Yeah, no, that's useful to hear. Thank you for sharing. The first thing you said when I asked about what made you feel like Servicer was the one you recommended was the, I think technical team, the team you engaged with while you were there, what did that look like? You said you shared, there's a lot of back and forth, they supported you, you providing them feedback. Was there just a couple individuals you were in weekly contact with or if you just explain that a little bit deeper?

Speaker 1: Yeah, it was Jessica and Dana. I would like that put in your report because those two ladies, fantastic. Drew, amazing professional, were very knowledgeable if they didn't know they got on the ball to get me a resolution with somebody. Actually, there's another Jessica that was deals with other items and they brought her in and not that they were major things, drew, they were just some minor things that needed to be dealt with or corrected or I did a transition of how the work orders were being handled because before they were being handled by Sage and I got them switched over to handled by service trade because it's the heartbeat of everything. I only basically want to deal with one software program and push it to all the money people, put the numbers over it to the money people and let them deal with it from there. So the fact that there's the invoice goes out, it's detailed, it's got all the information on it and goes out, but the technical team that's behind there providing the customer support is bar none the hands down really, really good.

Speaker 2: Awesome. I think they'll be happy to hear that. Now, you spent so much time both with servicer getting it set up for your last company and this new vendor. Can you talk to me about the implementation process and the onboarding things you've learned that were great experiences and things that Servicer could learn from to improve?

Speaker 1: You know what that I got to tell you, field Edge, they are on the ball with their onboarding process. They are extremely detailed in what they do. They're organized, they take all your information, they roll it in, they give you a couple of days to look at the system to make sure there's integrated correctly and the way you want it. And then every single day for a whole week, I had a meeting with my account rep to make sure and answer any questions that I needed and just silly things. Now, the one thing is is that I have a history of working with that program and just I'm old, so you're a little foggy on some of the things I forgot. But other than that, the one thing actually that they do have that's actually quite nice is for their tech support is they've got a chat thing. You can just log in, you can just click on the help button and just request a chat and less than two minutes somebody's there helping you.

Speaker 2: Got it.

Speaker 1: So they'll go in behind and look at your account and fix something that needs to be fixed or this didn't get set up quite the way it's supposed to so that this works and so on and so forth. So

Speaker 2: Yeah, awesome. But if I'd not asked

Speaker 1: About the onboarding portion of service trade, I wasn't around for when all of this rolled out. Originally. I came in after the fact and nobody drew nobody. They used the dispatch board. That's all they used. Everything else was being dealt with through Sage. They were doing paper, not paper, well, it was pretty much paper. They were doing a Word document for the quote and they were doing an Excel spreadsheets and all that stuff. And I'm like, what? This is, this is not 1998 anymore. Let's move forward here. And then I got everybody switched over to, Hey, let's get the technicians to put all the information in, upload all the photos, and then I developed a form that was a recommendation form that got attached automatically to the work order when the technician was finished and sent it out to the client. So they had a deficiency report and the work order instantaneously as soon as the technician finishes work order, and that also sent the email to the quote section and so on and so forth.

Speaker 2: Yeah. I think a key learning here is that even the company who bought it and used it just vastly under leveraged it, and maybe there's something to the onboarding itself and implementation that didn't get that company where it needed to. With service servicer, they would've seen more value. Luckily, they had you take it on.

Speaker 1: Yeah. The problem was too though, drew that the company I was with had a lot of high turnover, so the people would learn something and then they would leave. Right. So I'm pretty sure that they are back to, as far as my understanding is right now, from what I've been told, they've gone back to the old way where every morning or every night or something like that or whatever time they've set it up for, they print out all the work orders and somebody sits down and reads through, bless you, goes through all the work orders and reads them printing out wasting paper because it just gets thrown in the garbage after the fact into the recycle. It's a waste of paper and toner and money and somebody's time. Every morning when I got in, I could, through the front, the dashboard, I had two, I forget what they're called now, but you can only get them at the dashboard. But I had it set up so that anytime that the work orders closed out from the technician, it was ready for billing, it would come right. Like populate instantaneously every minute. It was refreshing. Same thing with the quotations. So it would just go through like that. I can't do that really with my system.

Speaker 2: Yeah. Well, Chris, thank you so much for your time today.

Speaker 1: No problem at all, drew. Thank you for taking the time to speak with me and listen to my concerns. I would love the opportunity to work with a service trade again, but again, I don't want to be investing a whole bunch of time and energy into something that I've already done. Right. So

Speaker 2: Understood. Yeah. Well, you have a great weekend. Thank you, Chris.

Speaker 1: Okay, thank you Drew. Take care.

Speaker 2: Bye

Speaker 1: Bye-Bye.

### Win/Loss Summary – CMC Quality Assurance (Client Review)

#### 1. \*\*Background Context\*\*

- \*\*Client Information\*\*: Chris Stewart, Owner and President of CMC Quality Assurance, operates a service-focused business with two technicians.

- \*\*Business Model\*\*: 95% of their work comprises service contracts, leveraging the same technicians for project work.

#### 2. \*\*Initial Interaction with ServiceTrade\*\*

- \*\*Previous Experience\*\*: Chris was previously employed at CBS Certified Building Systems, where he worked extensively with ServiceTrade. His direct involvement included becoming an expert in its capabilities.

- \*\*Quote\*\*: "I quickly had to become an expert in it... it was working like a dream."

- \*\*Transition to CMC Quality Assurance\*\*: Upon starting his own business, he attempted to continue using ServiceTrade but was met with an unexpected limitation.

- \*\*Quote\*\*: "I reached out and I was told, I'm sorry, we can't support you. We're only dealing with Sage clients."

- \*\*Disappointment with ServiceTrade\*\*: Chris expressed frustration over not being able to obtain support for QuickBooks, despite its mention on ServiceTrade's website.

- \*\*Quote\*\*: "I can't believe that they would not want it. QuickBooks is... the biggest software accounting program that's out there."

#### 3. \*\*Decision to Switch Providers\*\*

- \*\*Finding a New Provider\*\*: Due to the limited support from ServiceTrade, Chris opted for Field Edge, recounting a seamless transition based on his extensive background in service management software.

- \*\*Quote\*\*: "I went to Field Edge... I was intimately familiar with service trade."

#### 4. \*\*Key Strengths of ServiceTrade\*\*

- \*\*Functional Capabilities\*\*: Chris highlighted several strengths of ServiceTrade, particularly regarding the quoting process.

- \*\*Quote\*\*: "The technicians being able to provide all the details to quote something and it's instant, it gets delivered to the office immediately."

- \*\*Efficiency Improvements\*\*: The system provided timely processing from quote to client communication, enhancing conversion and client satisfaction.

- \*\*Quote\*\*: "The quote conversion and turnover to the client from the time the guy was on site would be 24-48 hours max."

#### 5. \*\*Areas for Improvement\*\*

- \*\*Maintenance Contracts\*\*: A significant pain point was the inability to manage maintenance contracts within ServiceTrade, necessitating integration with Sage.

- \*\*Quote\*\*: "They weren't able to set up maintenance contracts in ServiceTrade... had to still do it through Sage."

- \*\*Onboarding and Implementation\*\*: Although Chris did not directly participate in the initial deployment of ServiceTrade at CBS, his observations indicated that the previous company's high turnover impacted their effective use of the software. He provided valuable insights on the onboarding process and recommended that ServiceTrade learn from Field Edge's detailed and organized implementation approach.

- \*\*Quote\*\*: "Field Edge... they are extremely detailed in what they do."

#### 6. \*\*Comparative Advantage of Field Edge\*\*

- \*\*Technical Support and Community\*\*: Chris remarked that the technical support team at ServiceTrade was exceptional, indicating a comparative strength over Field Edge in some respects.

- \*\*Quote\*\*: "Technical support was a big thing that was always available... those two ladies, fantastic."

- \*\*User Engagement\*\*: Highlighted the ease of communication and responsiveness during his experience with ServiceTrade.

- \*\*Quote\*\*: "If they didn't know they got on the ball to get me a resolution with somebody."

#### 7. \*\*Potential Redemption and Future Considerations\*\*

- \*\*Desire to Return to ServiceTrade\*\*: Despite a strong commitment to Field Edge, Chris noted he might consider ServiceTrade if certain conditions were met.

- \*\*Quote\*\*: "I would need to know how that works with QuickBooks... I would want something substantial for me to come back."

#### 8. \*\*Conclusion and Learnings\*\*

- \*\*Key Takeaways for ServiceTrade\*\*:

- \*\*Broaden Support for Accounting Solutions\*\*: Address the frustrations concerning QuickBooks support, which is a key software in the industry.

- \*\*Enhance Maintenance Management Features\*\*: Develop capability for maintenance contracts within the platform without reliance on third-party solutions.

- \*\*Consider Client Onboarding Experiences\*\*: Improve the onboarding process by ensuring thorough training and integration strategies to maximize user engagement and retention.

By addressing these areas, ServiceTrade could potentially win back clients like Chris and improve overall satisfaction of current users.