



ServiceTrade Review

Logan Engel with Jackson Mechanical Service
Recorded on 7/13/23 via Zoom, 27 min.

Participants

SERVICETRADE

Logan Engel
Account Manager

JACKSON MECHANICAL SERVICE

Jimmy Wood
Senior Sales Executive

Topics

<i>Call Setup</i>	0:01
<i>Call Setup</i>	4:43
<i>Small Talk</i>	21:26
<i>Wrap-up</i>	26:49

Transcript

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--- Call Setup ---

JIMMY

0:01 Hey, Jimmy. Hey, Logan.

LOGAN

0:03 You doing?

JIMMY

0:04 I'm doing well, sir. Sorry, I lost track of time to be honest.

LOGAN

0:09 No worries. I was actually about to shoot you over an email. So perfect timing. Well, cool. How's your day been very?

JIMMY

0:17 Very busy, sir, very busy. I just had to get shut my door here real quick. I... got on or not. Here we go. There we go.

LOGAN

0:29 Perfect. All righty. So let's see here and my apologies on the invite, I need to set it up so that it says, our Northboundary review. And that way it's not just service trade kind of thing. Are you familiar with, you know, service trade, acquiring Northboundary and whatnot? Okay. Cool. Well, sweet. What I want to do is basically get to know you get to know how you all use Northboundary, and really use this as an introduction meeting since I will be your account manager here for Northboundary and yeah, answer hopefully be able to answer any questions you have. If not, I can definitely find the answers out for you. So, yeah... if you wanna start and just kinda tell me what your title is, what your roles are. And I know most of the time in these industries, you're wearing multiple hats, it's not just one specific role.

JIMMY

1:31 Let's say you're exactly right this week. So I'm the estimating manager for Jackson. Okay. So all of the estimating that's done for the entire company comes through me... and I'm overseeing all that approved the quotes, reviewing all of that. I do estimate on my own. Also, I'm actually this week, I've been helping with service management also because our service managers out. So yes or lots of hats this week. But currently, what we're using Northboundary for is all estimates whether it be

project maintenance service, all of that. So all the estimating, done in Northboundary, I believe outside sales, which is a different division. I'm not over that, that's its own home manager and all that they're also using the CRM side of Northboundary or tracking leads and all that kind of stuff. But again, I'm not involved in that. So I let them do their own thing... but that's pretty much what we use Northboundary.

LOGAN

2:41 Perfect. And I'm a note taker. So if I pause.

JIMMY

2:45 You're fine.

LOGAN

2:46 Cool. Sweet.

LOGAN

2:53 Sweet. So in meetings similar to these even, will I always be meeting with you or will there also be someone else that I might meet or join?

--- Call Setup ends ---

JIMMY

3:02 It would be?

LOGAN

3:04 Perfect. Awesome.

LOGAN

3:09 See, perfect. Okay. And let's see here full. I had another question for you off the top of my head and I blinked. So you said that you all will use this for estimating in a lot of areas including the service side of things.

JIMMY

3:29 Yes.

LOGAN

3:30 Okay. But do you know what? I know? It's a whole different ball game and department, but do you know what your service departments using for like everything outside of the estimating and quoting?

JIMMY

3:41 We're in we're in BuildOps.

LOGAN

3:44 Okay. I am familiar with Bill ups. Okay?

LOGAN

3:51 I just like to get a good idea and feel for pretty much the whole company. I even ask my service trade customers. What are you using? You know, on the other hand, sure, it gives me a good idea. I like to organize it out in my brain kind of like a chess board in a way and just understand even if I won't ever talk to that person or that area of the business. I just like to know. So cool. And then let's see you'll have a renewal coming up in August. Sorry, the math in my head was not mating August 30 first. It looks like what I want to do is get you that pricing. I thought I had it, but I don't off the top of my head, so I apologize for that, but I can get that to you by tomorrow.

--- Call Setup ---

JIMMY

4:43 Is it going?

LOGAN

4:46 I don't know, I need to verify, I need to find it on the list. Long story short. So I don't want to be you and say yes or no until I have it and, you know, but yeah. So I will reach out to you if not in the day today, then definitely, by tomorrow, what is your schedule look like for even just a phone? Would you rather be a phone call or another Zoom meeting? Because I'm fine with whichever.

JIMMY

5:13 Either way... calendar wise, let's see.

JIMMY

5:22 I'm good today and I'm good. Tomorrow next week is super busy.

LOGAN

5:26 Cool. Yeah, I'll definitely give you a ring between, you know, today and whatnot what I'll do is give you a call with what I find out. And then if we need to hop on a call, we can totally hop on one. I've been in back to back meetings today, but this is my last meeting other than like internal meetings that I'll have. So I have some time between today and tomorrow if we need to hop on an actual meeting. Sweet. Okay. Now, what questions did you have for me?

--- Call Setup ends ---

JIMMY

6:01 One, I wanna make sure that I am on the like any kind of improvements. So have software enhancements, anything like that comes out for, because I get nothing. So, I had here recently, there was some requests that I had for improvements. I had a

whole another Zoom meeting with somebody else and we went over all that. And so, they put in the request and she had actually showed me some stuff that released. I was not even aware of. So I don't even know anything new that's coming out. You know, I get, there may be stuff in the works that's not what. I'm wanting to stuff to, hey, we just released this, you know?

LOGAN

6:42 Right. Okay. Yeah. So I made sure, in the tool that I use, I made sure you have the right roles assigned to you. So that anytime a marketing email for new releases come out trigger that it pulls you and you get a copy of it. It'll look like it came from me, but it's like a really nice kind of marketing email. I am not aware of any that have come from Northboundary yet. However, I have been in and out of the office. So that could just be something that I missed when I was out, but I do know I made sure that you have the right roles assigned when we spoke via email. So you're good to go there. What I can... do, you know, who you recently met with? Who showed you?

JIMMY

7:30 Release EPA? Okay?

JIMMY

7:55 Have to go back and look at my.

LOGAN

7:56 It might be Pam and Morgan. Now that I think about it. It could have been her.

JIMMY

8:04 I know it was a female. I do know that I was looking.

LOGAN

8:06 She was she, blond?

JIMMY

8:09 At, I can't I don't remember.

LOGAN

8:11 I gotcha.

JIMMY

8:13 Let me just second in my calendar.

LOGAN

8:16 Yeah, yeah. No worries. Take your time. I'm looking up something real quick for you.

JIMMY

8:26 Train... in June.

JIMMY

8:37 Yes, it was payable.

LOGAN

8:39 Okay. Yeah. Okay. Let's see shoot.

JIMMY

8:44 That was, that was on June the eighth.

LOGAN

8:47 Okay. Yeah, she is awesome.

LOGAN

9:08 All right. Give me one second. I'm gonna share my screen and show you something that I'm putting together for my customers here.

LOGAN

9:21 Perfect. So let's see here. Excuse the 1,000,000 tabs that I have open. I am... trying to clean them up but it's a never ending game. So here, I have a Mutual action plan. Basically, it's just a working list Google doc for us to go off of and stay organized. The more we talk, what I'm gonna do is share this with you and make you an editor so that you can add to it if you want to. If you don't that's fine. But just so you know, it's there. I'm gonna pull this up on any meetings that we have. Just so I have something to kinda revert back to and especially during busy season as we fill this out. It's really easy to forget about, you know, lose focus on the goals and things that we talk about because other things more important things that are more urgent and forefront occur. But yeah. So on here, I will have your sales users listed right now. I don't I apologize for that, but that will be listed. Do you know off the top of your head how many sales users you'll currently have?

JIMMY

10:27 On estimating is one two.

JIMMY

10:36 Six... six, six actual estimators, three outside sales. I mean we have a ton of users in or not everybody. Some people are just in there that go by just to look at information. They don't ever enter anything.

LOGAN

10:55 Gotcha. Okay. That's cool with me that way. It just gives me a ballpark but I'll clean that up a bit for us and whatnot. But what I'm gonna do is share this with you,

feel free to add to it any topics that we discussed such as for example, if you know, new releases come out and whatnot, we meet and talk about them, I'll throw them in here. Any goals and path forward that you have. For example, one of my customers wanted to grow his sales user team by. I think it was like two or three more sales users by the end of the year that's something that doesn't necessarily have to do with us specifically, but I do love to track them because it's really awesome when those goals are met. I've had several customers already hit some of their goals and then they don't even realize or remember that it was on the goal list until I bring it up and they're like, yeah, so it's little things like that. So also any support reach out that I should be aware of, feel free to throw them in here. I wanna stress that I am not trained in support at all, but I do like to be aware of what's going on if it's you know, urgent and, you know, so to speak, if it's minor like, hey, how do I do this? I don't necessarily need to know about that support ticket, but feel free again, throw in whatever you would like here. Any questions that you have for me, feel free to first of all, feel free to email me or call me if it's urgent... or tech support, of course, if it's more of a support question. But if you have a question where you just don't want to forget it for our next meeting. But you don't really need to know the answer right away. Feel free to throw it in here in this table. And I'm gonna push this down because the format gets funky. And then down here, this is going to be the miscellaneous area. I've been using this on this call so far? Just taking notes about you all, but yeah, you feel free to throw in anything in here. Any, any additional questions or anything that just doesn't fit in these other boxes? Also I do want to highlight and I will actually literally highlight it. It's there supports email that way, you have access to that at all times, just because I am typically in back to back meetings. So if, when you email me, it could be quite some time, several hours before I can get back to you and even then I may not know the answer and you may have to go to support anyways. So instead of waiting that long and then being told go to support, I'd rather you already have what you need.

JIMMY

13:36 Yep. I've already got it now. I've actually that's how I got with Pam, I believe.

LOGAN

13:41 Perfect. Awesome. Sweet. Well, cool. Yeah.

JIMMY

13:46 You're not gonna really hear from me much just because we, I mean, we're completely up and running. We don't really have much questions. So you don't hear much from me?

LOGAN

13:58 No worries. Thank you for the transparency. I'm one, I'm always here for you and I don't take hard filings for, you know, especially if you're busy is good. So no worries there. I'll reach out if I, you know, hear of any updates that are about to release or maybe they have released, but maybe there's just for some reason not something being sent out. I will be sure to reach out to you. I'm putting together kind of like a list of a list of customers for this exact reason where, you know, if they want, if they want to know about something, let me through a list in there. So any time something comes up, I can send out an email to you in my email.

JIMMY

14:40 Yeah, that'll be great. Like I said, I've already asked for some enhancements anyways, and we went through that completely with Pamela and she had sent her an excel sheet. She also went in and added some additional stuck to it. We discussed every single item and she definitely could see the need for it. She turned it in. I would just like, I mean, some of those are important. So if they do get and it was some of those minor changes, like it was a simple change within the program in the Northboundary, and it was very simple like a character limit on one.

LOGAN

15:12 Okay.

JIMMY

15:13 That gets changed. I need to know about it because that would change what we're doing. So, that was an important one. I mean, like I said, there was nothing like, hey, I need you to reinvent the wheel to was nothing like that. It was a simple, you know, hey, this could be a whole lot more efficient by doing. X. We walked through. It showed her, she took screenshots and said you're exactly right? You know, so anyways, but some of that stuff. Yeah, I'd be, really interested to know, you know, when it got implemented, if it got done.

LOGAN

15:50 Yeah, awesome. Well, I'm glad that you gave that feedback because we really appreciate the feedback and submit them as, you know, feature requests even. And the more people that add to it, the higher chances that comes to fruition essentially in some senses though, you know, ideas like character limits. No, I don't know because I'm not on that side but stuff like that, it might be an automatic like, yeah, let's go on ahead and just do that. Again, that's a whole different department. So.

JIMMY

16:21 I can't...

LOGAN

16:25 Cool. But, yeah, well, cool. I'm really glad that you're you know, your resources, you're utilizing them and, you know, what you're doing with Northboundary, how long have you all been on Northboundary for her? Just a year? Okay, perfect. And what did you all come from before then?

JIMMY

16:45 Excel workbook?

LOGAN

16:47 Okay. I bet you were happy to get off of that.

JIMMY

16:54 Actually, I mean, the excel work really good because we had our own maintenance calculator in it, so we could generate all the same. We can do everything I can do on work. Boundary actually, you could do in excel everything. No, it was not your typical excel workbook.

LOGAN

17:12 Yeah. I don't think I've heard of that is different. I haven't heard that in particular before. Can you build well, in your department specifically? I know the sales side is a little different. Do you all also build out the proposals in Northboundary? Okay. Could you do that in the excel workbook? Just out of curious, really interesting. Okay. I always like learning about different software and whatnot. So I've heard of people using excel, but I don't think I've heard of anyone using specifically excel workbook. So.

JIMMY

17:46 Yeah. I mean, I just a workbook that we use and yeah, it would auto populate customer information. It would. Yeah, it was if anybody knows anything about software. I mean, Northboundary is a database where you're building the exact same thing in excel.

LOGAN

18:03 Yeah.

JIMMY

18:03 Yeah, it's a database is all it. So it's just a matter of it's. Just got different graphics on. It pulls information from a database if it's there. So it's not complicated. So, I mean, the same thing with like ServiceTrade BuildOps. All of those, it's a database is all it is and you're pulling in you're referencing different tables, store different information. All it is. So it's not really complicated if you really know how it all works.

LOGAN

18:37 Yeah. And you would be surprised. And to be honest, I even kinda surprised myself with how little I know at times when it comes to technology, but also how much I know at the same time. But yeah, yeah, you're definitely hitting the nail on the head. Like if you know how to use it, what you have access to, you can use it really well. Half the battle is just knowing what you have to be in... now, are you all owned? I had a note on your account. So and again, this is the first time as meeting. So I just wanted to get a better idea of background too. Are you all owned by a like a parent group or in group Brian? Yeah. Sorry about that.

JIMMY

19:22 Yeah. Yes, we are. We are owned by a investment group, correct then we have a whole bunch of sisters.

LOGAN

19:28 Awesome. Okay. Gotcha. Do you know if they're all using north?

JIMMY

19:33 Most of them are?

LOGAN

19:35 Most of them. Okay. Cool. Yeah.

JIMMY

19:37 And you're welcome because I'm I've actually got most of them wanted.

LOGAN

19:42 That's what I was gonna bring up. I was like that's exactly where my mind was headed. Perfect. Okay. Do you know, like the few that may not be on it? Was there any reasoning or were they just still in contract with the software?

JIMMY

19:58 I don't know. We don't really. So they're sister companies, they're totally separate from us. So it's seriously like they're their own. Yeah, we don't share the same names, nothing. We all have different names. Okay? Just, we're just owned by the same company. Okay? That's it, but we all have different goals we have, I mean, it's yeah, it's completely different. So, yeah, some like, I believe one of our companies, TCS, which is the, that's one of our sisters down in Texas is Texas. So, systems, they just recently got Northboundary.

LOGAN

20:38 One of my customers, but, they are so new still, I believe they may still be in onboarding, but, yeah.

JIMMY

20:45 And I actually did the training for them on how we use Jackson?

LOGAN

20:50 Awesome. Hey, that will go a long way even just on a resume, you know, like that, is that's actually really big stuff that you're helping out with not only jacks mechanical, but, the much larger picture. So that's...

JIMMY

21:05 So, yeah, and we've got another one. I believe it's supposed to be, they're in the onboarding process right now. I think it's next month. They're supposed to be live with. I... think it's Eric, I think.

LOGAN

21:21 I think I saw them on the list 99 percent for, yeah.

--- Small Talk ---

JIMMY

21:26 Yeah, it's one of our sites also. And so, and then we just got a, they just bought another company in North Carolina. I think it is.

LOGAN

21:35 That's where I'm at.

JIMMY

21:37 And so it's red and blue is what it's called?

LOGAN

21:42 Red and blue.

JIMMY

21:44 Red and blue.

LOGAN

21:45 Red and blue. I'm sorry. Okay.

JIMMY

21:48 Or like red blue. I think it's been a red blue mechanical or something like that is the name of it, North Carolina or South Carolina. One of the two, I can't remember, but it's just called, red. Blue. And red is actually the word red is blue and the word blue is red. Yeah. But anyways, they will probably be on Northboundary before two.

--- Small Talk ends ---

LOGAN

22:14 Sweet. Okay. Well, if you don't mind me asking just because more and more of this, I understand that you all are all very separated and I'll do your own thing. But how did you basically present this to a Ryan group and say, hey, like we want it? But also this could benefit other sister companies.

JIMMY

22:34 There, there wasn't any. So that's, the fun thing about it is we don't have to ask permission, we do our own things.

LOGAN

22:43 Okay.

JIMMY

22:44 So, we are our own company. I mean, now we have to, we have to answer for everything we do. But if I find another software out there that said, hey, this is better

than Northboundary, and I'm switching to it. I don't have to ask. I just do it that's awesome. But they, again, they have to have a return on investment. So, if I spend, if I spent 5,000 dollars on the software, I'd better be able to show there was an improvement there and they get the return.

LOGAN

23:10 Right, undertandably, especially because software can add.

JIMMY

23:13 Northboundary, so one of our other sister companies Calvert controls up in Washington, DC, they were on Northboundary before we were, and I got to talk to them about it and believe they're not, I've actually after we got on boarded with Northboundary, I then train them on how we use it because we were using it way beyond what they were. And so, we still share ideas with each other but it's again, it's not, hey, Jackson's doing this. So you have to do it now.

LOGAN

23:50 That's awesome. They give you all that free range because I know with a lot of parent companies, it's kinda cookie cutter by the book. This is how you do it for all of them straight across the board. So that's really awesome that they.

JIMMY

24:02 No, they look at success. So if we're doing something and we're very successful at it, they wanna know, okay, how do we become so successful? And can we share this with the other companies and hopefully give them the same success?

LOGAN

24:18 Perfect.

JIMMY

24:19 So it's not a mandatory thing. It's more of a, the only thing that's mandatory is BuildOps. That is the only thing that they're all switching to BuildOps and that's part of the Ryan part of it. So that's got the financials and all that kind of stuff. And they're doing all that. So we have no control over.

LOGAN

24:39 Understandable. Does Northboundary integrate with BuildOps?

JIMMY

24:44 No, but I wish it would.

LOGAN

24:46 Okay. Yeah. The reason I ask is and, I'm not pitching you like sales pitching you because that's a whole different area of service trade anyways. But service trade, since we have acquired Northboundary, we do integrate with Northboundary.

JIMMY

25:01 Yep. I have no control over any of that. That is, yeah, I know that we've been told we are on BuildOps and they're not gonna.

LOGAN

25:10 Yeah, no. Understandable. Again, like that's outside my scope of work even, but that's why I asked that to see if it would integrate. But, okay, well, cool. Sweet. Well, what we can do is going well. You said tomorrow works well today?

JIMMY

25:32 Yeah. I was really hoping you had numbers today, to see where we're at.

LOGAN

25:38 Let me see because I got a let's see, I got a few hours before my internal meeting that I'll have, I can get you those numbers before I go to that meeting. So I can get you those numbers quickly? I just gotta go and get the...

JIMMY

25:56 So, I'm, really hoping that it's not a substantial change in price... if it is, we're going to have issues, right?

LOGAN

26:08 Yeah, no, I will say, I believe again, don't quote me on it because I wanna make sure I give you the facts, I believe that there is an increase, but because you're an existing customer, it is nothing compared to like a brand new person walking in on that. I do know pricing has changed on for when it comes to like, you know, legacy slash current customers versus a brand new customer. So let me get that pricing. Again. I just am more of a factual person. So I want to give you the facts. So, yeah, are you free for the next hour or two hour range? If I give you a call?

--- *Wrap-up* ---

JIMMY

26:49 Sure.

LOGAN

26:50 Just wanna make sure I don't call you if you're busy and can't...

JIMMY

26:53 I'm always busy. I mean, my phone has been ringing the entire time we've been on this call.

LOGAN

26:57 That's well, I'll leave you a voice mail. If you don't answer and feel free to call me back. If I don't answer your return call, then don't worry. I will get back to you. Trust me. I got you. Okay. Cool. Awesome. Well, thanks for meeting with me today. Did you have any last questions?

JIMMY

27:14 For me? No, sweet.

LOGAN

27:18 Awesome. I'll get you that pricing here very shortly.

JIMMY

27:20 Okay. Sounds good.

LOGAN

27:23 Awesome. Thanks. Have a good.

JIMMY

27:24 You. Bye bye.

LOGAN

27:26 Bye.

The End