Date: 12.20.24

Name: Ashley Blackard

Stage: Closed Won

Company Size: Corporate

Number of Techs: 18

Job Title / Level: Operations Administrator

RushCo Energy Specialists

## Moderator (00:02:23 - 00:02:24)

Hi, Ashley.

## Ashley (00:02:24 - 00:02:25)

Hello.

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

How are you?

## Ashley (00:02:26 - 00:02:28)

I'm good. How are you?

## Moderator (00:02:28 - 00:02:30)

Excellent, Excellent. Thanks for taking some time today.

## Ashley (00:02:31 - 00:02:32)

Absolutely.

## Moderator (00:02:32 - 00:02:47)

Great. Well, let me set the stage for us. So this interview is being conducted to help us learn more about your experience with service trade. And with your permission, we'll be recording the conversation. Is that okay?

## Ashley (00:02:48 - 00:02:49)

Absolutely. That's okay.

## Moderator (00:02:49 - 00:03:06)

Okay, awesome. So the recording, along with the transcript of the interview, we're going to use it to create a report that will be shared with our client Service trade. And all of these materials, the recording, the transcript, the report is going to be shared with Service Trade to help them gain valuable insights from customers like yourself. Any questions?

## Ashley (00:03:06 - 00:03:07)

No. No questions.

## Moderator (00:03:07 - 00:03:16)

Okay, great. So my understanding is that you recently evaluated service trade and decided to go with them. Is that correct?

## Ashley (00:03:16 - 00:03:17)

That's correct, yes.

## Moderator (00:03:17 - 00:03:23)

Okay, excellent. Can you just start by briefly introducing yourself and your role in your company?

## Ashley (00:03:24 - 00:04:56)

So my name is Ashley Blechard. I've been with Rush co energy specialist for a little over three years now. I started in the accounting department, kind of worked my way around and I now oversee a variety of administrative operation functions, accounting, sales, HR and it. So day to day, my day is very different depending on. We are a small business, we have about 40 employees and privately owned company. We've been in business for a little over 40 years and we are an H VAC commercial service contractor. So we work primarily everything that we do is commercial and we have a really big presence in the industrial manufacturing world and servicing their H Vac needs. So that is the majority of our business. And what we do, we have a few different apartments. We do everything from a, you know, normal service call where a plant's heat or AC is out and they need some. They need service all the way to larger scale projects that could be multi million dollar projects and renovations and things like that. So pretty wide variety of stuff that we have going on here. But that is a little bit about me and a little bit about Rushco.

## Moderator (00:04:56 - 00:05:05)

Yes, that's excellent. So. So I have a better sense of the company's scope. Of the 40 employees, how many of them are technicians?

## Ashley (00:05:05 - 00:05:10)

Out of those 40 we have. Right. At 18 technicians.

## Moderator (00:05:10 - 00:05:26)

Okay, awesome. And then you talked about the, the different types of engagements that you have with customers. You know, some are service related and others are, I would imagine like installation of your. Of your product. Is that fair to say?

## Ashley (00:05:26 - 00:05:29)

That's fair. We split it up service and projects to make it.

## Moderator (00:05:29 - 00:05:38)

Service and projects. Yes. And what. Tell me a little bit more about the, the breakdown is there. What percentage is Project versus service.

## Ashley (00:05:38 - 00:06:00)

I would say as far as percentage of jobs versus not necessarily percentage of revenue, but percentage of jobs that we do, it's usually about a 75 service or service jobs and about 25 them are project jobs. And that's kind of how we distinguish between the two.

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

Yeah, that's great. So I'd like to hear a little bit more about your needs and the process when you're evaluating service trade. So when you were looking at just more broadly field service management tools, what were you hoping it would accomplish for you?

## Ashley (00:06:17 - 00:07:33)

So for us a really big thing was something that would honestly save time, automate workflows. We have had a lot of paper processes, so very antiquated. We did have a system in place that we're replacing with service trade, but it was a Microsoft Access based program, so very difficult to use. So big, big things for us where we're automating things, ultimately saving time and seeing efficiency, optimizing workflows and processes for you, daily things for our staff, that was a really big one. Giving our technicians the ability to have more visibility out in the field, look at work history, being able to be in charge of their own time versus communicating with the office on what their time throughout the day looked like. So giving them more visibility and more functionality while they're out in the field and not here in the office was also a very big motivator and something that if we were going to switch, we had to, we had to make sure it was definitely going to improve those areas.

## Moderator (00:07:34 - 00:07:45)

Yeah, that makes sense. And so as you were looking at the marketplace of vendors, were there criteria that moved up to the top of the list that were the most important to you?

## Ashley (00:07:46 - 00:09:09)

Yes. Something that really affected our search as we were looking through vendors was compatibility with QuickBooks, which is what used for our accounting finance software. Not just compatibility in that it, you know, integrated with QuickBooks and information flowed back and forth, but how that information flowed back and forth and how it was specifically mapped with QuickBooks, that was a really big thing for us. I looked at a wide variety of solutions. Our my search actually started last, not this past summer, but the summer before. We didn't find a solution that met our needs. So I picked it back up this summer and that was really became a make it or break it factor for us. And there were some solutions where we loved the functionality that they offered, but then they just didn't work with QuickBooks like service trade works with QuickBooks. So that was, that became a really big deal for us as well as figuring out how we manage purchase orders, use a lot of purchase orders. And so having a software that was allowed us to still have something that was similar in our process and workflows with purchase orders that we were currently doing to where we were able to still have purchase orders or something similar.

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

Yep. Okay, that makes a lot of sense. So the financial integrations and functionality, really important there. So when you think about the software, you know, do, do you kind of see it conceptually more as a tool to drive more sales? Or would you say it's a tool to cut costs?

## Ashley (00:09:32 - 00:10:48)

I, I view it more as a tool to cut cost by improving, you know, our processes and our efficiency. Now there are some things with that service trade offers that we've never had before that I could see how they would improve sales. And we've just never had those tools or resources at our fingertips to really utilize them. For example, quoting so that we really liked. And a driving factor why we went with service trade was that you can do your quoting and your estimating within service trade and that becomes your work order and that becomes your invoice. Right now it's very manual where we're using Adobe where our sales team, sales team of four, and so they're creating quotes and estimates in Adobe Excel work. So I could. They kind of, to me, we kind of go hand in hand. By optimizing those processes and saving time, our sales team now doesn't have to spend, you know, four hours trying to put together a quarter estimate. They can automate some of that in using service trade and hopefully process more quotes and sales, you know, so.

## Moderator (00:10:48 - 00:11:14)

Yep, great. Now some of the vendors are, as you know, more specialized and then others offer, you know, a broader set of services, you know, from the construction project standpoint to service management. What you may have touched on this, but just to sharpen it, you know, what are the, like the field service management tools that are most important to the team today?

## Ashley (00:11:17 - 00:12:01)

So I would say most important to us is being able to have those quoting abilities. Being able for techs to be able to see the history of work logging their own time is important. Let's see. Honestly, even the visibility that's offered with the dispatch and scheduling, the mapping, we don't have a map ability now. We're able to visually see where your technicians are, where they could go next, just for better decision making. I don't know if that directly answers your question. If not, feel free to redirect me.

## Moderator (00:12:01 - 00:12:03)

That's great. That's exactly what I was looking for.

## Ashley (00:12:03 - 00:12:08)

But definitely some of Those functionalities for sure.

## Moderator (00:12:08 - 00:12:21)

Yep. So let's think about another topic. So from a scale of 1 to 10, how important is it for you or for the team to have an all in one solution?

## Ashley (00:12:23 - 00:13:33)

Super important. I would say eight or nine. Very important. As opposed to having like a, you know, Frankenstein model where do a little bit in each, which is what we have now. So very important. We use a lot of spreadsheets to just make up or we use those past tense because we won't now that we're going to be using service trade. But we used a lot of spreadsheets to kind of make up some of those areas that we lacked visibility in with our current software. So. So yeah, it was very pieced together. If we didn't have the ability to do it in that software, we had to, you know, find workarounds and still make the job happen. But. And then we were using a separate CRM, which I don't know if we'll get rid of that completely because. Used by our sales team, but it was just kind of another piece. And then we were using our financ. Our. Our QuickBooks software, which wasn't just used by our accounting team. It was being used by everyone to manage purchases.

## Moderator (00:13:33 - 00:13:34)

Sure.

## Ashley (00:13:34 - 00:13:49)

So hopefully we can really. Service trade will be our, our one main thing and then we can really have our accounting team only in QuickBooks, which is ideal for, you know, software. So.

## Moderator (00:13:49 - 00:13:57)

Yeah, that makes sense. And so post integration, it sounds like you'll have service trade, QuickBooks and then. And then the CRM. So what, what CRM is that?

## Ashley (00:13:58 - 00:13:58)

Salesforce.

## Moderator (00:13:59 - 00:14:10)

Salesforce. Okay, great. So you, you touched on some of the integrations like QuickBooks being really important to you. Are there other integrations that were primary considerations?

## Ashley (00:14:12 - 00:14:14)

No, those are the, Those are the main.

## Moderator (00:14:14 - 00:14:16)

Yep. The QuickBooks. Yeah.

## Ashley (00:14:16 - 00:14:55)

Yeah. Really? QuickBooks was a big one, especially for our, you know, the finance manager to just have that. Last thing you want to do is bring in a new software and then have to do, you know, double entry for things and almost for workarounds because that defeats the purpose of, you know, finding a new software to solve some problems. So QuickBooks was really the main one. I really wasn't focused on finding something that integrated with Salesforce just because it's a select group of people who use it for big reasons. So that really wasn't important to me. It was really. QuickBooks.

## Moderator (00:14:55 - 00:15:13)

Yep. Got it. In terms of the, the process. And you talked about, you know, you had. In terms of running the process you started the prior year and you picked it up back this year. So who is, who is all involved in, in the decision making process on which service provider you ultimately selected?

## Ashley (00:15:13 - 00:15:54)

It was primarily myself and then there was a little bit of, you know, buy in from our finance Manager Again, that QuickBooks piece, making sure that information flowed back and forth as needed. Our owner does work on site. We're, like I said, privately owned company. So he's here Monday through Friday 8 to 5. So he had a little bit of influence here and there. But it was primarily me that was doing a lot of the research, investigating all the fun demos and then decision making.

## Moderator (00:15:55 - 00:16:12)

Yep, it's quite a process. And that's actually a good segue to talk about how service trade stacked up to some of the other providers that you evaluated. So from your standpoint, what are service trade's strengths compared to some of the other vendors that you considered?

## Ashley (00:16:15 - 00:16:23)

So one thing I really enjoyed that was a lot different with service trade is the salesperson in particular.

## Moderator (00:16:23 - 00:16:24)

Okay.

## Ashley (00:16:24 - 00:16:52)

I didn't feel it wasn't pushy, I don't know better. It was just very genuine. You know, I think if I, I believe so. It's before we even had a demo. We just had a conversation and it was up front, you know, this is what we can do, this is what we aren't made to do and this is kind of how our costs are structured. So I really appreciated that because I felt like it respected my time.

## Moderator (00:16:52 - 00:16:53)

Yep.

## Ashley (00:16:53 - 00:18:20)

And also just gave me a clear expectation on, you know, this is what I can expect from service trade. But if I'm looking for it to do A, B and C, well, you know, that might not work here. So that's one thing I really liked. And then the second, it was just very direct. I mean, the second time I spoke with Chris was our salesperson out. The second time I spoke with him, you know, it was with a demo environment and he was showing me what we had talked about and showing me the workflows. So I really enjoyed that. And then another big thing for me was that although service trade has a ton to offer, it wasn't over the top with functionality and features. And I reviewed one software and they did all of the field service management portion, but then they did marketing and tracking your ROI and it was too much. I just need a software that's going into a really great job at field management, not, not my roi, not running my P and L in the software. So I really liked that with service trade and everything was just really direct. There wasn't any, I don't know. And then it was just like, okay, well here's the information. Let me know if you have questions. I didn't get a billion phone calls, you know, an email, follow ups, so I just really appreciated that. It was very direct.

## Moderator (00:18:20 - 00:18:34)

Yeah, that's great. Let's, let's explore that. The other side of that continuum. What are, what would you say are service trades weaknesses when you think about them relative to some of the competitors that you evaluated?

## Ashley (00:18:34 - 00:19:11)

I think the only thing I ran into was service trade during the process where I was like, man, I really wish I could, you know, get some more information or. So obviously as, as we've talked about, QuickBooks was a big deal for us and it was a major part of our, you know, finding the right solution. And I really needed to understand a little bit better on how service trade mapped with QuickBooks. And unfortunately, and again, it could have just been timing, circumstantial, all that, but the person who had been working for service trade and knew the most about QuickBooks had just left.

## Moderator (00:19:12 - 00:19:12)

Oh, okay.

## Ashley (00:19:12 - 00:20:00)

And so I wasn't able to get a lot of the questions that I had about QuickBooks and service trade answered. I was given a ton of, you know, resources to read and look at myself. But for a little bit there, it was a little nerve wracking because I was like, I hope you know, what I'm reading is I'm understanding it correctly before I sell the solution to the rest of my team. And it doesn't interface with QuickBooks the way that I understood it. So that was the big thing for me is that when it came to those specific questions or what I considered more basic questions about how to interact with QuickBooks, it was a little bit difficult to get more information and to get answers about how those two interfaced.

## Moderator (00:20:00 - 00:20:17)

Yep, understood. And in thinking about that QuickBooks, like the technical coverage in the sales process, were there any, any competitors that you evaluated that you felt that they did a good job of explaining the technical aspects of a QuickBooks integration?

## Ashley (00:20:17 - 00:20:51)

Yes, there were a few competitors. I think I looked at probably six in total. So there were a handful of them, I think three or four that was able to show actually alive during the demo how information flowed in real time between and the software. So that was really cool to see because QuickBooks, obviously I'm used to working in QuickBooks. And so to see that information in real time going back and forth, you're like, oh, this works. Like you're saying it works. One of them, it didn't work.

## Moderator (00:20:52 - 00:20:52)

Oh, wow.

## Ashley (00:20:52 - 00:21:09)

And so I was like, this doesn't work at all. And there were a ton of issues and you know, sometimes it's just the timing or, you know, bad timing, I don't know. But it was almost like, okay, well if we do go that direction, let's really do our due diligence, you know.

## Moderator (00:21:09 - 00:21:10)

Right.

## Ashley (00:21:10 - 00:21:11)

So.

## Moderator (00:21:11 - 00:21:17)

Yep. Do you recall maybe the one or two that, that did it really well in the, in the technical overview?

## Ashley (00:21:17 - 00:21:23)

Yes. So it was, I believe they were called Operx.

## Moderator (00:21:23 - 00:21:24)

Okay.

## Ashley (00:21:24 - 00:21:47)

That, that was able to show that live. And it was, it was really cool to see. And then the other one was Field Pulse which operates. We did end up eliminating pretty early on just for unrelated reasons. But then field polls we ended up not moving forward with and we evaluated them pretty heavily.

## Moderator (00:21:48 - 00:22:00)

Great. Now you've touched on, you know, your, your sensitivities and your criteria throughout the call. So was there an ultimate deciding factor that led you to service trade?

## Ashley (00:22:03 - 00:22:12)

I hate to be so redundant, but it was really how. Well it was really how it mapped with QuickBooks, the customer functionality of it.

## Moderator (00:22:12 - 00:22:12)

Yep.

## Ashley (00:22:13 - 00:22:34)

So we had a really hard time finding a software that would map our customer information the way we needed and service trade did it does it perfectly. And then I would say, I would say the second, which is super general and broad, but it's just the user interface and.

## Moderator (00:22:34 - 00:22:34)

Okay, great.

## Ashley (00:22:35 - 00:22:45)

How simple it was and is to navigate around in service trade was another, another big factor for us.

## Moderator (00:22:45 - 00:22:46)

Great, that's helpful.

## Ashley (00:22:46 - 00:23:00)

And something else mentioned too is the. Is the. Which I haven't learned a lot about it yet. I'm excited to learn more and to use it in real life. But is the. The BI abilities?

## Moderator (00:23:00 - 00:23:01)

Oh yes.

## Ashley (00:23:01 - 00:23:18)

Within service trade. So I did not look at all the other ones I had looked at. Did not have that in depth level of reporting. And that was something that was a really big buy in with our owner. Was. Okay, have the, the, you know that information.

## Moderator (00:23:19 - 00:23:33)

Yep. That's interesting. So on the bi. Was that something that came up? Did that become a factor during the sales process or was that a consideration going into the process?

## Ashley (00:23:33 - 00:23:52)

It was not going in. It was during the process when we learned that I think actually in the first or second demo we learned that service trade had that ability and so. Or that to offer. And so then we really started to look at. To look at adding that in.

## Moderator (00:23:52 - 00:24:08)

Yeah. Well, that's a nice discovery. Yeah. So want to, you know, take it to the home stretch here and lastly, focus on some of your interactions with service trade sales team. So how did you, how did you first find out about Service trade just.

## Ashley (00:24:08 - 00:24:09)

Through a Google search.

## Moderator (00:24:09 - 00:24:11)

Oh, really? Okay.

## Ashley (00:24:11 - 00:24:54)

Google search. I think I came across them in October, which I was. I started my search in July, so I was four months in. So I, like I said we and which I mentioned them before, Field pulse. We. I thought, yes, this is it. We were going to move forward with it. Then we realized that it didn't interface the way that we needed it to fully. There were some, you know, big things it didn't do that we needed, that we discovered. And so four months in, I was like, oh my gosh, I have to start this search all over again. And so through a Google search, I found service tree.

## Moderator (00:24:54 - 00:24:59)

Yeah, that's great. So what would you say the sales team did? Well.

## Ashley (00:25:00 - 00:26:03)

So I think that, you know, kind of some of the things that I had mentioned a moment ago, just working with them, they were super responsive, they were super knowledgeable. If Chris didn't have the information, you know, like, even with the QuickBooks stuff, although he didn't have the information, he didn't quite have anyone to point me to since the person had just left. But he did send me as many resources I needed or requested about QuickBooks. He was still happy to try and answer any questions that he had his ability in that regards. But he was, he was just really knowledgeable. There were a couple of times where I had to kind of reschedule on him. He was super flexible, which I appreciated. And then everyone with the sales team that I spoke with during the, you know, discovery process just seemed very honest and genuine. Something else that they did was they set us up with a current user.

## Moderator (00:26:03 - 00:26:04)

Okay.

## Ashley (00:26:04 - 00:27:08)

And that was also very different than we had asked another. Another software if they had any references that we could talk to. And it was like crickets. I don't think they ever really got it, which I was already kind of a little nervous to ask because that can be kind of a weird ask, like customers I can talk with, you know, but they were super open to it. And immediately after that call, I think it was next day, they sent over contact information for someone and we were able to set up a call with them. And I think for like a little over an hour, we just talked about what they liked, what they didn't like, how they use service trade in real life. So that was really cool that, you know, that was something that they were able to. To offer and to do so. Overall, the sales, the sales personnel I interacted with were all very friendly. They were all very knowledgeable. None of them were pushy. It was just very genuine.

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

Yeah, that's great. Now you mentioned the, the, the customer referral. Why was that, why was that important to you?

## Ashley (00:27:17 - 00:28:21)

So that was actually super. One of the things that was super important to our owner was I, they. He had an experience years and years and years ago, I think, like seven, eight years ago, where they were looking at a solution and they actually went and talked with a current customer and the solution did not work at all. So for him, he was like, I want to. So I guess. And obviously they didn't move forward with that solution. But so now when we were doing this search, he remembered that and so he was like, well, if we move forward with someone, I want to talk to a current user about it. So it was a really big deal for him, I guess, just to have, you know, real life insight. Sometimes in a demo environment, of course, you know, for the most part the software is going to look great and do everything that you need and want it to do. And then in real life, you know, it doesn't work or it's slow, clunky and so that was a big deal, I guess, to find out those pain points not from a salesperson.

## Moderator (00:28:22 - 00:28:29)

Yeah, that's savvy due diligence there. Yeah. What would you say, what would you say the sales team could have done better?

## Ashley (00:28:34 - 00:29:45)

Could have done better? I don't know. I mean, other than what I mentioned a moment ago with quickbook stuff, I don't know that there really is anything. Yeah, I mean, during the. More recently, I don't know if it's sales team directly, but, you know, we kind of got a little bit forgotten about for a moment for a couple of weeks. Our implementation, you know, started on 12:1 and it was the holidays so we hadn't heard from anyone. So we did get a late start there after I reached out, out to Chris, like, hey, I haven't heard from anybody but honestly, I mean, I don't know that they could have done anything better there. Yeah, I don't, I don't know. I honestly don't know. Yeah, everything was a really good experience thus far. I mean, even as we started the implementation, the rest of the personnel that I've met from their data team and project managers, they've all been really great, so excellent.

## Moderator (00:29:45 - 00:29:52)

You know, last question is around implementation. So how far along are you in the implementation?

## Ashley (00:29:52 - 00:30:04)

We're pretty much at the beginning right now we are getting over all of our data to them and so we kind of just started here. We're a couple weeks in.

## Moderator (00:30:04 - 00:30:09)

Okay, great. Any, any early observations around Positive aspects of it.

## Ashley (00:30:10 - 00:30:30)

Yeah, positive. It's. Everything is just really easy. They provide a, like a Journey Dashboard, which is really appreciative. It's really nice to be able to see, okay, here's all the tasks I need to get accomplished to try and, you know, make this successful and keep it on time, or if I don't get them accomplished and it's not on time, then, you know, I have a list of why.

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

Yes. Yeah, there's an impact.

## Ashley (00:30:32 - 00:31:15)

Make it happen. And so that's something I think is really cool. And then I've met with both the project manager a couple times and then the data immediately they set up reoccurring meetings. So that way, you know, everything stays flowing smoothly, which I appreciate. So they each laid out, you know, their roles as well as expectations, which I appreciate. So, yeah, those were definitely some positive. Some positive aspects. I really like Journey Dashboard because I can log on at any time and say, okay, here's what I need to work on today, this week before I'm speeding, whatever that looks like.

## Moderator (00:31:15 - 00:31:24)

Yeah. Good visibility. Were there any. And it's early on, so any negative aspects of implementation to this point or any concerns?

## Ashley (00:31:25 - 00:32:24)

No, the only. Well, I'll mention one thing. The only thing which I learned earlier this week that I did not learn in the Discovery demo decision making phase of. Of service, you know, deciding to adopt service trade that I wish I would have learned more about is that our work history, so all of our current history, none of that will move over, which I understand logistically why that wouldn't be a good idea. But I was like, man, how are we going to internally make that transition with current jobs and open work orders and yes, to go back out to a location that we've been to a billion times, how are we going to know who was out there last and what they did? So that was. That's really the only thing. And there's workarounds. It's not like a, oh, my gosh, what am I gonna do? But it was kind of like, oh, man, I didn't realize that. I wish I would have known that.

## Moderator (00:32:24 - 00:32:40)

Yep. Okay, very good. Well, Ashley, we're right at our time. I feel like we've uncovered so much great information. I'm sure service trade is going to be very happy with our report. So thank you for all of your candor and your time. We really appreciate it.

## Ashley (00:32:40 - 00:32:42)

Absolutely. Thank you.

## Moderator (00:32:42 - 00:32:43)

All right, have a great day.

## Ashley (00:32:43 - 00:32:44)

You too. Bye.