Date: 12.17.25

Name: Matt Rohan

Stage: Potential to win

Company Size: Corporate

Number of Techs: 20

Job Title / Level: Owner

Matt Cooling\_ ServiceTrade.mp4

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

It.

## Matt (00:00:29 - 00:00:30)

Hey, Drew, how's it going?

## Moderator (00:00:30 - 00:00:32)

Hey, man, how are you?

## Matt (00:00:32 - 00:00:34)

I'm doing fantastic. Awesome.

## Moderator (00:00:34 - 00:00:36)

Thanks for making the time today.

## Matt (00:00:36 - 00:00:40)

Sure. Yeah. Happy that, you know, we could maybe connect.

## Moderator (00:00:42 - 00:01:13)

Yeah. So the. Let me give you some context to make sure everything makes sense and see if you have any questions. The interview is being conducted to help us learn more about your experience evaluating service providers, evaluating service trade, and with your permission, we'll record the conversation. We're having a ton of these conversations and we use it to create a report that's shared with service trade to help them better serve their customers, earn the business of new prospects. Does that work with you?

## Matt (00:01:13 - 00:01:14)

Yeah, it does.

## Moderator (00:01:15 - 00:01:21)

Awesome. Can you start by just introducing yourself and your company?

## Matt (00:01:21 - 00:01:53)

Right. So I'm Matt Rohman and basically, you know, I'm the owner of ehit and Co, which is an hvse. Yeah. And basically, you know, we, we evaluated service a little bit earlier, you know, for some of the, you know, workflows to be optimized. But, you know, we ended up, we actually didn't end up going on with the implementation just because of some internal reasons. But. Yeah.

## Moderator (00:01:54 - 00:01:57)

Did you end up going with any solution or just stopping?

## Matt (00:01:58 - 00:02:10)

We didn't. Yeah, we, I think, you know, with what we have internally, you know, we will be reevaluating early next year, Q1. So basically, yeah.

## Moderator (00:02:11 - 00:02:18)

Okay, great. And to get just a better sense of your company's size and scope, how many technicians do you have or employ?

## Matt (00:02:19 - 00:02:22)

Right. We have about 20 now.

## Moderator (00:02:22 - 00:02:24)

Okay, great. Congrats.

## Matt (00:02:25 - 00:02:26)

Yeah.

## Moderator (00:02:26 - 00:02:33)

What percentage of your business is dedicated to service contracts versus like construction projects?

## Matt (00:02:35 - 00:02:43)

I'd say we are more on the saddest, part, but, you know, we do, we do some, you know, some reconstruction as well.

## Moderator (00:02:44 - 00:02:52)

Is it, you say it's, you know, a quarter of them, 25% of construction and the rest are service or is it even more service?

## Matt (00:02:53 - 00:02:56)

Yeah, maybe 70, 30%. So.

## Moderator (00:02:56 - 00:03:25)

Got it. Cool. Well, what motivated you to start looking for a field service management tool? What, what? Did anything happen in particular? What. And what were you hoping it would accomplish? Sorry, what. What caused you to start looking, to even start evaluating vendors? Does something happen internally or does it motivate you to find a tool that. To help you?

## Matt (00:03:26 - 00:04:19)

Sure. And basically, you know, before, before statistrate evaluation, we, you know, we. The processes were pretty manual, paper based systems. You know, the work orders, some job notes and some of the logs were just maintained on paper. And that is what we do right now. Still, you know, the schedule, scheduling was pretty manual, you know, on like calendars and spreadsheets. As well. The communication really, you know, we wanted some real time visibility into the job progress, you know, and just being able to offer technicians in a way to update and you know, just be able to communicate with the, the customers. So yeah, I mean that's, that's basically some of the things that made us to look into service trade.

## Moderator (00:04:19 - 00:04:36)

But yeah, and you kind of mentioned them already. But go one step deeper. I was to ask you what criteria were most important to you in order, what were the things that as you start to look at service trade and potential other vendors were critical to your decision?

## Matt (00:04:40 - 00:05:01)

I mean, yeah, basically we wanted to just be able to improve customer experience of really streamline the operations and make the technicians lives better. So anything that could do that, you know, optimize, you know, be able to optimize these workflows, that was the main, you know, what we wanted to see.

## Moderator (00:05:02 - 00:05:20)

Yeah. Did you see it as a tool to help you like manage your costs and efficiency or did you see it as an opportunity to like increase revenue through the customer experience? I'm curious. Foster revenue?

## Matt (00:05:20 - 00:05:33)

Yeah, I mean both. But I'd say, you know, at the end of the day just able to improve the revenue with being able to announce this customer satisfaction and trust. So yeah, I mean, all in all, the revenue was the main goal.

## Moderator (00:05:34 - 00:05:56)

Got it. And I know that some vendors are more specialized and others offer a broader set of services from construction projects to service management. You said you, you use some of both. Were you looking for a vendor to manage both of those? Are there, are there any other capabilities you wanted them to have?

## Matt (00:05:58 - 00:05:58)

I mean, both.

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

Yeah, yeah. Was what other vendors did you look at besides service trade?

## Matt (00:06:12 - 00:06:31)

I mean, but they were not specifically just, you know, directly, you know, they didn't offer the same services. But we look into several scheduling tools. Yeah, just a couple, you know, we looked at satisfaction and weave as well.

## Moderator (00:06:31 - 00:06:50)

Got it and did. Were there, are there any integrations that you need them to have like maybe into your, your accounting software, costing your ERP and any tools you wanted to make sure that service trade could connect into?

## Matt (00:06:51 - 00:06:59)

Sure. You wanted to see the connection to QuickBooks, basically that was the main one. But other people. Yeah.

## Moderator (00:07:01 - 00:07:12)

Now you're the owner. Was there anybody else involved in evaluating, making the decision on your team? Whether it's. Yeah, somebody at the company or someone outside the company?

## Matt (00:07:12 - 00:07:24)

Yeah, I had a couple team members internally that helped with, you know, evaluation, but I was the, you know, the sole decision maker.

## Moderator (00:07:25 - 00:07:28)

Got it. And what were their roles at the company?

## Matt (00:07:32 - 00:07:39)

Yeah, so we had somebody from billing and as well, we had another co owner. So.

## Moderator (00:07:39 - 00:07:51)

Yeah, got it. And do you. Only as who you're comfortable with, but do you own the company yourself or is there any other like outside investors or private equity firms involved?

## Matt (00:07:51 - 00:07:52)

Not really. Not really.

## Moderator (00:07:53 - 00:08:15)

Got it. Well, you mentioned that you compared service trade to some scheduling tools and then obviously your own existing process. What did you see? Us both strengths and weaknesses. But to start with strengths, what did you see the strengths and service trades offering compared to the scheduling tools?

## Matt (00:08:17 - 00:08:55)

Right. I mean, so you know, as far as the, the industry that we are in, you know, we, we really pull up the, you know, automate these maintenance schedules, you know, send reminders to customers as well. And there was just insights into data. So you know, that's one thing. Also just the analytics on a job performance that, that we saw there and the integration, you know, with accounting, inventory and CRM. So yeah, those are some of the strengths.

## Moderator (00:08:56 - 00:09:00)

Yeah. Were there any concerns or weaknesses that service trade had?

## Matt (00:09:01 - 00:09:10)

I mean, I wouldn't say any, but you know, I wouldn't say any really. Just as far as the evaluation went.

## Moderator (00:09:11 - 00:09:30)

Sure. Now you mentioned you end up because of some internal reasons not moving ahead right now at least and you're going to reopen it in Q1 as much as you're comfortable. Could you share if what, what kind of caused the deal to stop and not move ahead?

## Matt (00:09:31 - 00:09:45)

I mean. Yeah, so with the budget and there was just a lot going on, you know, we were doing a lot of scaling. So yeah, we thought maybe once we are done with expanding the business, we can definitely bring in these other tools.

## Moderator (00:09:47 - 00:09:51)

Was the budget different than you expected, like the cost of the tool?

## Matt (00:09:52 - 00:10:05)

I mean it was fair, but we are, you know, we really had to. I mean it was a matter of like priority or you know, what we wanted in place first.

## Moderator (00:10:06 - 00:10:17)

Sure. Was that was cost the biggest delay or. You said there's other stuff going on as well. It just didn't take priority. What was the number one reason that it got pushed?

## Matt (00:10:18 - 00:10:39)

I mean priorities with, you know, what we, we had been planning for a while, so we wanted to scale a bit and then. Yeah, so I'd say the priorities. But if we would have got it for more cheaper, I'd say we might have moved forward. But I mean it wasn't the biggest. What, what made us not to go ahead?

## Moderator (00:10:40 - 00:10:47)

Sure. How much cheaper would it have needed to be in order for you to decide to move ahead? You any numbers in mind?

## Matt (00:10:48 - 00:10:55)

Not really. Not really, but I think it's, it's a Pretty fair price considering what we will be getting. So yeah, sure.

## Moderator (00:10:56 - 00:11:10)

When you re evaluate or relook at vendors in Q1, what how likely is service trade to be considered and when.

## Matt (00:11:10 - 00:11:29)

Your business, I mean totally, you know it's totally top of the the list of what we will be looking into again. So yeah, I mean we definitely saw the value. We were confident with what we will be getting. So yeah, totally. Something we are looking more than the books.

## Moderator (00:11:30 - 00:11:44)

Is there anything that you would like to learn more about from them? Questions you had or things besides the price that would give you greater confidence in moving ahead with service trade now with the United.

## Matt (00:11:44 - 00:11:59)

I mean just from the demonstration that we had in my perfect sense so but I mean we really wanted to get be you know, have a feel of the platform ourselves be hands on but I think he probably made a lot of sense.

## Moderator (00:11:59 - 00:12:12)

Okay, great. I'd love to ask a few questions about the sales team if you don't mind. What was your experience like what do you think the sales team did? Well when you spoke with them?

## Matt (00:12:17 - 00:12:20)

Yeah, I believe they were so resourceful.

## Moderator (00:12:23 - 00:12:30)

You found them to be resourceful. Did they they help you, you know, become educated on what some of the options were?

## Matt (00:12:30 - 00:12:32)

Absolutely, yeah.

## Moderator (00:12:33 - 00:12:42)

Did you find that the. The pitch was catered to you in your business or did it feel generic?

## Matt (00:12:43 - 00:12:53)

I mean totally get it for us and the year, you know they tried to customize it to. To to like the use cases that we had in mind. So yeah, it was a good work.

## Moderator (00:12:54 - 00:13:02)

Nice. Is there anything that they could have done better to engage with you and help you figure out the right solution for you?

## Matt (00:13:02 - 00:13:07)

I mean I wouldn't think of anything else apart from what they did, just to be honest.

## Moderator (00:13:07 - 00:13:16)

Okay. Yeah, sounds good. Was there anything. Well, how did you find out about service trade in the first place?

## Matt (00:13:17 - 00:13:37)

I mean just from you know our digging into, you know we were looking for the use cases that we had in mind. You know we stumbled upon what you guys do and yeah, I mean we thought it might be why suit get a deeper understanding, have a blueprint and yeah, we requested a demo.

## Moderator (00:13:38 - 00:13:51)

Sure. When you say you stumbled upon them, was it do you think just in. In searching on Google where there's a conference that you went to or a certain just great publication you read?

## Matt (00:13:51 - 00:13:52)

Just Google with the use cases that.

## Moderator (00:13:52 - 00:13:59)

We had and what exit what do you remember kind of what are the use cases that you typed in that you're looking to solve for.

## Matt (00:14:01 - 00:14:09)

People looking for you know, a job scheduling and dispatching tool and as well communication tool with customers and.

## Moderator (00:14:09 - 00:14:24)

Yeah, yeah, awesome. What was surprising to you about service trade after hearing their pitch and demo compared to what you originally thought? Did you like learn anything new about their business that was different than the original perception?

## Matt (00:14:25 - 00:14:49)

I mean, just as far as what we expected them to do. That was. That was it. You know, I checked the boxes. But I mean, we will learn some other few capabilities that we, you know, initially didn't consider. Richard, thank you. It was pretty good. But as far as the expectation, it totally met what we had in mind.

## Moderator (00:14:49 - 00:14:53)

What capabilities did you learn about that you weren't perhaps aware of before?

## Matt (00:14:54 - 00:14:56)

I'd say mainly just the integrations.

## Moderator (00:14:59 - 00:15:30)

Got it. Yeah, that makes sense. Did you. Can you tell me about. Do you use any other tools today like any other Software? You mentioned QuickBooks. So we just love to learn about all the other tools and like workflow of. Of someone like yourself so they could better improve the integrations and partnerships that they find. So yeah. What other software tools do you use today to help you do your job right?

## Matt (00:15:30 - 00:15:46)

I mean, basically what we have are just basic tools. You know, we rely on like calendars, you know, slack for our communication, spreadsheets for mostly everything. But yeah, that should be about it.

## Moderator (00:15:46 - 00:15:56)

Yeah, got it. Now you mentioned that you're doing 30% construction projects as well, is that right?

## Matt (00:15:57 - 00:15:57)

Yeah.

## Moderator (00:15:58 - 00:16:19)

And going forward, as you continue to grow, it sounds like the business is going really well. Do you see what kind of direction you see the business going? Do you think you'll have more continued increased needs in. In services? Equal growth among both? Like what. What do you see changing or staying the same in your business as it continues to grow?

## Matt (00:16:20 - 00:16:24)

Equal. Equal growth in them? In both, yeah.

## Moderator (00:16:25 - 00:16:38)

Awesome. Is there anything I haven't asked about service trade that you left feeling positive or negative about that would be useful for them to learn from and improve?

## Matt (00:16:39 - 00:16:59)

I mean, and just to be honest, I mean it's all positive since, you know, the, you know, the business development keep, you know, they followed up really just to make sure that we are, you know, we were together. So. Yeah. And all the resources are provided. So I think it's basically a good job.

## Moderator (00:16:59 - 00:17:22)

They're doing great. I guess the last question might be they. I know you spoke with them. It wasn't the right timing. A good fit. What would be a good time to. For them to re. Engage? They want to be helpful but not pushy. When, when would be a good time to. To speak with them again?

## Matt (00:17:23 - 00:17:26)

Just immediately after the holidays, I'd say.

## Moderator (00:17:27 - 00:17:32)

Okay, great. Well, if someone reached out. Thank you so much for your time today. Sure.

## Matt (00:17:32 - 00:17:33)

Appreciate it as well.

## Moderator (00:17:33 - 00:17:34)

Have a great day.

## Matt (00:17:34 - 00:17:36)

Bye. Have a nice one. Cheers.