



Call with JSThree LLC - chaz Huntwork

Chris Resta with JSThree LLC
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Participants

SERVICETRADE

Chris Resta

Associate NorthBoundary Account Executive

JSTHREE LLC

Chaz Huntwork

Service Manager, Partner, Decision Maker

Topics

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Transcript

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CHRIS

0:00 Hey, Chaz, it's Chris E service trade. Did I get you at the minute?

CHAZ

0:00 This job?

CHAZ

0:09 Yeah, go ahead.

CHRIS

0:11 Awesome. Man. We saw that you'd put in, a demo request the other day and I just kinda wanted to, you know, gather a little bit more information from you.

--- Type of work ---

CHRIS

0:18 If you have a few minutes. Yeah, for it. Awesome. Well, you know, are you familiar with service trade or does the name ring a bell?

CHAZ

0:16 Yeah. Go for it.

CHAZ

0:28 Name rings a bell.

CHRIS

0:30 Okay. We're word less software just to kinda give you like a brief overview. We're the software field service management tool designed to help commercial service contractors with like, you know, managing their work orders and driving sales and just simplifying the workflows for scheduling and, you know, just kinda wanted to see, what piques you all interest and what you guys are kinda looking for?

CHAZ

0:44 Yep.

CHAZ

0:52 Tell me this, are you guys created by the same company or owned by the same company that does spectrum or are you guys completely different?

CHRIS

1:00 We are completely different.

CHAZ

1:04 Okay. Cool.

CHAZ

1:06 Yeah. So, we have a commercial hvac company. And so we're looking for something to handle basically everything that you guys probably do from scheduling and dispatching to.

CHRIS

1:10 Okay.

CHAZ

1:21 You know, doing notes, having guys enter all, their time card and their time towards jobs, all that kind of stuff into it. Really, we're looking for something more commercial geared for hvac, is possible. Basically, we wanna just really just want something streamlined. We don't expect any platform to be perfect.

--- Purchase decision ---

CHAZ

1:43 And we know, you know, I'm sorry, service trade is not perfect and got challenges too, but we're just looking for some company that's gonna be open with us to kinda, so we can kinda figure out what the best fit for us is and a nutshell that's kind of, I guess what we're looking for?

--- Type of work ---

CHRIS

1:29 Okay.

CHRIS

1:36 Yeah.

--- Purchase decision ---

CHRIS

1:43 Okay.

CHRIS

1:57 Yeah.

--- *Type of work* ---

CHRIS

2:03 Yeah, makes total sense. And so, we're yeah, strictly for the commercial industry, whether that's you know, hvac or anything under the sun. Are you guys strictly hvac?

CHAZ

2:14 Yes.

CHRIS

2:14 Okay. Cool. Where are you guys headquartered out of?

CHAZ

2:18 Portland, Oregon?

CHRIS

2:20 Oregon. Okay. Cool. And... I guess as far as service goes right now, is that majority of what you guys are doing or?

--- *Pricing* ---

CHAZ

2:30 Probably about 60... 60 or 65, 65 percent projects and then was at 35 percent.

CHAZ

2:42 Service?

CHRIS

2:43 Okay. And what's the typical like project duration? Is that like anywhere from three to six months or?

CHAZ

2:50 No, we're a smaller company. Our typical job is probably like one to two weeks.

CHRIS

2:56 Nice. Okay. Awesome.

--- *Type of work* ---

CHRIS

3:00 But yeah. So we're definitely geared for, that 35 percent service. The project side is something that we've added, you know, a few months ago. So that might be relevant for you guys. I'm not really sure, but let me ask you this as far as your current process goes, do you have a field service management tool in place or what are you guys typically using? Is it pen and paper or?

CHAZ

3:02 Or?

CHAZ

3:20 Yeah, right now, we use ServiceFusion.

CHRIS

3:23 ServiceFusion. Okay. How's that going?

CHAZ

3:25 And I, we don't really like it at all, but it's practical and it's not very spendy, we're in the position now where we want to, we want to invest in some nice software.

CHRIS

3:37 Yeah, makes total sense. And they're I do know they're more geared for kind of, the residential... you know, workspace.

--- Accounting integrations ---

CHRIS

3:46 So, glad you guys have kinda found that out on your own... as far as like accounting goes, do you guys use them for accounting or?

CHAZ

3:44 Yep.

CHAZ

3:54 Nope. Yeah. We only use, we use Quickbooks online.

CHRIS

3:58 Quickbooks online. Okay. We have an integration with Quickbooks online, which I'm not sure if you found that on the website or if it's even up there to be honest with you. Yeah.

CHAZ

4:08 Yeah. It's it's on there. You guys work with a number of platforms. You also lifted spectrum as one of the accounting softwares you work with, but.

CHRIS

4:17 Okay. Cool. And are you guys looking into spectrum? Is that why you're kinda asking if we're if they created?

CHAZ

4:21 No, no, not really.

--- Accounting integrations ends ---

CHAZ

4:24 I sat down with the people who make spectrum. They also have something else and I thought he was saying that was service trade. So that's why I was that's why I wanted to ask?

CHRIS

4:27 Bye.

CHRIS

4:33 Yeah, no, I'm curious. No, no, it's not us, it might have been best.

--- Type of work ---

CHRIS

4:39 Can I know that's what they were called or Desco or something? I don't know. There's a lot of them out there. It's hard to kind of pin a few, but... as far as technician goes, how many guys do you guys have out in the field?

CHAZ

4:46 No kidding.

CHAZ

4:53 Six.

CHRIS

4:55 Okay. And are those strictly service or they kinda cross trained for both projects and service?

CHAZ

5:01 Both?

CHRIS

5:02 They are cross trained. Okay, cool.

CHRIS

5:07 Awesome. And I was trying to pull up there. We go all website?

CHRIS

5:15 Design build, retrofit replace maintenance and service, hvac controls are pretty much the bulk of what you guys do.

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

CHAZ

5:22 Yep.

CHRIS

5:23 Okay. Awesome.

CHRIS

5:27 And then Jazz, what would be your role over there?

CHAZ

5:30 Service manager slash partner?

CHRIS

5:34 Okay. Cool. So, you kinda wear a lot of have.

CHAZ

5:38 Yup. Yeah, me and my partner, are we on it 50 50?

CHRIS

5:42 Okay.

CHRIS

5:45 And as far as the demo, goes, is there like a good day that you're thinking that it's gonna work best for you?

CHAZ

5:52 Yeah, sometime next week early in the morning would be best. I'm not sure. Yeah, we're obviously in Oregon. So we're Pacific Time. We, we kinda like calls at like six am our time if that's possible.

CHRIS

5:56 Okay. Let me.

CHRIS

6:07 Yeah, man, that makes it easier for us, but, if you guys are willing to do that, if that's what you guys prefer, we can definitely do that for you.

--- *Type of work* ---

CHAZ

6:13 Yeah.

CHRIS

6:15 Let me ask you this. As far as your projects goes, do you guys subcontract a lot of your work or is it pretty much the six guys that you have and you subcontract maybe a little bit of that?

CHAZ

6:24 As far as mechanical stuff, the stuff that we do, we take care of, but, we do quite a bit of sub contract with like electricians, some plumbers.

CHRIS

6:36 Okay.

CHAZ

6:36 We kind of act as the GC, on our projects.

CHRIS

6:44 All right.

CHAZ

6:44 Of course, they're not massive projects but.

CHRIS

6:48 Yeah, we just like to figure out if it's like a majority of your work is subcontracted or if it's majority kinda inhouse... if that makes sense.

CHAZ

6:53 I see. Yeah.

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

CHAZ

6:56 Yeah.

CHRIS

6:58 But yeah, as far as that goes, I can pull up my calendar right now and see what days we've got open... might take me a second to load.

CHRIS

7:12 Do that quick.

CHRIS

7:27 Okay. There we go. Do you want me to use that e-mail chat?

CHAZ

7:30 Yes.

CHRIS

7:31 The JSThree, dotcom, I think is the one that we had now. Okay?

CHAZ

7:34 Yeah, Chaz JS, three.

CHRIS

7:37 Okay. We are in Oregon, Pacific Time?

CHRIS

7:43 Next week is our specific day you're thinking?

CHAZ

7:46 Let me see here. I just got my calendar.

CHAZ

7:53 Okay. There we are.

CHAZ

7:58 Maybe either like...

CHAZ

8:02 Tuesday or Thursday?

CHRIS

8:03 Okay. Tuesday, we could do.

CHAZ

8:10 Well, how about that? How about any day that week at six am? And, but not Wednesday?

CHRIS

8:18 Okay. Do you wanna do Monday at six am? We've got that open?

CHAZ

8:22 Yes.

CHRIS

8:23 Now that six a. M, your time just to confirm?

CHAZ

8:27 Yes.

CHRIS

8:28 Okay. Cool. And do you want me to add anybody else in on the counter invite?

CHAZ

8:34 Yeah, it's gonna be Sean F, as in fox trot.

CHAZ

8:42 At JSThree. Dot com?

CHRIS

8:44 Jsbridet. Okay. And I can H a NE just to make sure. Okay?

CHAZ

8:48 And then...

CHAZ

8:51 Yup.

CHAZ

8:53 And then one more we'll do, Jared F.

CHRIS

8:59 All right, Jerry, is that J a RRJ a RROD?

CHAZ

9:04 J a RED.

CHRIS

9:07 ED. Okay. Awesome. And I can just add them on the counter invite just to make it easier for you.

--- Purchase decision ---

CHAZ

9:15 Perfect.

CHRIS

9:19 Yes. And then in the meantime, do you have any, what was Jerry's last name? It's Jerry?

CHAZ

9:21 Okay.

CHAZ

9:28 Yep.

CHRIS

9:28 Okay. Cool.

CHRIS

9:31 Any questions for me or anything I can kinda help explain for you? Just kinda?

CHAZ

9:36 Not necessarily. I mean, there's I've got a 1,000,000 questions, but I think a lot of them will get, you know, we'll get answered during the demo and is that demo with you or somebody else?

CHRIS

9:46 Absolutely.

--- Purchase decision ends ---

CHRIS

9:49 So, unfortunately, it's not with me. You're gonna sit down with my buddy Alex and I'm glad you asked because I should have clarified this. So, my buddy Alex, is it M there at ServiceTrade and he'll walk you through the more technical stuff. How

ServiceTrade works. You know, what it's gonna look like day to day for you guys and get like an overview of the business?

CHAZ

9:58 Okay.

CHAZ

10:05 That's perfect.

CHRIS

10:10 Yeah. So, he'll walk you through that and I just sent you the calendar invite. So all three of you guys should get it in the next few minutes here. Once my calendar loads, there we go. And I know you did kinda mention this. You guys are 100 percent commercial.

--- Purchase decision ---

CHRIS

10:24 Okay, cool. Yeah. Other than that, I mean, it sounds like it's gonna be, you know, pretty relevant for you guys. Do you guys have like a timeline of when you'd like to be, you know, live up and running on a software or is it just kinda, you guys evaluating things or?

CHAZ

10:24 Yeah.

--- Implementation and ongoing support ---

CHAZ

10:38 Yeah, January or February?

CHRIS

10:42 Okay. So, you know, new year.

CHAZ

10:44 Yeah, new year. We're gonna do it this year, but our cpa just wants us to push off some of these expenses till next year. So, so we're using, you know, November December to try and talk to all of you guys and figure it out.

--- Purchase decision ---

CHRIS

10:59 Yeah, makes sense. And then you mentioned you guys are kinda looking at spectrum.

CHAZ

11:04 No, we crossed them off the list. The one that we're pretty curious about is BuildOps.

CHRIS

11:12 Yeah. Okay. I do know build ups.

CHAZ

11:17 And they're the only other one that we're like pretty serious about. So.

--- Pricing ---

CHRIS

11:23 Okay. Yeah, no worries. And, the cool thing is about service rate is like... we have a 96 percent retention rate. Obviously, we're trying to do what we can to do everything we can to kinda keep that if not raise it. So, if it's a good fit, they're going to be honest with you.

--- Purchase decision ---

CHRIS

11:38 If it's not, we're going to be honest with you either way, shake hands, and kinda walk our way, but, you know, from everything you mentioned, it seems like it's going to be a great fit.

--- Pricing ---

CHAZ

11:34 Yeah.

--- Purchase decision ---

CHRIS

11:47 As far as like needs or wants in the software, is there anything specific that you guys need to have? You know, when you guys are evaluating things?

--- Type of work ---

CHAZ

11:58 Yeah, we just want to be able to do, you know, run both our service and our projects 100 percent, you know, we want.

CHAZ

12:11 You know, we want to be able to run reports on a bunch of different, you know, kind of run customized reports.

CHRIS

12:20 Okay.

CHAZ

12:20 You know, for different aspects, of the, you know, of our projects and our service calls and stuff.

CHRIS

12:30 Yeah, makes total sense. And then... I think my last question for you is like, do you guys have preventative maintenance contract in place or are they nice. Okay, cool. Yeah, we always try and figure out if it's like majority like plan maintenance or reactive kind of service that's why I asked, you know, those.

CHAZ

12:37 Yes, definitely.

CHAZ

12:45 Yeah, yeah. We've got a pretty good mixture of all of it to be honest.

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

CHRIS

12:55 All right. Sounds good, man. Well, you've got the calendar invite. I'll do kind of my due diligence, give you a call the day before, just to make sure we're good to go. I believe there is a reschedule link. If something does come up at the bottom of that calendar invite. I sent you so you guys can actually go in and kinda manually change it if your calendar is don't align?

CHAZ

13:13 Okay.

CHRIS

13:14 Do you want me to let Alex know we can record the Zoom call as well if something does come up with Jerry or Shane or you, is that something you want Alex to do or?

CHAZ

13:25 Yeah, that's fine.

CHRIS

13:26 Just so you guys kinda have visibility, if something comes up.

CHAZ

13:30 Yeah, I do that.

CHRIS

13:32 Okay, cool. I'll let them know. And yeah, other than that man, just shoot me a call or e-mail if you have any other questions, I can get an answer for you even if they are more technical, you know, that's what I'm here for. But other than that, appreciate, the time today and looking forward to it may, I hope you have good rest of your week.

CHAZ

13:48 You, you too broad. Appreciate you.

CHRIS

13:50 Absolutely. Have a good one. Bye.

CHAZ

13:52 Bye.

The End