# Call with K.E.G Plumbing & Mechanical - Samantha Osmer

Chris Resta with K.E.G Plumbing & Mechanical
Recorded on 11/7/23 via SalesLoft, 18 min.

## Participants

### SERVICETRADE

Chris Resta
*Associate NorthBoundary Account Executive*

### K.E.G PLUMBING & MECHANICAL

Samantha Osmer
*COO*

# Topics

# Transcript

### CHRIS

0:00 Hey, Ashley, it's Chris, see if Samantha was in this morning?

### SAMANTHA

0:01 Hey, do you plumbing? This is Ashley. How can I help you?

### SAMANTHA

0:07 Can I tell her who's calling?

### CHRIS

0:08 Yeah, yeah, it's Chris rest.

### SAMANTHA

0:11 With, in regards to.

### CHRIS

0:13 She had filled out a demo request earlier this morning for ServiceTrade.

### SAMANTHA

0:19 ServiceTrade. Okay. Hold on just one second.

### CHRIS

0:20 Okay.

### SAMANTHA

0:28 Did you know that keg plumbing has a tool?

### CHRIS

0:29 Hey, Smith. Good morning. It's Chris, rest over service trade. I saw that you had filled out a demo request. Do you have a minute this morning?

### SAMANTHA

0:37 I...

SAMANTHA

0:44 Thank you for holding this Amanda?

SAMANTHA

0:51 Well, I actually sent an e-mail this last week and.

CHRIS

0:59 Can you hear me? Okay? My phone's kinda going in and out. All I heard was you sent an e-mail...

SAMANTHA

1:06 I sent an e-mail to one of your staff members. I guess, I mean, he may not be, but I didn't get, it never bounced back. So, last week for somebody with your organization to contact me, and I just didn't hear back. So, I just went on the website to fill that out... because I've actually spoke to you all in the past... and we were gonna set up a demo, but we went ahead and pulled the trigger on something. And needless to say... we've never gone live. We set up the program. We did all these things and then just before we were gonna live, they figured out that there was a huge issue with inventory.

CHRIS

1:25 Okay.

CHRIS

1:29 Yeah.

CHRIS

1:39 It here.

CHRIS

1:42 In...

SAMANTHA

1:56 And inventory is huge with us. And so, we, of course, put the breaks on it. And then we were told, you know, like, you know, we're going to have that issue resolved by this time and it wasn't resolved by then. And then we got to the next date and it wasn't resolved by then. And so now our owner is like, okay.

CHRIS

2:07 Man. Okay. Was it build us? Is that the one you all were trying to go live with?

SAMANTHA

2:19 I'm done like, we gotta go because we're still like paper. We went digital... hell like in 2017.

SAMANTHA

2:31 Because we bought another program and it went to hell in a hand basket within about two weeks, the guys gave us back their tablets and said we are not gonna use that program... so.

SAMANTHA

2:45 Yeah. So, we tried to go live of BuildOps... which they got a great program, but.

SAMANTHA

2:52 They said the integration with.

*--- Accounting integrations ---*

SAMANTHA

2:55 Like Quickbooks, for some reason, there was a glitch in the accuracy of inventory and going, the information going from BuildOps to Quickbooks for billing purposes. And I'm like, okay, well, that's gonna make my life absolute hell. No, like, we can't do that. I can't have that problem. So, you know, we're we are a different beast per SE.

*--- Accounting integrations ends ---*

SAMANTHA

3:25 When it comes to, we're okay. Our guys in the field do not work ever like it, it's against, no, they do not. It is against policy for them. We're not a flat rate company. We're TAM.

*--- Accounting integrations ---*

CHRIS

2:58 Yeah.

CHRIS

3:04 Five.

CHRIS

3:07 Well...

CHRIS

3:13 I'm an...

CHRIS

3:16 Okay.

CHRIS

3:19 Yeah.

--- *Accounting integrations ends* ---

CHRIS

3:25 Okay. What do you mean by that?

CHRIS

3:32 You guys don't quote at all? Okay.

SAMANTHA

3:41 We have government contracts. We have, you know, contracts with like atlantic station, and hazard Bush, most of the major school systems in the Atlanta area. So, we have an hourly, you know, another big thing with us. So, and to throw this out there, so you can say, no, we might not be the one.

CHRIS

3:48 All right.

CHRIS

3:53 Okay.

--- *Assets* ---

SAMANTHA

4:05 Asset tracking because our guys can have like certain cameras on their truck. And if somebody is near them, that camera needs to have the ability to be transferred from one truck to the next truck or a getter, or something like.

SAMANTHA

4:22 Because it's a piece of equipment that we're not selling it's, an asset of ours that is basically needs to be tracked from one vehicle to the next and be able to be transferred accordingly.

CHRIS

4:23 Good morning.

CHRIS

4:30 Okay. So, like a service history is something big for you all, like asset tracking, it's kinda what you.

SAMANTHA

4:38 It is asset tracking, but, you know, other big thing is.

SAMANTHA

4:45 Like services such as backflow... you know, we need to be able to ensure that can be tracked properly in the program instead of us having a 1,000 spreadsheets that we're depending on somebody to look at every day, you know, if you'll have it to where templates can be built into your system, that's awesome.

--- *Forms* ---

SAMANTHA

5:10 That's that was one of the things that sold us on BuildOps, is that we could put backflow reports into the system and the guys could just, you know, put information on the report because we, I built the reports into the system. Basically, they have it to where you could.

--- *Assets* ---

CHRIS

4:48 Hum.

CHRIS

5:01 Yeah. Okay.

--- *Forms* ---

SAMANTHA

5:30 Pull the PDF into their system and I could...

SAMANTHA

5:35 Input certain fields that I knew they had to fill out. Does that make sense? And then I could put all of the other information in all the other fields. So then they only had to fill in like, you know, the pressure here, pressure on check, one pressure on check too.

--- *Type of work* ---

SAMANTHA

5:52 And you know what I mean? Like certain things, they knew that they had to fill in and I could have all of the other information filled in for them, you know, such as like their signature, their calibration date on their machine, their, you know, serial number on their machine. I mean, like I'm just giving you kind of like all of the key things that.

CHRIS

5:38  Huh.

CHRIS

5:41  Yeah.

*--- Type of work ---*

CHRIS

5:53  Yeah, yeah. Yeah.

CHRIS

6:00  Okay.

CHRIS

6:05  Hum.

CHRIS

6:09  Okay.

SAMANTHA

6:19  We need in a system?

CHRIS

6:19  Yeah. Okay.

SAMANTHA

6:23  Because like I said, I mean, we're a different type of commercial industrial pump company. We're not, we do a little bit of residential, but not very much because our prices are geared toward commercial and industrial.

CHRIS

6:37  Okay. What would you call the kind of breakdown between the commercial and industrial like 90 percent? And then, you know, 10 percent residential or what would you kinda, okay. Yeah, that's awesome. As far as services go. I mean, do you guys have like preventative maintenance contracts in place or?

SAMANTHA

6:44  Absolutely. Yep.

SAMANTHA

6:54 We, do we serve is like, we have boiler systems that we service annually?

CHRIS

7:02 Okay.

SAMANTHA

7:02 For different properties as well as school systems, we also have like preventative jetting maintenance for certain properties in schools where, you know, we know there's a problematic system, but they don't want to repair the system, they just want us... you know, conducting the preventative maintenance to the system until we actually have to, you know, till they have to spend some more money and repair the, our system. So we do a lot with preventative maintenance on jetting.

CHRIS

7:11 Okay.

CHRIS

7:28 Huh. Okay.

CHRIS

7:35 Okay.

SAMANTHA

7:36 Boilers...

SAMANTHA

7:39 You know.

SAMANTHA

7:41 I would consider backflow as part of that because it's an annual service that we provide and they have to be done by certain dates. So I would still consider that.

SAMANTHA

7:54 Yeah, we do a lot.

CHRIS

7:55 Yeah. Sounds like what about as far as technicians go, how many guys do you have out in the field right now?

SAMANTHA

8:02 Like leads? And helpers?

CHRIS

8:06  I would just say, lead. Yeah, just.

SAMANTHA

8:07  Or you just saying leads?

SAMANTHA

8:11  Let's see.

SAMANTHA

8:15  Eight.

CHRIS

8:16  Eight text. Okay. And are those all strictly service? Are those all kind? Are they cross trained? Like?

SAMANTHA

8:24  We're not new. We don't do new Construction or?

CHRIS

8:28  Okay.

SAMANTHA

8:31  Or in new Construction or our plumbers there, they weren't our technicians. They all of our plumbers that were in our new Construction division, went over to our source division. We...

CHRIS

8:35  Okay.

SAMANTHA

8:42  List...

CHRIS

8:43  Okay. Makes sense. So, it was kinda breaking up a little bit. All those texts that you guys have. Those eight guys. Those are strictly, okay. Okay.

SAMANTHA

8:50  They went to our service is because we are extremely like.

SAMANTHA

Service work in content.

CHRIS

9:00 Okay, cool. Cool. And as far, as current process, I think I had Computerease down here as well. Is that something you guys are still using?

--- *Type of work ends* ---

SAMANTHA

9:11 What now?

CHRIS

9:12 As far as what you guys have in place right now? Yeah, I keep doing that. Can you hear me a little bit then?

SAMANTHA

9:14 You keep breaking up on me honey?

SAMANTHA

9:18 Hello, you keep breaking up on me?

CHRIS

9:22 Is that any better right now? Okay, cool.

--- *Accounting integrations* ---

CHRIS

9:26 I don't know why I keep doing that. My phone's giving me issues this morning. I had a few other platforms that you guys are running on like Computerease...

SAMANTHA

9:24 Now it is.

SAMANTHA

9:33 Yep.

CHRIS

9:35 Is that what you guys currently have in place or?

SAMANTHA

9:37 Yes.

CHRIS

9:38 Okay. Computer.

SAMANTHA

9:43 Well, we got it in 2016, implemented it in 2017.

CHRIS

9:49 Well...

SAMANTHA

9:50 Paper, you know, like going digital and you would probably stroke the hell out if you saw.

CHRIS

9:56 Like he...

SAMANTHA

10:01 The paper that we go through like...

*--- Type of work ---*

SAMANTHA

10:05 It's an ungodly amount paper.

CHRIS

10:08 Yeah. I could only imagine. I can only imagine.

SAMANTHA

10:12 So, but, you know, they said, okay, so, like for instance, with computers, like they told us, you know, this, is, this is this well, because our work has always been mostly service in, not necessarily new Construction con, computer, is a great new Construction program, but it isn't it, it's horrible for service.

*--- Parts management (inventory) ---*

SAMANTHA

10:36 So like you can transfer from my main warehouse to a job like a new Construction job, but I can't transfer from my main warehouse to a work order for a service work order job, meaning new Construction job, you can.

*--- Type of work ---*

CHRIS

10:33 Huh.

*--- Parts management (inventory) ---*

CHRIS

10:48 Okay.

CHRIS

10:53 Okay.

SAMANTHA

10:57 New Construction job, but you can not transfer from your truck to a service work order.

*--- Tech time tracking ---*

SAMANTHA

11:05 Now, like it, it's just really like it's really screwy. A technician can clock in real time on a new Construction job, but a technician can put in whatever time they want.

CHRIS

11:23 Huh. Okay. And...

SAMANTHA

11:25 So, you know what I mean? Like in those?

SAMANTHA

11:28 No, like, that makes no sense. Like why can't the clock in?

CHRIS

11:29 Yeah.

*--- Tech time tracking ends ---*

SAMANTHA

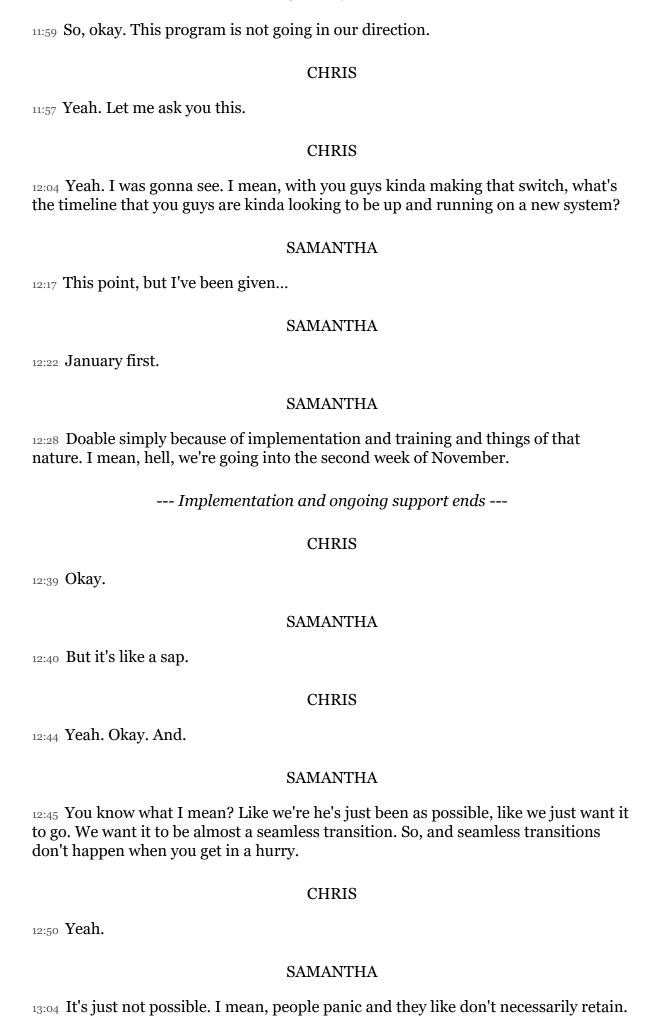11:34 Or service work order if they can do it. And I had asked and ask with Computerease for years. I mean, like sat in meetings, all these town halls, whatever this is, what needs to happen to make this a better service platform. And.

SAMANTHA

11:52 Every want that I had in 2016 is still a want 2023.

*--- Implementation and ongoing support ---*

SAMANTHA

11:59  So, okay. This program is not going in our direction.

CHRIS

11:57  Yeah. Let me ask you this.

CHRIS

12:04  Yeah. I was gonna see. I mean, with you guys kinda making that switch, what's the timeline that you guys are kinda looking to be up and running on a new system?

SAMANTHA

12:17  This point, but I've been given...

SAMANTHA

12:22  January first.

SAMANTHA

12:28  Doable simply because of implementation and training and things of that nature. I mean, hell, we're going into the second week of November.

*--- Implementation and ongoing support ends ---*

CHRIS

12:39  Okay.

SAMANTHA

12:40  But it's like a sap.

CHRIS

12:44  Yeah. Okay. And.

SAMANTHA

12:45  You know what I mean? Like we're he's just been as possible, like we just want it to go. We want it to be almost a seamless transition. So, and seamless transitions don't happen when you get in a hurry.

CHRIS

12:50  Yeah.

SAMANTHA

13:04  It's just not possible. I mean, people panic and they like don't necessarily retain.

SAMANTHA

13:09  They're just kinda like just shuffling shit. Excuse my language. I'm, very transparent to you and just very blunt, you know, like they, I'm realistic. I'm not like my owner nest not necessarily is, and I can say it like that because he's my husband but... you know, I've been given the orders, I mean, and I've seen source fusion. I've seen service tight and I've seen all of these other like platforms when I went with BuildOps, sat through 14 demos before I decided them.

CHRIS

13:07  No, yeah. That's awesome. I appreciate that.

CHRIS

13:42  Man. Okay.

SAMANTHA

13:44  So, all yours is the only thing I haven't...

*--- Purchase decision ends ---*

CHRIS

13:49  Okay. Cool. Well, yeah. I mean, I definitely think it'd be relevant, to set up a demo for you. I mean, is there a time we're both you in, you know?

SAMANTHA

13:56  He's not going to be a part of it because he doesn't even turn on computer, it will be me and my internal staff like it'll be me and one of my service administrators and my coordinator.

CHRIS

14:11  Okay.

CHRIS

14:13  As far as day and time goes, what do you think, would work best for you guys?

SAMANTHA

14:19  Sooner rather than later sometime this week would be awesome. Preferably what time zone are you in?
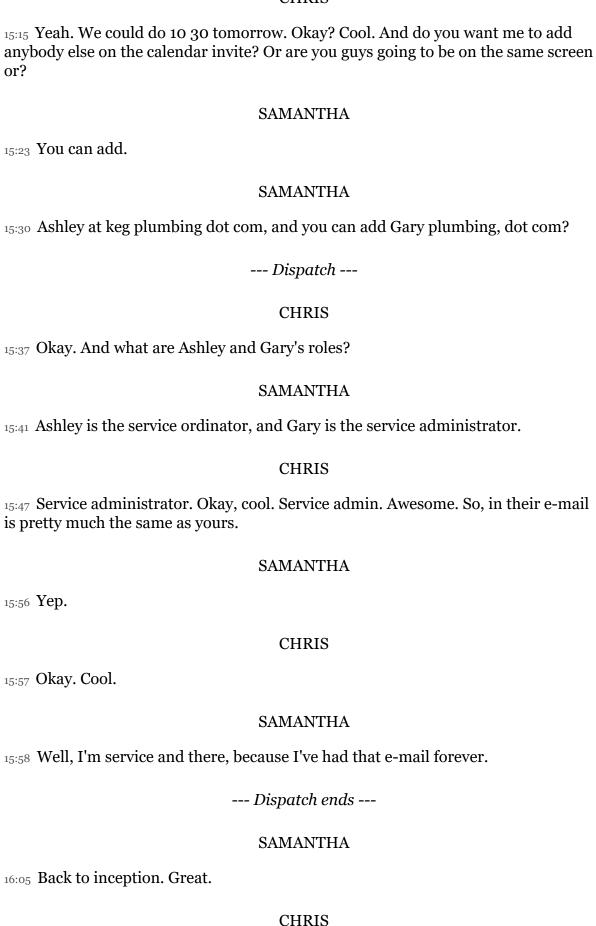
CHRIS

14:24  Okay.

CHRIS

14:28 We're in Eastern Time. Are you guys?

                    SAMANTHA

14:29 Okay. Yeah, we're eastern too. Okay?

                    CHRIS

14:31 It always makes it easier.

                    SAMANTHA

14:33 Yes, it does.

                    CHRIS

14:34 We could do it later today.

                    SAMANTHA

14:37 Today may not work simply because my service administrator is not here. He was on a job until late last night. So, could we set up maybe something where's my?

                    CHRIS

14:41 Okay.

                    CHRIS

14:50 Let me ask you this. Would you prefer to do it in the morning or afternoon? Because tomorrow morning's looking open and so is Thursday.

                    SAMANTHA

14:56 Morning would be better for me?

                    CHRIS

14:58 Okay. We could do 10 30 tomorrow, you know, 1,115 or like, you know, 845, nine o'clock on Thursday. And then Friday is pretty open as well. So, it's whatever you guys.

                    SAMANTHA

15:06 Let me see.

                    SAMANTHA

15:10 So, 10 30 tomorrow?

                    SAMANTHA

15:14 Is that what you said? Yep. Let's do.

CHRIS

15:15 Yeah. We could do 10 30 tomorrow. Okay? Cool. And do you want me to add anybody else on the calendar invite? Or are you guys going to be on the same screen or?

SAMANTHA

15:23 You can add.

SAMANTHA

15:30 Ashley at keg plumbing dot com, and you can add Gary plumbing, dot com?

*--- Dispatch ---*

CHRIS

15:37 Okay. And what are Ashley and Gary's roles?

SAMANTHA

15:41 Ashley is the service ordinator, and Gary is the service administrator.

CHRIS

15:47 Service administrator. Okay, cool. Service admin. Awesome. So, in their e-mail is pretty much the same as yours.

SAMANTHA

15:56 Yep.

CHRIS

15:57 Okay. Cool.

SAMANTHA

15:58 Well, I'm service and there, because I've had that e-mail forever.

*--- Dispatch ends ---*

SAMANTHA

16:05 Back to inception. Great.

CHRIS

16:08 But it's just Ashley at keg plumbing, and then Gary plumbing. Okay, cool. I just wanna make sure I got that right?

SAMANTHA

16:09 Yeah, and...

SAMANTHA

16:11 Yes, yes.

SAMANTHA

16:15 Yep.

CHRIS

16:16 Awesome. I will go ahead and add them and shoot you over the calendar invite.

CHRIS

16:21 Make sure, yeah, 10 30 tomorrow. You guys are Eastern Time. It looks like Susan Warren would be the it M, that you'd be sitting down with and I'll let her know everything that you kinda mentioned to me. Do you have any like specific questions for me or anything that I can help get answered for you in the meantime, well, I've got you.

SAMANTHA

16:38 No.

CHRIS

16:39 No. Okay. Cool. Well, let me know if you guys do, and can definitely help with that.

SAMANTHA

16:41 Okay.

SAMANTHA

16:46 You shoot me over an e-mail with your contact info just in case so that I can shoot you emails versus like reaching out... yes, please?

CHRIS

16:54 Yeah. Do you want me to do it separately then the counter invite? Okay, cool. I had just sent you the calendar invite. So you should see that in your inbox in the next like a minute.

*--- Dispatch ---*

CHRIS

17:03 Or two. It's gonna come from Chris rest ServiceTrade, dotcom. And then, yeah, I can shoot you another e-mail just to give you like my contact information as well. But I appreciate the time this morning, Samantha. And yeah, really looking forward to

getting you guys in front of ServiceTrade. And just, yeah, let me know if you have any other questions.

SAMANTHA

17:02 Okay.

SAMANTHA

17:11 Sounds good.

SAMANTHA

17:19 Sounds good.

CHRIS

17:22 I did want to ask you. What are you guys using as far as like accounting goes?

*--- Accounting integrations ---*

SAMANTHA

17:27 Well, we're supposed to be, I guess going to Quickbooks. Why? What are you all?

CHRIS

17:33 We do like integrate with Quickbooks. Do you know what version you guys are kinda looking into?

SAMANTHA

17:38 Not necessarily not yet, but what other accounting programs do you integrate with?

CHRIS

17:40 Okay.

CHRIS

17:46 That is a great question.

*--- Accounting integrations ends ---*

CHRIS

17:51 I'd have to look. I can just send you an e-mail of ones that we do integrate with because there's a good amount of them. Let me see.

SAMANTHA

17:58 Okay.

CHRIS

18:01 Yeah, I'll just send you another e-mail and include, the ones that we integrate with, just to give you a better visibility.

SAMANTHA

18:07 Okay.

CHRIS

18:08 Well, sounds good. I appreciate it and hope you have a good rest of your day. All right. Take care.

SAMANTHA

18:12 All right, you too. Thanks bye.

## *The End*