Date: 12.20.24

Name: Jay Saucedo

Stage: Potential to Win

Company Size: Emerging

Number of Techs: 10

Job Title / Level: Director of Operations

El Campo Refrigeration & Restaurant Supply

## Moderator (00:00:20 - 00:00:25)

See? Hold on.

## Jay (00:00:26 - 00:00:27)

Can you hear me?

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

I can hear you perfectly.

## Jay (00:00:28 - 00:00:31)

Okay, let's see. Make sure I've got.

## Moderator (00:00:31 - 00:00:32)

I can see you too, now.

## Jay (00:00:33 - 00:00:35)

Okay, good. There we go.

## Moderator (00:00:35 - 00:00:38)

Awesome. Thanks for making time today.

## Jay (00:00:38 - 00:00:40)

Yeah. How are you?

## Moderator (00:00:40 - 00:00:53)

I'm doing well. And you're approaching holidays with the kids, and it's. It's both a bit of fun, a little chaos. What do you got any plans for the holidays?

## Jay (00:00:54 - 00:01:03)

Yeah, my brother's coming in. My. Basically my family is all coming into town, so we. We just all get together and have a good time.

## Moderator (00:01:03 - 00:01:40)

I love to hear it. Let me give you context on the call. I work with service trade to help them learn more about their customers, their prospects. And their goal is to just better serve their customers and learn how to better earn the business of prospects. And so have a conversation for 30 minutes. Just hear about your experiences, service trade, evaluating them, kind of what. What goals you had in mind. It's very casual. It should feel pretty easy and painless if I do my job well. So thank you for the time. We'll record this. I'll use. We record all of them and aggregate them into a report for them to use. Is that okay with you?

## Jay (00:01:40 - 00:01:41)

Yep. That's good.

## Moderator (00:01:42 - 00:01:47)

Great. Well, let's just start. Get to know you. You mind introducing yourself, your role in the company?

## Jay (00:01:47 - 00:02:33)

Yeah. So my name is Jay Cedo, and I work at El Campo refrigeration. And I do kind of a little bit of everything. I, you know, I'm doing project management. And like whenever we have big projects and stuff, review like they're the. The plans, you know, when we get our plans from the architects and everything, just look over the equipment that we have and help the owner when it goes to bidding things out. I'm also in charge of the online sales that we have. So I'm over that too, kind of. I do a lot of stuff, but it's just from here. Do you.

## Moderator (00:02:34 - 00:02:36)

How many technicians do you have at your company currently?

## Jay (00:02:39 - 00:02:41)

Around right now? Around 10, I believe.

## Moderator (00:02:41 - 00:02:49)

Yeah. Great. And of just showing. Get an idea for the business. How much of your work is tied to service work versus projects?

## Jay (00:03:00 - 00:03:24)

Kind of evenly split, you know. And we do sales too, because we have a. We have a big show, big showroom. Our facility is a large facility and we're located on a major freeway, so we get a lot of traffic and everything here. So we sell like restaurant equipment and freezers, ice machines, all kind of stuff.

## Moderator (00:03:24 - 00:03:39)

Yeah, makes sense. Well, let's dive into the. The evaluation. You at some point went to look for a Vendor who could help you with your field management. What were you hoping it could accomplish for you? What was the pain you're trying to solve?

## Jay (00:03:40 - 00:04:39)

So right now we work with. We use a company called Field Edge and we have. It does its job, you know, but I'm always just looking for stuff and you know, we also were, you know, it's, it's, it's like it's gotten higher and higher over the years, the cost of it. So we wanted to just see what the options were. And that's when we came across you guys. We evaluated. What's the name of the other company there was. We evaluated Method, but it didn't really have everything that we needed. So we were not fully on board with what they had. We also evaluated what's the big one that everybody uses. Hold on, let me look.

## Moderator (00:04:42 - 00:04:45)

Was it Service Titan or Build Ops?

## Jay (00:04:46 - 00:05:12)

No, the CSM to the big. Oh man. When I realize it we.

## Moderator (00:05:12 - 00:05:12)

You.

## Jay (00:05:12 - 00:05:17)

You'll know it as soon as I say it. But I can't. It's not on top of my head right now.

## Moderator (00:05:17 - 00:05:34)

We'll move forward. Maybe we'll come to you. Yeah. As you compared, oh you were using something, it was getting more expensive and you're just curious kind of what else is out there? Is that kind of the right idea?

## Jay (00:05:37 - 00:05:45)

Software that we're using is either still the best fit or if there was someone that we would like to partner with better.

## Moderator (00:05:45 - 00:05:52)

Yeah. And did you come up with a set of criteria that were important to you as you looked at these new vendors?

## Jay (00:05:53 - 00:06:23)

They needed to meet our like, our needs first as far as like what the technician is going to need and needed to not put any additional stress on them when they're out in the field. It needed to be able to integrate with QuickBooks because that's what we use in the office and those were the, the main things. So we needed to have at least the features that we're currently using to where it's not going to add any additional pain to anyone here.

## Moderator (00:06:24 - 00:06:32)

Sure. And do you mind just getting specific with me on exactly what they use it for today? What the field uses that you need replicated.

## Jay (00:06:33 - 00:07:00)

The guys, they use it whenever they have their jobs, they go and they open it up. They that kind of like they can add pictures to it. They the basics. Like they can put notes in there, parts and stuff. They can select the parts that we know what to bill the customer for. But the billing does not happen on the. From the technician side. All that does is just give us the information in the office. To handle everything else.

## Moderator (00:07:01 - 00:07:09)

Got it. And do you use any other tools for those techs they have any other software that they use to help them do their job?

## Jay (00:07:10 - 00:07:12)

No, not the text. No.

## Moderator (00:07:12 - 00:07:13)

Got it.

## Jay (00:07:14 - 00:07:29)

We do use Auto Quotes here in the office when on our sales team, but that's more that, that's because Auto quotes is a very industry specific type of software that's for like restaurant and.

## Moderator (00:07:29 - 00:07:57)

Sure. And then some, some vendors are more specialized and others offer like construction project and service management and, and other things. Those, those sound like the two main tools you're using. There's one for the text, there's the quoting. How important is it that you have got a vendor who can do kind of multiple of those things or is it more important you kind of do best of breeding?

## Jay (00:07:57 - 00:08:48)

Well, the focus that we've had has been the one that's out there on the tech side because the Auto quotes, like I said, it's, it's very industry specific. Meaning that like the companies that are the, the, the manufacturers that we use, like your true, you know, true equipment, Hosaki, Manitowoc, all of those major vendors, they keep the information updated inside of Auto Quotes automatically. So when we go to Auto Quotes, we know that all of our, everything that we have available will be there built in. We don't have to go and find the information and add products to our system. It's automatically done for us by the, by the manufacturer.

## Moderator (00:08:49 - 00:08:55)

Makes sense. You mentioned how important the QuickBooks integration was. That makes sense.

## Jay (00:08:55 - 00:08:56)

Yes.

## Moderator (00:08:56 - 00:08:59)

Any other critical integrations for you?

## Jay (00:09:01 - 00:09:06)

No, not really. Just, just with QuickBooks is the main one.

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

Sure. Cool. And then in evaluating vendors and making this decision, who is involved.

## Jay (00:09:15 - 00:09:41)

We'Ve got a small team of people that we all kind of analyze. Myself and Lisa will kind of get the high level stuff book so we can kind of filter out and not waste a whole bunch of people's time. And then once we think hey, this is a company that we want to evaluate more in, more in depth, then we'll have the full meeting with everybody to look at a demo.

## Moderator (00:09:41 - 00:09:44)

Yeah. Who, what role does Lisa have?

## Jay (00:09:44 - 00:09:47)

Lisa is the controller of the company.

## Moderator (00:09:47 - 00:09:52)

Got it. And then what other people are you, are you bringing in? You said after that paper.

## Jay (00:09:52 - 00:10:21)

So we've got our parts manager, we've got our dispatch and then we've. I don't really know what her official title is, but she basically like we have certain companies that like plants and things and she's involved with, with them. She kind of takes care of all of our, our plant companies. And then we have the head of our AR team and she's involved as well.

## Moderator (00:10:21 - 00:10:37)

Got it. Awesome. Thank you for sharing. Cool. Let's dig into how service trade stacked up positives and negatives. Maybe we'll start with positives. What. What do you think they did? Well, both for me, you know, the product itself, but also any part of the experience.

## Jay (00:10:39 - 00:13:19)

Oh, if you understand, like, so we had a. We had both a positive and a negative experience with service trade, and they. The first guy that we were talking to was Brett. Now we're back in talks with them again. Now with. I think it's Brian that we're talking with, and we've had great experience now, but I think with Brett, he. I don't know if something rubbed him the wrong way, but it just. There came a point when we were doing our group meeting, and he didn't really seem interested in bringing us on board as a customer. He seemed very disconnected. He actually just shut down the demo and said, well, I don't think there's anything that we can do, and ended the call. So I was. It made me feel kind of weird because I called everybody in the room to have this, and it was taken away from all of their time. And then they said, well, what do we do? So I ended up calling them back and I said, hey, can we just see the demo? And he said, okay, sure. We'll go ahead and go through it. And so he did. But from that point on, I felt like it wasn't. It wasn't going to be moving forward. And it was. I don't. I wasn't sure what it. What the reasoning was, but also I felt like he was disingenuous on the. The cost of the software, too. I think he had told us a price up front, and then when he went back and we were like, we really like the software, but the guy is not really working with us very well. And then at that point, we asked him for the, hey, what's the final price? And it was way higher than what he was originally telling us. So I wasn't sure. I still am not sure what was going on there. But eventually someone else had kind of followed up with us, and I think it was Brian. And I just told him the story. I said, look, I said, we actually liked your software. We were real interested. But the guy that was trying to, you know, our. Our rep, he didn't seem very interested in trying very hard to get our business. You know, he sounded very uninterested, basically. And it didn't feel like he was going to be of much help to us. So that was the reason why we stopped looking at the time. And then now that we have Brian back, we've, we're in the middle of evaluating again and we're going to be doing that in January.

## Moderator (00:13:19 - 00:13:40)

Okay, great. Honing in on the product stuff, you said you thought it was a positive, something you could use and who you work with. I'd love to hear what about. It felt like it could be a good fit. And then also, you know, if there are any concerns in it that you're so curious about, perhaps I would love to know.

## Jay (00:13:42 - 00:15:53)

Off all of our boxes on the needs. And so that was, that was like, basically like our preliminary. When we're looking at things, we want to make sure it at least does these basics. Okay. Once we find those things, then I go and I say okay. When I'm watching the demo, there was a few things that impressed me and I think it was like the customer facing side of things. So for me it was impressive the way that the, the communication was sent to the customer, the way that the, the drafts looked. I guess if they send an email or anything like that and they are able to click and it goes to a site that hosts this, they can open up and see the details. Those were the positives. And I was like, you know, basically it, it does everything we're doing now, but it just does it every a cleaner and better way. So for me, that was a, that was a big positive. The negatives that we have is going to be the setup because obviously in the process of changing from one software to another, there's going to be some growing pains. But more importantly than that, the hard part is that we're going to probably be losing a lot of data because some of it, a lot of it doesn't come over exactly into the new system to where we might have to have a way to go back and look at some of the old history of things. Now once you're on one, your data is there and you'll be able to use it for a long time. But losing data was a, was a big important factor. It's like we need to make sure that this, whatever software we go with is worth losing access to some of that data for a while. So granted, you know, a year, two years, three years down the road, you know, it'll all work itself out. But in the short term, if we need to look at something from six months ago, a year ago, that, that's going to be pretty hard to, to not have Access to that.

## Moderator (00:15:54 - 00:16:02)

Did they provide you any path around that, any solution to. To that that service rate could support?

## Jay (00:16:08 - 00:16:27)

Wasn't a. It wasn't a full. Like we're not going to have full history. I think they said that there was something we could do and we understood. It was just the systems aren't compatible. We can probably export some of the data maybe, but I don't think it'll import just like it's supposed to. I'm not sure. It might.

## Moderator (00:16:27 - 00:16:33)

Okay. You said you're reevaluating for potentially decision in January, is that right?

## Jay (00:16:33 - 00:16:34)

Yes.

## Moderator (00:16:35 - 00:16:41)

Who are the other vendors you might be considering? Also, did you bring in any new players, any new considerations?

## Jay (00:16:43 - 00:16:59)

Because we've, we've already. We've already had the preliminary. You guys are the ones that we're really interested in now. The other one, the one that I can't remember their names, they actually had a really good software, but their cost was also a lot higher too.

## Moderator (00:16:59 - 00:17:09)

Yeah, I would. Do you mind seeing if we could pull it up in your email, maybe take 30 seconds and see if we can find it? Because yeah, they love to learn that type of information.

## Jay (00:17:09 - 00:17:10)

Yeah, sure.

## Moderator (00:17:10 - 00:17:11)

Just second.

## Jay (00:17:16 - 00:17:49)

It. It was Salesforce.

## Moderator (00:17:50 - 00:17:58)

Oh, wow. Okay. And what, what did you like about their solution for you?

## Jay (00:18:01 - 00:18:57)

I liked that it was going to incorporate like the thing about Salesforce is that they have their, their first side of things is the sales side of things and the service is like a. An afterthought for them. So. But their service was very well thought out. It was, it was really good. So I was like, kind of like we're getting two for one here. But I think the, the startup cost was. Was significantly higher in the beginning. The, even the annual. It would have increased. So, you know, from what we're currently at. So in the overall scheme of things, it is very nice software. It does a great job. But the cost of it was a little high for what we were wanting.

## Moderator (00:18:57 - 00:19:08)

Yeah. If it was priced the same as service trade, how would you compare the two? How would you rank the two if.

## Jay (00:19:08 - 00:19:18)

It was priced the same as service trade? Well, I mean, I think that Salesforce had a better integration.

## Moderator (00:19:19 - 00:19:20)

QuickBooks.

## Jay (00:19:21 - 00:20:29)

Well, not necessarily in QuickBooks. I think service, I mean, Salesforce, what I really liked about them was their integration into Gmail because we use Google Workspace currently. So with them being able to integrate into there to where you could see customer data history on customers directly from the Google Workspace interface, that was a huge benefit for them. I was like, this is nice because I might not be the one that's handling this customer. But if we get something from them and I can pull it up, I can instantly see the customer data, like, what. What did we do for them last? What are they calling about? And everything directly from the email interface. So that was a huge plus. But like I said, I. We weren't sold on whether the added cost was worth. Worth that, but it was it. If they were. If it was all the same, then, yeah, we probably would have signed up with them.

## Moderator (00:20:29 - 00:20:39)

Yeah. Useful to know. I'd like to hear you. Had you learned about. How did you hear about service trade in the first place?

## Jay (00:20:42 - 00:20:47)

Don't remember. It could have been through. Do y'all work with.

## Moderator (00:20:49 - 00:20:50)

Sorry.

## Jay (00:20:57 - 00:20:59)

Supply House?

## Moderator (00:21:01 - 00:21:03)

I don't know. I'm focused.

## Jay (00:21:03 - 00:21:20)

I think I want to say I saw something about you guys. I want to say it was with Supply House because every now and then Supply House has like, webinars and things. And I can't remember if that was how. I'm not sure how I originally saw. That's okay. That could have been it.

## Moderator (00:21:20 - 00:21:40)

I'm curious about your perception of service trade. Before you saw any pitches or demos compared to after was what did you think of them beforehand and did anything change, positive or negative, through the sales experience? Obviously it was a bad sales experience the first time, but learned about the product. So any. Any insights there?

## Jay (00:21:41 - 00:22:43)

Well, the. I didn't know what to expect. They kind of seem like they're a good. Like you guys seemed. Or service trade seems like they're a good company and they seem rock solid. When we had the negative experience with the sales guy, I didn't hold it against the company. You know, I knew that, like, hey, that's actually something we were talking about inside, internally. We were like, you know, if only we could just talk with somebody that's not him, you know, I think we'd probably make some progress, which was what we ended up doing. But that, I mean, the experience, once we actually saw it, I was impressed. More so because all beforehand we just knew, hey, they seem like a good company, but I mean, most companies do until you really get to know them, you know. So I think it was positive once I actually saw the software and saw the customer facing aspects of it.

## Moderator (00:22:43 - 00:23:00)

Yeah. Do you. Do the sales reps use it not only for service management, but like quoting and selling to you? Do you see it as a tool for people in the field, selling or.

## Jay (00:23:00 - 00:23:34)

No, we don't. We. We don't right now. And that was one of the things that Salesforce brought to the Table that I was like, okay, we could actually use this on the selling side of stuff. Which right now there was still some caveats because of auto quotes, you know, being so industry specific. I think we would have still kept auto quotes and used it in. In addition to the salesforce.

## Moderator (00:23:34 - 00:23:44)

Yeah, that makes sense. Did you just curious. Did you see ever see a demo or talk to service trade about their sales management tool?

## Jay (00:23:47 - 00:24:13)

No, not exactly. Because like I said, anything that's in the on that has to do with sales, that's just going to be like icing on the cake for us because the main part that we are evaluating is the service side. So that, that, that's the part that we have to get right. And so anything else that it does, then that's great, you know, but it, the main part is going to be the service.

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

I'm curious, do you see a tool like this as a way to help you like manage costs or a way to potentially drive more revenue? Like what, what side of the coin is it for you?

## Jay (00:24:35 - 00:25:04)

To me, it's just to be more efficient with technicians making sure that they're able to communicate, communicate the easiest way possible back to the office to let us know what we're doing. I don't really see it as a way to drive revenue or anything like that, although driving revenue would be a nice bonus for it. But the main thing is for the efficiency of the technicians.

## Moderator (00:25:04 - 00:25:24)

Yeah, that makes sense. Awesome. Before I, before we leave, you know, my job is to try to learn as much from you as possible. Your experience, both the sales team and the product, so they could go improve. Is there anything I haven't asked about, like help me do my job better? Anything that we could educate them on from your experience?

## Jay (00:25:28 - 00:26:10)

You know, I think they, the sales team likes to push a little bit. Now I get it though, because I'm like, I understand how that is on sales, but. And for a lot of companies you have to be like that. But I think for like here, Mikey, like our, our owner, he doesn't like feeling pressured or pushed at all. And so that's a big turnoff and he'll b. He'll just put the brakes on it. You know, if he feels that way, he wants everything done on his time. So he's like, when I'm ready for it, that's when we're gonna do things. So that's the only thing. But you know, it, it hasn't been too bad at all. It's just one of those things that I wanted to show. Share that.

## Moderator (00:26:10 - 00:26:13)

Yeah, great. Well, Jay, thank you so much for your time.

## Jay (00:26:13 - 00:26:15)

Yep. Thank you.

## Moderator (00:26:15 - 00:26:16)

You're welcome. Have a great day.

## Jay (00:26:16 - 00:26:18)

Absolutely. All right. You, too. Bye.