Date: 2.13.25

Name: Heather Carro

Stage: Potential to win

Company Size: Corporate

Number of Techs: 12

Job Title / Level:

Lone Rock Services

## Heather Carro (00:00:21 - 00:00:22)

Good morning, this is Heather with momax.

## Moderator (00:00:22 - 00:00:28)

Hi Heather, this is Drew Giovanoli calling about paid interview about ServiceTrade. Are you still free?

## Heather Carro (00:00:29 - 00:00:31)

I have a couple of minutes, yeah.

## Moderator (00:00:31 - 00:00:51)

Okay, great. My goal is just to walk through some of your experience in evaluating ServiceTrade. Can you just start with context? And this is a paid interview. We'll compensate you for your time. Can you share with me a little bit about how you first ran into ServiceTrade?

## Heather Carro (00:00:53 - 00:01:09)

We have the owner is very well known and known amongst other businesses and other businesses have used ServiceTrade and put that out there for us. So we took a look at it.

## Moderator (00:01:09 - 00:01:13)

Great. And how many technicians do you have?

## Heather Carro (00:01:15 - 00:01:15)

12.

## Moderator (00:01:16 - 00:01:22)

12. And are they. Do you do both? What's the split of project and service work? For those Technic.

## Heather Carro (00:01:24 - 00:01:28)

That is probably two and the rest are service.

## Moderator (00:01:29 - 00:01:41)

Got it. So you have technicians specifically for it. Is that an equal distribution of work as well? Is it 15% ish on project work and 85% just overall service work?

## Heather Carro (00:01:42 - 00:01:42)

Yeah.

## Moderator (00:01:42 - 00:01:49)

Great. Who else did you consider when you were evaluating tools for service management?

## Heather Carro (00:01:51 - 00:02:05)

Zendesk. What's the other one? Service titan. Busy busy. Evolve. We've looked at many.

## Moderator (00:02:05 - 00:02:08)

Okay, great. Did you end up going with one of those options?

## Heather Carro (00:02:11 - 00:02:15)

As of right now, we're leaning towards one, but we have not gone with one.

## Moderator (00:02:15 - 00:02:25)

Can you tell me, even if you don't want to name that one, what that vendor does very well that's making you lean towards them?

## Heather Carro (00:02:27 - 00:02:40)

It's a couple of things, but customizable fields to ensure that things are filled out like they. They have to be filled out before they can close out a call.

## Moderator (00:02:40 - 00:02:49)

Got it. That makes sense. Can you share any feedback on ServiceTrade? What are the things you thought they did well and the things they didn't do so well?

## Heather Carro (00:02:51 - 00:03:00)

The presentation that was given was great. The person was very knowledgeable. It just didn't hit all of our boxes. That's really all that it came down to.

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

Sure. Can you share some of those boxes that were like important to you? What were the criteria going in?

## Heather Carro (00:03:09 - 00:03:31)

We really wanted email to ticket, although we find that that is very difficult to find. We wanted the required customizable fields, GPS tracking, timesheet capability, time tracking capability, without having to have a bunch of other stuff incorporated to make that all happen?

## Moderator (00:03:32 - 00:03:42)

Sure. And did. Does the vendor that you're looking at now kind of meet all those criteria or there some things you had to sacrifice?

## Heather Carro (00:03:43 - 00:03:48)

The only thing so far we've had to sacrifice is the email. The ticket.

## Moderator (00:03:48 - 00:04:11)

Got it. And you said it was a positive experience. In the demo, you said that the person kind of was knowledgeable. Was there. Do you have any kind of recommendations on things they could have done to stand out or to earn your business? I guess outside of hitting some of those key criteria.

## Heather Carro (00:04:12 - 00:04:14)

I'm sorry, can you say that one more time?

## Moderator (00:04:14 - 00:04:30)

Sure. Was there anything else you wish that ServiceTrade could have done outside of the criteria you match that would have helped them earn your business? Okay, how about integrations? Anything like your accounting system or CRM that are important to you?

## Heather Carro (00:04:32 - 00:04:33)

Not necessarily, no.

## Moderator (00:04:34 - 00:04:48)

Okay, if you had to, if you were in charge of, of ServiceTrade, in charge of product, what would be the first couple things you change to better serve clients like yourself?

## Heather Carro (00:04:53 - 00:05:11)

Probably really work towards email to ticket. I think that that's huge for a lot of people. It makes it more hands off so that you aren't in there touching everything so much. And also those required customizable fields.

## Moderator (00:05:11 - 00:05:19)

Sure, sure. How about pricing and packaging? Any feedback on how ServiceTrade compares to other people?

## Heather Carro (00:05:22 - 00:05:24)

It was comparable.

## Moderator (00:05:25 - 00:05:49)

Okay. Yeah. And the. I apologize if I didn't remember hearing this. You had a pretty broad list of people you looked at. How did you source that list to begin with? You mentioned your owner is knowledgeable in the space and knew a lot of people, but when was it just kind of all referrals through other businesses that he knew?

## Heather Carro (00:05:50 - 00:06:02)

No, a lot of them were referrals. A lot were, I shouldn't say a lot. A few were just me digging in and searching out, kind of seeking on, you know, Google searches and stuff like that, trying to dig in.

## Moderator (00:06:03 - 00:06:12)

Yeah, certainly. Can you, can you share who you're leaning towards? Busy, busy. Great.

## Moderator (00:06:14 - 00:06:14)

Cool.

## Moderator (00:06:14 - 00:06:43)

I'm going to keep this short, maybe just only a few more questions and I really appreciate you picking up and sharing this feedback. So if you were to go with busy, busy and you're a year down the line and you've loved kind of how, what they've delivered for your business, what do you think the results would be? What are those like pain points you're looking to solve? What is the outcome that you're like, hell yeah, this was a great, a great decision and as a result my business looks like this now compared to that.

## Heather Carro (00:06:47 - 00:07:29)

Being able to have less touches on our tickets. Currently we have a different system in place. We have to go in and we have to make changes to that and then our techs also write out a paper ticket and then we have to follow up on those paper tickets, which is all time consuming and it's time that we currently don't have because we are too busy. We're growing fast and if we could take some of that multiple touches on one job away and save that time, that would be huge.

## Moderator (00:07:29 - 00:07:34)

Yeah, that makes sense. So right now you're on paper and pencil or you know, paper and pen.

## Heather Carro (00:07:34 - 00:07:44)

I mean we are as far as like timekeeping and some of the job descriptions and stuff. Materials.

## Moderator (00:07:44 - 00:07:44)

Yeah.

## Heather Carro (00:07:44 - 00:07:59)

Where we also have another system that we use a service system that we use where they can upload pictures and put in a description and stuff like that but it's not being utilized appropriately because it doesn't check all the boxes. So we have to do two different things.

## Moderator (00:07:59 - 00:08:01)

Got it. And what system are you on now?

## Heather Carro (00:08:02 - 00:08:03)

Mhelp.

## Moderator (00:08:04 - 00:08:22)

Okay, great. Last couple of questions or anything. I haven't asked about that. If I'm trying to learn about the market for ServiceTrade helping better serve clients prospects that I should. I should have asked you about what's top of your mind top priorities in this space that we haven't chatted about yet.

## Heather Carro (00:08:23 - 00:08:25)

I don't think there's anything.

## Moderator (00:08:25 - 00:08:43)

Okay. And I guess just you said it was a positive sales experience but any learnings from. From busy busy that ServiceTrade could have on like the people side of things on how they've engaged with you or thinking about implementation that they could learn from to try to improve?

## Heather Carro (00:08:46 - 00:08:51)

I don't think so. Like I said, they were very knowledgeable. It just. The system is what it is right now. So.

## Moderator (00:08:51 - 00:08:59)

Yeah. Great. Okay. Well thank you so much for your time. It was a pleasure to meet you and short but insightful conversation.

## Heather Carro (00:09:00 - 00:09:01)

Thank you.

## Moderator (00:09:01 - 00:09:02)

Have a great day.

## Heather Carro (00:09:03 - 00:09:04)

You too.

## Moderator (00:09:04 - 00:11:08)

Bye little beast.

## Moderator (00:14:37 - 00:15:09)

Whatever you want to challenge them about it? Okay. I have training. Okay. I'll do 10 bucks. You want to do that? I'll do that.

## Moderator (00:15:09 - 00:15:10)

Sure?

## Moderator (00:15:10 - 00:16:58)

Yeah. Okay. Thank you you very much. Awesome. Thank you. Yeah, you should never do you really. Hell no. You never done it ever. You never want. Oh yeah, I know you're. You shouldn't. Yeah, you should never do you. Do you. Do you not. Hell no, you never. Oh yeah. No, I think you're back. I can already tell you're a horrible implode. No you shouldn't. Yeah, you should never do you. Uhuh. Do you really not. Hell no. You've never done it ever. You never wanted to. Oh yeah, I wanted to. And you should do it. I think you're bad. I can already tell you're a horrible inflow. No you shouldn't. Yeah, you should never do you. Yes. Do you really not. You shouldn't. Yeah, you should never do you no. Do you really.

## Moderator (00:27:35 - 00:28:20)

2025 for your B2B marketing and sales strategy you're already behind 7 out of 10 B2B buyers not just B2C watch videos as part of their sales journey and 90% of those B2B buyers say video content is their preferred content. So a B2B buyer is going to interact with 13 pieces of content before before they'll even engage with your brand. That is a lot of content and budgets are tight everywhere right now. Right. And so businesses are going to have to learn how to create content in house to supplement like the bigger budget, higher production value content. Right. Especially because video is the second most.

## Moderator (00:28:51 - 00:28:54)

The brand template was born and.

## Heather Carro (00:29:11 - 00:29:11)

The.

## Moderator (00:29:11 - 00:29:48)

Brand template was born and there the first struggle I'll just again be honest being honest is that the timeline of the flyer creations they're the first struggle I'll just again be honest being honest is that the timeline of those flyer creations.