Speaker 1: Cool. Yeah, she was also on the line for it.

Speaker 2: Okay, awesome. Well let me just start by asking, do you mind telling me just a little bit about your business? Tropical? How many technicians are at Tropical Pool?

Speaker 1: You don't.

Speaker 3: Hi, was it? Okay,

Speaker 2: So we have about four technicians. Got it. And does Tropical, what's the mix between how much of the business is projects versus service contracts?

Speaker 1: Service project 90, 85% service and direct project.

Speaker 2: Okay, great. And that adds out of those four technicians. And did you guys recently evaluate field service management tools like Servicer?

Speaker 3: Yes.

Speaker 2: Great. What were you hoping it would accomplish and what were you using before?

Speaker 1: We've been using House Call Pro and we're using QuickBooks and stuff like that.

Speaker 2: Got it. And why were you looking for a new vendor or a new tool for you?

Speaker 1: So one of the things that we just signed up for, it's AR one, which is text message marketing. They integrated into House Call Pro, but I guess they're wanting us to house Call Pro is trying to say that we have to upgrade in order for it to integrate properly. And so instead of having to help multiple different platform to work off, but we just wanted an all in one kind of thing that we could just integrate it with.

Speaker 2: Yeah, that makes sense. Who are you looking at besides service trade? So

Speaker 3: That's it.

Speaker 2: Okay, cool. And you mentioned all in one solution was the goal. Did you have any key for yourselves as you evaluated the options?

Speaker 1: Not really that I know of.

Speaker 2: Okay. Yeah. Well you mentioned integrations or you mentioned QuickBooks. Were there any other integrations that were really important to you?

Speaker 3: Yes. Lemme see what it's,

Speaker 1: So it's the sorry RP one that we use, which is the text messaging that I was saying earlier that integration to House GoPro. But like I said, there's different things that we have to do in order for it to smoothly integrate. So.

Speaker 2: Sure. Is RQ one the name of the business?

Speaker 1: Yes.

Speaker 2: Got it.

Speaker 1: Yeah, it's like a company there.

Speaker 2: Yeah. I'm trying to find them online. I'm not seeing it. Let's see. See Jet Fuel, RP one is a highly refined form of kerosene.

Speaker 1: Yeah, they have a little rocket for their, oh

Speaker 2: There we go. Cool. Okay, thank you for sharing that. And so can you share any feedback from your time talking to Service Trade positive and negative?

Speaker 1: Personally, I have never talked to Service Trade.

Speaker 2: Okay.

Speaker 1: I, yes. Officer, when service the CM platform that we're going interview, we Okay. I think I'm remember it now. It's been so long. Is it okay. Give me a ring back tomorrow afternoon. I be more free tomorrow.

Speaker 2: Okay. I can call you tomorrow.

Speaker 1: Yeah, if

Speaker 2: You don't mind. Yeah, I don't mind. I appreciate the chat so far. Do you have a time just so I want to disrupt you as little as possible is like

Speaker 1: The later the better.

Speaker 2: Okay, sounds good. Yeah, if you don't mind. No problem. Alright. Thank you so much. Thank you guys. Have a good day.

Speaker 3: Yes sir.

Speaker 2: Bye.

\*\*Win/Loss Summary for Tropical Pool: Insights and Key Learnings\*\*

\*\*Introduction\*\*

This summary highlights the key points from the conversation with Tropical Pool regarding their evaluation of field service management tools, specifically Service Trade, and their experiences with current solutions.

### 1. Business Overview

- \*\*Technician Structure\*\*: Tropical Pool operates with a small team of about four technicians.

- \*\*Service vs. Projects\*\*: The company primarily focuses on service contracts, with approximately 85-90% of their business coming from service rather than direct projects.

- \*\*Quote\*\*: “We have about four technicians... 90, 85% service and direct project.”

### 2. Current Tools and Pain Points

- \*\*Existing Solutions\*\*: They are currently using House Call Pro and QuickBooks for managing their operations.

- \*\*Quote\*\*: “We've been using House Call Pro and we're using QuickBooks and stuff like that.”

- \*\*Integration Challenges\*\*: There is an ongoing challenge with integrating a new text message marketing service (ARQ One) with House Call Pro, which is leading them to seek a more streamlined, all-in-one solution.

- \*\*Quote\*\*: “...they're wanting us to [upgrade] in order for it to integrate properly...we just wanted an all in one kind of thing that we could just integrate it with.”

### 3. Evaluation of New Solutions

- \*\*What They Seek\*\*: Tropical Pool is looking for a field service management tool that can easily integrate with their existing systems and provide comprehensive functionality.

- \*\*Competitor Consideration\*\*: They mentioned Service Trade as their primary option, with no other solutions currently being considered.

- \*\*Quote\*\*: “So, who are you looking at besides Service Trade? ...That's it.”

### 4. Key Integration Requirements

- \*\*Critical Integrations\*\*: Integration with existing services is paramount, particularly ARQ One for text message marketing. They expressed additional needs for compatibility that are yet to be met.

- \*\*Quote\*\*: “...integration to House Call Pro. But like I said, there's different things that we have to do in order for it to smoothly integrate.”

### 5. Feedback on Engagement and Experience

- \*\*Lack of Direct Communication\*\*: The speaker (representative of Tropical Pool) noted they had not previously interacted with Service Trade directly, which may impact the evaluation process.

- \*\*Quote\*\*: “Personally, I have never talked to Service Trade.”

### 6. Next Steps

- \*\*Continued Dialogue\*\*: The conversation ended with a request for a follow-up chat, indicating an openness to further discuss their needs and experiences, and potentially continue the evaluation process.

- \*\*Quote\*\*: “If you don't mind, yeah, I don't mind. I appreciate the chat so far.”

### Conclusion

Tropical Pool is currently looking for a streamlined, integrated field service management solution. Their primary concerns revolve around integration capabilities with existing tools (particularly House Call Pro and ARQ One) and the clarity of communication with prospective vendors like Service Trade. The insights gained from this conversation suggest a potential opportunity for Service Trade to highlight its integration strengths and foster a closer relationship with Tropical Pool, while addressing specific challenges they face.

### Recommendations for Strategy

- \*\*Highlight Integration Strengths\*\*: Emphasize the robust integration capabilities of Service Trade with commonly used tools in follow-up communications.

- \*\*Engage with the Client\*\*: Proactively reach out with tailored solutions addressing their specific integration needs, demonstrating understanding and responsiveness to their stated challenges.

- \*\*Gather More Feedback\*\*: Ensure to gather feedback on any interactions with Service Trade to refine offerings and improve customer satisfaction.

This structured overview can serve as a basis for developing a presentation to share insights and recommendations with the client.