



Bob & Clint | ServiceTrade Follow-up Call

Clint Mathis with University Mechanical Contractors, Inc.
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Participants

SERVICETRADE

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Topics

<i>ST app contracts and pricing</i>	2:45
<i>Access to information</i>	4:49
<i>Paper process</i>	5:31
<i>Quoting</i>	6:17
<i>Purchase decision</i>	8:29
<i>Purchase decision</i>	10:13
<i>Type of work</i>	11:16
<i>Purchase decision</i>	13:55

Transcript

"This English transcript was generated using Gong's speech-to-text technology"

CLINT

0:00 Hey, there.

LAUREN

0:01 Hey.

CLINT

0:03 Yeah. When you ask that or whatever, I have to look back at the, on it.

LAUREN

0:09 No worries.

CLINT

0:13 Good morning.

LAUREN

0:15 I'll see.

CLINT

0:17 You'll...

LAUREN

0:19 Probably gosh. I forgot you're heading to that event?

CLINT

0:23 Yeah.

LAUREN

0:24 We'll talk about it in a minute.

CLINT

0:26 Yeah.

ROBERT

0:28 She's...

ROBERT

0:45 Hey, guys... you doing?

CLINT

0:51 Can't complain rocking and rolling? Just another busy morning. I'm in the airport, the head of Portland for an event. So, always moving and shaking.

ROBERT

1:02 Getting a little smoke down there or not so much yet?

CLINT

1:07 I have, I haven't seen any, what's going on.

ROBERT

1:12 There's a bunch of wildfires up in Canada. We're getting for the last few days. We've been getting quite a bit.

LAUREN

1:18 Now.

CLINT

1:19 Well...

LAUREN

1:20 The wildfires and Bam, or is that something different?

ROBERT

1:24 There's like 91 wildfires going around in BC right now.

LAUREN

1:29 That's so wild.

ROBERT

1:33 Super early for a fire season.

CLINT

1:36 Exactly. Well, I hope it doesn't trickle all the way down here because it's never pretty down here during fire season.

ROBERT

1:43 Yeah. It was a rough one at least in my area last summer or last fall. So, it'll be.

CLINT

1:52 Yeah. And one thing that worries me is we've had so much rain here lately that all of the wild flowers and like where I live, especially whatever you'll see it all brown in the hills and everything. Normally, it's all green and overgrown. So, I'm just hoping when that drives out that this stuff don't cause worse damage than it normally does.

ROBERT

2:13 Yeah, exactly.

CLINT

2:17 Well, good. I know that you were going to meet with your team internally. Also, I know that you talked with Patrick that was so funny. He talked to Patrick the other day about the Northboundary stuff as well. So, I just wanted, to see and get kind of what your team's feedback was from our trip when we got to visit you.

ROBERT

2:35 Yeah. I think, it was good. I think the thing that, we came up with is we need to do a deeper dive on a few things.

--- *ST app contracts and pricing* ---

ROBERT

2:45 And so the first one is the contracts setup, looking at the details of, you know, how we would actually set up a contract. You know, our contracts get pretty intricate with, you know, three or 400 pieces of equipment at times and, you know, different task lists that get associated at different times of the year and different parts.

--- *ST app contracts and pricing ends* ---

ROBERT

3:17 Sometimes filters are required on a unit. Sometimes they're not in the unit right next to it could be completely different. So they can get, it gets pretty intricate in terms of the setup. So that's one thing. And then the dispatch board is something they wanted to take a deeper dive on... and then tasking. So, how does tasking actually get handled? What does the technicians see in the field? How do we set up the tasking? Because I think it's a little bit unclear in everybody's mind right now, what that process kinda looks like and how the software displays it, what the tech would actually see. And then the last thing I think is talked a little bit about this in the presentation or in the meeting about like a workflow rules module. And it sounds like you guys don't have a module per SE... and it almost sounded a little bit more custom in terms of, hey, we need to get an alert, you know, if this and this then do this... you know, a lot of the products we're looking at have a workflow module where you can set up those different workflow rules and alerts. And it just, it felt like from what you guys have, it's more of, hey, talk to us and we'll see if we can set that up for you.

--- Access to information ---

LAUREN

4:49 Can you remind me if the workflows, are specific to admin users or field users or both? I can't remember.

ROBERT

5:01 Well, typically the workflow rules on the software that I'm familiar with, you would set it up as an admin, but you would do it for all types of things.

--- Access to information ends ---

ROBERT

5:12 It could be setting things up for what happens to a call on a dispatch board. If it's been sitting for too long, then you set up a workflow rule to do, you know, send out an alert to a dispatcher to let them know that, hey, this call has been sitting for too long or... you know, you can have work flow rule alerts for billing issues.

--- Paper process ---

ROBERT

5:37 If you have a completed job that's been sitting for too long, the challenges when you're you know, if you're just writing reports and trying to send people reports about, hey, you've got this many jobs that have been sitting in a queue for too long that are completed but are ready for billing, right?

--- Paper process ends ---

ROBERT

5:54 So I think it's more immediate and more effective to have workflow rules setup that actually send alerts on different things, and keep things moving through the system.

LAUREN

6:05 Okay. I understand. Let me, let me think on that... as you're right? That's just not something that's like truly native to service trade.

--- Quoting ---

LAUREN

6:17 It may be something that we're working on. I know there's some aspects of, that are coming down the pipeline. I know specifically on the, from the quoting perspective or we're starting to create more automation around like different settings on like if the quotes then, you know, on approved for X amount of days, then we'll send them alert kind of thing.

LAUREN

6:41 So I think that may actually be addressed on our road map, but I'll wanna talk with the right people before we do that. But that's definitely a conversation we can have.

ROBERT

6:53 Yeah, thank you.

LAUREN

6:54 For indulging me.

ROBERT

6:55 Usually, like I said, it's there's a separate module within a system on the admin side for setup where you can program all the different alerts that you wanna do.

LAUREN

7:07 Yeah. There, there are some like alerts and notifications settings, but I don't think they're as extensive as what you're imagining. So, so I'll do some research into that, but I think a deeper dive on contract, set up the dispatch board. That is also something that is on our road map, to undergo some improvements in the second half of this year. So maybe we'll take a peek at that. And then of course, the tasking, the new dispatch stuff is really cool. That's really cool.

ROBERT

7:41 Good.

LAUREN

7:43 What, what other observations did your team share? Other than like the things they wanted, to have more context on, what were some of the things that were pretty well received? Would you say?

ROBERT

7:57 I think overall, I think people like the user interface and they liked... just that, that's kind of purpose built for the service industry and... some of the features you got built into it for quoting and the customer portal, that type of thing.

LAUREN

8:24 Yeah.

ROBERT

8:25 I think people were pretty comfortable with that side of it.

LAUREN

8:29 Okay. Good stuff. So would we need to coordinate through you? Some of those follow up sessions? I imagine not all of them are gonna include everyone but a lot of them will, what are your thoughts on that? What's your vision?

ROBERT

8:45 So, I think, yeah, probably coordinate it through me. And then what we'll do is we'll set up whatever time slot we need and then I can have different people attend for different parts of the.

LAUREN

8:57 Okay.

ROBERT

8:58 Time.

LAUREN

9:00 Okay. Maybe. So like one one long meeting and then kinda broken out into, yeah. Okay. Yeah, yeah. Okay.

ROBERT

9:07 That way it's not chopping it up for you guys and, you know...

--- Purchase decision ends ---

LAUREN

9:10 Yeah, we can probably accommodate that. I'll just have we'll have to do some calendar coordination with, some folks, from the dispatching standpoint, some of the new hotness we'll need to leverage our product team. And then the contract, that will likely be 10. So we'll have some to coordinate, but we'll start looking into time. Probably next week would be a tall order, but maybe until the following week, we'd have more openings on our schedule. So we'll send over some times.

ROBERT

9:45 Okay.

LAUREN

9:46 For the following week which I believe is memorial day week. There may be people out, but we'll see what we've got. Okay, week of may 20 ninth question mark. Sorry, Clint, I kind a steam rolled you. I know you had some questions for Bob too.

CLINT

10:06 No, no, no, I mean, this is all good stuff. This is, I wanna make sure I was finding out really what, the feedback was.

--- Purchase decision ---

CLINT

10:13 You know, what we needed to do as far as, you know, accomplishing answering your questions. Obviously from both standpoints, we wanna keep the ball rolling and moving forward to get to, the end goal. And that's you know, being able to make a decision, and being able to make sure that we're answering all your questions. So you feel comfortable and your team feels comfortable about what we're presenting and, you know, hopefully partner up in that regard. So, yeah.

ROBERT

10:36 I think some of it's gonna depend too. So, I mean, we're looking at other products. And as we're getting, the demos, people are coming up with other questions. I, we may come back with some additional questions and, you know, features we've seen on other systems and.

CLINT

10:52 Would you be, would you be willing to share who you guys are looking at? Just curious?

ROBERT

10:59 Yeah, I can do that. So... pull up here to see if I can.

--- Type of work ---

ROBERT

11:16 So we're looking at Simpro.

CLINT

11:21 Some...

ROBERT

11:22 Service tighten. Obviously, they're designed more around residential but it looks like they're making a big push on commercial and, you know, kind of getting the products setup for the commercial side... looking at, we looked at a product called mobile work, but I think we've probably taken them off the list.

--- Type of work ends ---

CLINT

11:46 That.

ROBERT

11:49 Looking at one soft or key to act ifs?

CLINT

11:56 Yeah, quite a few of them.

ROBERT

11:58 We've we've kind ruled out probably by looks like maybe six different ones. We rolled out like FieldEdge and potentially, we're gonna keep looking at BuildOps although I'm not totally sold on them right now.

CLINT

12:20 Gotcha.

LAUREN

12:22 The only thing on that list that... seems like an outliers win. So tack, I thought that product was being sunset.

ROBERT

12:31 Well, they rebuilt it. So they sold the company, I believe back to hide, got sold back to wensoft, I believe.

LAUREN

12:40 Yeah.

ROBERT

12:41 And... the thing I don't like about it, it's built on the Microsoft dynamics back end. Yeah... pretty certain. I'm not going there again. Been there seeing it, done it the CRM side.

LAUREN

13:02 Got it. All right.

ROBERT

13:06 Yeah. At this point, we soft is actually key to act is actually kind of a yellow column like not likely. And, I, on, so for a long time, I knew Dick winnagar when he developed the product back in the day, when he was.

LAUREN

13:23 Wow. Yeah. I, most people are trying to get off of it... right now. I think, the, I think most recently costco fire down there in tail there, they just moved off of that in favor of service trade.

ROBERT

13:45 Yeah. It to me, it doesn't look like they're really investing in the product. And yeah, it's not long term. I don't think.

--- Purchase decision ---

LAUREN

13:55 Sure. Well, you've given us some good direction on what we need to do. So we have our marching orders, Clint. Did you have any other questions or Bob, did you have any other questions for us?

ROBERT

14:08 I don't think I do right at this time.

CLINT

14:11 I think, the last thing obviously, since I know that you're looking at these other companies and stuff, has the timeline changed or anything like that moved up or pushed back or anything like that? Or if you guys determined, fine. Hey, we're gonna make a decision by this particular time.

ROBERT

14:28 No, we're not trying to rush it. We're trying to get through it as fast as we can but we also don't wanna make the wrong decision because we're looking at just kinda like a one to three year horizon. I'm looking more at like a five to seven years, you know, where are the products going, and...

--- Purchase decision ends ---

CLINT

14:50 Are they going to continue to develop to, you know?

ROBERT

14:53 Yeah. I mean, how much is being invested, in the different products? And, you know, what's the future look like? And are there private investment firms that are... you know, jumping in, and trying to improve the product? Or is it all just, you know, kinda... you know, kinda build it as you go products.

CLINT

15:24 Okay.

LAUREN

15:26 Certainly. Speak to that. We've actually just implemented like a public facing... roadmap. So, we've got our road map planned out for the next like I would say 12 to 18 months. So, we can definitely cover that, in a future meeting.

ROBERT

15:47 Okay. Yeah, that would be good.

LAUREN

15:54 Okay.

CLINT

15:55 Cool. Yeah, just plan on, I'll get with Lauren and obviously our internal team to look at, some days and times and I'll shoot you over an email that way you can get with your team and be like, all right. Yeah, these were good. These, the type of thing and then we'll narrow it down and get together.

ROBERT

16:15 All right. Sounds good.

CLINT

16:17 I really appreciate your time this morning, Bob. Thanks for joining early. Had helped me out as far as the flight, so worked out. Perfect. Thank you so much.

ROBERT

16:25 All right. So, you guys.

CLINT

16:26 Take care guys.

ROBERT

16:27 All right. Bye.

LAUREN

16:28 Bye.

The End