Date: 2.20.25

Name: Michael Dalton

Stage: Potential to win

Company Size: Emerging

Number of Techs: 5

Job Title / Level: President

Speaker 1: How are you doing?

Speaker 2: Hey Mike, how are you?

Speaker 1: Good.

Speaker 2: Thank you so much for making time today.

Speaker 1: Yeah, I have a little time. Yep. About a half hour, right?

Speaker 2: Yep, that's it.

Speaker 1: Okay.

Speaker 2: Maybe less. Lemme give you a little quick context. My name is Drew Jovani. I am doing research on behalf of service trade and you're paid and compensated for your time. But what they're looking for is to find out how to get better, serve their clients, earn the business, new prospects, and so it's a casual conversation to hear about your business, your experience in the industry, and any thoughts about service trading and its competitors. So if you don't mind, number one, we'll record this conversation so I can aggregate it and have a transcript alongside the other conversations. Is that okay with you?

Speaker 1: Yep, I saw that.

Speaker 2: Cool. And then from there I'll guide you through the conversation. Does that sound all right?

Speaker 1: Yep, sounds fine.

Speaker 2: Great. Well, Mike, nice to meet you. Just for the record, do you mind introducing yourself and the role at the company?

Speaker 1: I'm the president of the company.

Speaker 2: Great. How many technicians does the company have?

Speaker 1: Five.

Speaker 2: Great. What's your split between install kind of project work versus service

Speaker 1: Work? Two and three. Two service, three install.

Speaker 2: Got it. So that's the split of the workers. It sounds like they're specific to specific install versus contract. Is that the same kind of split in terms of revenue to your business?

Speaker 1: What was that? I didn't quite,

Speaker 2: Is the split between install and projects? I heard you split between technicians, but is that also representative of the amount of business you bring in for each

Speaker 3: Unknown caller?

Speaker 1: Probably right now a dollar amount is probably, it's close to it.

Speaker 2: Okay, cool. How did you first hear about service trade?

Speaker 1: I've had service trade books for a long time. 40 years.

Speaker 2: 40 years. You've worked with Service Trade?

Speaker 1: Yeah. Well, I paid their books. I don't get the books every year. I had the service for a while, then I just kept the books I had and just upgraded 'em as I needed to.

Speaker 2: I want to make sure, I think we're on the same page. Service Trade was founded I think in the 2010, 2012 category.

Speaker 1: Maybe I'm thinking of something else. Okay. Yeah, I'm thinking of, okay. Trimble is, they call our book service trade books.

Speaker 2: Oh, got it.

Speaker 1: There is confusion. So I don't have service trade.

Speaker 2: Yeah, that's fine. But do you speak with them at some point this year maybe about

Speaker 1: Yes. Yes I did.

Speaker 2: Great. And how did that intro happen? How did that conversation even begin?

Speaker 1: I researched it online.

Speaker 2: Okay. And what pain points were you guys having that you wanted to invest in a tool like that?

Speaker 1: Well, I was just looking to see what turn, my computer is messed up here. I'm trying to, I was looking to see what service trade, what their program was because Pacer and a couple of their other competitors approached me, so I did a little research on puppies that are competitive with service trade and that service trade came up.

Speaker 2: Sure. What did you find? How would you compare the two?

Speaker 1: I thought Pacer was, there we go. I thought Pacer was a little more user-friendly than Service Tray.

Speaker 2: Okay.

Speaker 1: I didn't go with them either. I haven't pulled the trigger yet, so

Speaker 2: It's okay.

Speaker 1: I'm

Speaker 2: A researcher, not a sales person. I'm just here.

Speaker 1: Yeah, I know. Yeah. Price probably was the reason. I dunno if I'm big enough that it's worth spending the money per month with service trade.

Speaker 2: Sure. You said that Pacer was, well, a little better experience describe,

Speaker 1: Well, a little user, more user friendly, it seems to me. Just so you go through their demo, their tutorial, and it just seemed like it was a little bit more user-friendly.

Speaker 2: Sure. Anything else that was obvious from this sales conversation that Servicer could improve that would get you excited?

Speaker 1: I don't know if they could, well, it's all off iPad type driven system. Right. Or your iPhone, and I guess the tutorial could have been a little better explained, but it's a lot to grasp on the Zoom call. It's a lot to grasp sometimes.

Speaker 2: Was there anything particular that they did well that you was quite

Speaker 1: A good Well, they answer all my questions. I mean, I'm going to say that the person I talked to, I can't remember the name of the person, but they answer all my questions. They got back to me. We had some questions we wanted answered and then they did get back to me and gave me the answers.

Speaker 2: Yep. Okay. What was the big pain point you were hoping to solve for 'em? It sounds like you're not big enough to make it's worth the investment, but what were you hoping they could do if the price made sense?

Speaker 1: Well, so I'm 68. I'm going to be retiring in a couple of years and my boys are going to be running the show, and I was trying to get it a little bit more simple, a little bit more simplified. The operation, I keep track of everything now. I have my financial part and QuickBooks. I operate with a Google calendar with all our calls and projects and I update it and all that. Whereas the guys out in the field for the service end, they could be updating daily, hourly, actually, or real time having two service techs. I don't know if I would really need it. If I had five service techs, it would probably be something I would have been pursued, just to be honest with you, because the guys out in the field and the install, they're every day the same place. They got their marching orders. I mean, I can just call on the phone and say, where are you at? I didn't see as much value for the install, but there is a lot more value to the service end because they're updating in real time, know where they are when if you got to order parts, you can invoice right away instead of me having to wait until come back with written paperwork to data entry into the computer. Plus, we're looking at more of right now they have time sheets they fill out daily, whereas that's all part of the programs.

Speaker 1: I know it does interface with QuickBooks, so that's nice.

Speaker 4: Yeah,

Speaker 1: And that's kind of what I was looking for, or it seemed just what they had to offer and if it could fit for me now or not, I don't know.

Speaker 4: That makes sense.

Speaker 1: Right now, I don't think you're quite big enough to pay for

Speaker 2: Sure.

Speaker 1: Something like that.

Speaker 2: That makes sense. Well, you mentioned QuickBooks, not integration. Anything else you needed to work well with? Maybe it's your ERP system or job costing tools?

Speaker 1: No, because job costing was kind of built right into their programming.

Speaker 4: Yeah.

Speaker 1: I mean, QuickBooks has job costing also, so pretty much we do a cost evaluation right now. We do it all manually. It's what it is. Right.

Speaker 2: For sure. How long have you been doing this business?

Speaker 1: How about, I've been in business 44 years.

Speaker 2: That's awesome. Congratulations. And almost retired.

Speaker 1: What was that?

Speaker 2: I said, and almost retired you mentioned.

Speaker 1: Yeah, I'm close there. I'm 68, 70. I'm going to be just part-time right now. I'm four days a week.

Speaker 2: There you go.

Speaker 1: Try to be three days a week, come June and then the next year, maybe two days a week, and then I'll be done.

Speaker 2: Nice, nice. Well, my business is supporting Fast Spring, but something I started just 18 months ago, so I've got a few years to go. But yeah,

Speaker 1: We got a few, got some trials and tribulations of go through.

Speaker 2: That's right. Yep. The first few years though, have plenty of those involved. Hopefully it's settles down a bit. I'd love to hear your interaction with the sales team. How was, was it positive? Was it informative? Were the

Speaker 1: Yeah, it was positive. I had no, I didn't have anything negative or say they didn't do a good enough job.

Speaker 2: Yeah. Was there anything that you learned about the business in that sales meeting that was surprising? Something that you didn't expect that they did, or ways that they could help you?

Speaker 1: Not really, because I've done a few other sales pitches, other companies, they're all very similar. Okay. I think it's how user-friendly they are and I mean, I think it's, Titan had as a first company that I had a sales pitch with, and so I kind of know what to expect.

Speaker 2: Yeah, sure. I've got a couple, my favorite questions I saved for a second half towards the end. First one is, if you were the owner of Service Trade, what would you do to better serve a client like yourself? What would you think about product wise people? Anything?

Speaker 1: Now Say it again.

Speaker 2: No

Speaker 1: Problem. Walked in the office here.

Speaker 2: Yeah. No sweat. No sweat. What is this Chris for? Granger, for the return

Speaker 1: Already. It's already here. It's already printed, everything.

Speaker 2: Oh, it's beautiful. I'm glad I,

Speaker 1: Okay. All right, Chris.

Speaker 2: And covered my eyes. Crossed my eyes.

Speaker 1: Okay, Christopher.

Speaker 2: Alright, go ahead. Question was, you're the owner of Service Trade. What would you do to better serve customer like yourself?

Speaker 1: I guess they walk through it. They walk through how it operates. Let's say if you were a technician and what you would do that probably could be a little smoother so you got a good, they give you a smattering of what it does, but kind of like, okay, here's your business. You get a call and step by step how their process would work directly and they did that somewhat, but I guess that would be just so that you know, got a better feel for what the software's doing for you.

Speaker 4: Sure.

Speaker 1: When you input, when they're out in the field, they're inputting data, where does that data go or does it exactly what physically it does. Okay. You know what I mean? When is it in integrate to QuickBooks? How do you use it Exactly For their time, for their payroll records, and that's what we were looking for originally was just something that they can put their time in and at the end of the day we know what their hours were and they did show me some of that, but I didn't know if I had to pick it off or if it automatically gave me a tally at the end of the day or at the end of the week. You know what I'm saying? Yeah. So

Speaker 4: That

Speaker 1: Would be something that I think they should marvel a walk you through, Hey, we know that you got a service business, your service tech's out there, this is how to operate.

Speaker 2: Yeah. You've got two service techs now, is there ambitions to grow past that or are you guys at a level you guys are?

Speaker 1: No, I mean, yeah, we've grown from one guy to, there's actually eight people working here.

Speaker 2: Amazing's

Speaker 1: Awesome. So I mean it's a dollar. Sure. We're brought every year, little by little we take baby steps, not big jumps. Sure. Baby steps are a little safer and you're a little more controlled.

Speaker 2: Sure. Well, a question I like is if we're a year from now, let's say that the size, the number of techs is not a problem, you've got enough techs at this point, what would have to have happened for it to be worth it for you to use one of these tools, service, trade, or somebody else besides being big enough to make cost, make sense? What's happened?

Speaker 1: Well, obviously with more techs you're going to have more money. I mean that's how we make my money is off the techs working. Right. And then the install guys off the, I don't know, like I said, if I had five techs, it'd probably be more of a worthwhile thing.

Speaker 2: Yeah, that makes sense.

Speaker 1: With two of 'em, I got a pretty good handle where they're and what they're doing all the time.

Speaker 2: Yeah, that makes sense. Alright, well my job is to just extract as much learning from you for service trade as possible. Is there anything I haven't asked about that you think service create could benefit from? Just your experience, your working with service techs, seeing different software, anything that ServiceTitan did incredibly well in the sales process?

Speaker 1: Well, I did this stuff all about what, four months ago? Well, I was going to rate, let's say's the three ones I've mentioned, I would rate is Pacer Trade service. Trade Service. Right. And then Titan. And as far as, I think user-friendly pager just seemed to be easier unless they just explained it better. It seemed easier to input and get information out and the general operation.

Speaker 4: Yeah,

Speaker 1: Probably if I was to revisit this in a year, I'm sure I would probably revisit those three companies again.

Speaker 2: Great. Well Mike, it was a pleasure chatting with you today. Thank you for your time.

Speaker 1: Okay,

Speaker 2: Two quick things. One, you'll get compensated via email. It'll come from our vendor. Tremendous. We'll reach out and make sure you got it. But number one, just thank you and look out for your compensation in 24 hours. The second, the last thing is, the hardest part about my business is finding great people like you to talk to. And so the question is, if there's anybody that you know in the industry who's got more reps, maybe 20, 30, 50 reps that we could learn from, technicians we could learn from, we'd be happy to compensate you even more for the referral and compensate them as well for their time.

Speaker 1: Well, the only referral I would give you would be put AONE Enterprises. I know he is interested in. I don't know how much research he's done. Hold on here.

Speaker 2: And this is a research, this doesn't have to be somebody who's going to necessarily purchase.

Speaker 1: Right. I got to change programs here.

Speaker 3: Actually the economy grows faster than the money supply. There we go. You actually have situation for people because get rid of inflation and you drop the interest rates and that makes people's mortgage payment go down. They credit payment, go down, they payment go down.

Speaker 1: So Pit aone, enterprise, P-I-P-I-T-O-N-E Enterprises,

Speaker 2: Do you know about their size?

Speaker 1: Yeah, they're bigger than me. They're quite a bit bigger. They have a lot of techs. They might have 15 to 20.

Speaker 2: Okay, great. We'll reach out and what's the best way to get connected? Their

Speaker 1: Main phone is (585) 293-0961.

Speaker 2: Got it. I think I found 'em online.

Speaker 1: Yeah, I'm sure you have.

Speaker 2: Alright, thanks Mike. You have a great day.

Speaker 1: You too now. Bye.

### Win/Loss Summary for Service Trade - Client: Mike (President of a Service Company)

\*\*1. Overview\*\*

- \*\*Interview Context:\*\* Drew Jovani conducted the conversation to gather insights on how Service Trade can improve its offerings to clients like Mike's company. The discussion revolved around the company’s experiences with competitors, how Service Trade's offerings compare, and specific pain points Mike has encountered that Service Trade could address.

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\*\*2. Key Learnings and Insights\*\*

#### A. Client Experience and Competitor Analysis

- \*\*Client Experience with Sales Teams:\*\*

- Mike noted that he had a "positive" experience with the service and that representatives "answered all my questions" effectively.

- \*\*Competitor Comparisons:\*\*

- Mike expressed a preference for Pacer, stating, “I thought Pacer was a little more user-friendly than Service Trade.” This indicates that user experience is a significant factor in his decision-making process.

#### B. Pain Points and Needs

- \*\*Pain Points Identified:\*\*

- Mike highlighted his current challenges with managing operations, saying, "I keep track of everything now... with a Google calendar... I update it and all that." He is seeking a more streamlined solution as he prepares to pass the company onto his sons in the near future.

- \*\*Operational Simplification Needs:\*\*

- He mentioned wanting to "get it a little bit more simplified," indicating a need for tools that can aid in real-time tracking and reporting without overwhelming him or his technicians.

#### C. Pricing Concerns

- Mike pointed out that \*\*pricing\*\* is a barrier, as he feels his company may not be large enough to justify the monthly fees: "I dunno if I'm big enough that it's worth spending the money per month with service trade.”

#### D. User Experience Expectations

- \*\*User-Friendliness Concerns:\*\*

- Mike indicated that the tutorial for Service Trade was somewhat lacking: “the tutorial could have been a little better explained, but it's a lot to grasp.”

- \*\*Integration with Existing Systems:\*\*

- He appreciated the integration capabilities, mentioning, "I know it does interface with QuickBooks, so that's nice," highlighting the importance of seamless integration in his workflow.

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\*\*3. Growth Opportunities\*\*

- \*\*User-Focused Product Development:\*\*

- Mike desires a clearer understanding of how the software integrates into daily operations. He stated: “I guess they walk through how it operates... they give you a smattering of what it does, but... step by step how their process would work directly.” Developing a more hands-on instructional demo could make the solution more appealing.

- \*\*Targeted Marketing to Smaller Businesses:\*\*

- As Mike's company has only two service techs, marketing efforts could focus on simplifying offerings for companies of similar size or providing flexible pricing structures based on the number of users.

#### E. Cross-Selling Opportunities

- \*\*Increase in Technicians:\*\*

- Mike mentioned growth ambitions, indicating that if he had more technicians, he would consider investing in such tools: "If I had five service techs, it would probably be something I would have been pursued." Keeping in contact for future needs could be beneficial.

#### F. Referral Opportunities

- \*\*Leverage Referrals:\*\*

- Mike provided a potential lead for Service Trade research: "the only referral I would give you would be put AONE Enterprises," suggesting that they could also benefit from Service Trade’s products.

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\*\*4. Red Flags\*\*

- \*\*User Experience Hurdles:\*\*

- The perceived complexity of the software and the existing tools can detract from the overall effectiveness and desirability of the Service Trade solution.

- \*\*Budget Constraints:\*\*

- As Mike indicated that current costs may not be justifiable for his company size, pricing strategies need to be considered and revised to accommodate smaller businesses effectively.

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\*\*5. Conclusion\*\*

The conversation with Mike yields valuable insights into where Service Trade can enhance its product offerings, particularly in user experience, understanding customer needs, and pricing structures. Focus on clarity in demonstrations, customer education, and targeted marketing can help capture more prospects like Mike’s company in the future.

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This summary can be utilized to structure a comprehensive report for the service teams to encourage further development in these highlighted segments and address identified pain points effectively.