



Call with Cool Air Mechanical, Inc - Ryan Holta

Sean Jenkins with Cool Air Mechanical, Inc
Recorded on 11/10/23 via SalesLoft, 13 min.

Participants

SERVICETRADE

Sean Jenkins
SDR

OTHER

Ryan Holta

Topics

<i>Purchase decision</i>	0:29
<i>Accounting integrations</i>	1:05
<i>Paper process</i>	1:35
<i>Purchase decision</i>	1:57
<i>Accounting integrations</i>	3:05
<i>Accounting integrations</i>	3:44
<i>Purchase decision</i>	4:16
<i>Pricing</i>	7:08
<i>Type of work</i>	7:35
<i>Accounting integrations</i>	8:37
<i>Accounting integrations</i>	9:14
<i>Implementation and ongoing support</i>	10:49
<i>Purchase decision</i>	11:11
<i>Pricing</i>	12:19

Transcript

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

SEAN

0:00 Hey, Ryan, Sean Jenkins giving you a call with service trade, cat you at a good time this morning?

RYAN

0:00 This is Ryan.

RYAN

0:08 No, we're not interested. We just switched softwares.

SEAN

0:12 Gotcha. That, that was BuildOps like a year ago, right?

SEAN

0:17 Gotcha. And everything's going. All right, implementation went smoothly.

RYAN

0:22 No, but it is what it is.

SEAN

0:24 No. Okay. Yeah. All right. So, you all are up and running now?

--- Purchase decision ---

RYAN

0:29 We are, yeah.

SEAN

0:30 Gotcha. Okay. You feel okay with your decision? Everything's been going smoothly after everything's up and running now or anywhere you feel like BuildOps is lacking?

RYAN

0:42 Yeah. There's a handful of areas they're lacking and working on for sure.

SEAN

0:47 Gotcha. What are those areas?

RYAN

0:51 I'd probably say they're still a little bit buggy on their software. Their workflow process isn't quite established as clean.

--- Accounting integrations ---

RYAN

1:05 Project manager. You know, they had the project management portal or I guess module rather, and that could use some improvement. It's not terrible, but, you know, could use a little bit.

SEAN

1:17 Huh.

RYAN

1:19 Better functions there, but.

SEAN

1:22 Gotcha.

RYAN

1:24 Yeah, there's just little things that need to be improved and developed and a little bit more user friendly and consistent.

--- Paper process ---

RYAN

1:35 You know, as far as having a lot of bugs and such here and there downtime with things just not always working perfectly, but.

SEAN

1:44 Gotcha. So, so you're running some downtime too that I haven't heard too much about that. Has that been impacting all quite a bit or?

RYAN

1:50 Yeah, I wouldn't say too much, no, I wouldn't say much downtime but it's just, you know, downtime is not.

--- Purchase decision ---

RYAN

1:59 Yeah, I wouldn't really say downtime but just bugs here and there that are kind of paying the ask to deal with and slow you down and, you know, but they are responsive typically.

--- *Paper process* ---

SEAN

1:57 Frustrating when it happens.

--- *Purchase decision* ---

SEAN

1:59 Yeah.

SEAN

2:06 Yeah.

SEAN

2:10 I hear you. Well.

SEAN

2:13 Gotcha. Okay. Yeah, that's not.

RYAN

2:14 But yeah, are you guys seeing anybody switch from BuildOps that have made the switch to BuildOps going to service trade?

--- *Purchase decision ends* ---

SEAN

2:20 Yeah, yeah, no, definitely. And, you know, it's typically in like the implementation stage. We've had a lot of people come to us saying BuildOps kind of over promised under delivered. They have a really good sales demo. And then when it's time to, really, when the rubber meets the road, it doesn't always stick like they say it will. So we've definitely had some people show some more interest after being on BuildOps for a little bit. You know, we've been making a lot of improvements to our platform as well. We've released a lot of project management features along with Northboundary, our sales CRM, and that actually prompted BuildOps, to get their own CRM but we haven't heard of anybody really successfully getting up and running now, but it's still pretty new. So, are you all doing any sales and stuff there?

--- *Accounting integrations* ---

RYAN

3:05 So, I've gone through BuildOps CRM plus platform, I guess they purchased. I can't remember the GA, yep. Yep. And it looks, you know, look their CRM plus looks good.

SEAN

3:14 Yeah, that's the one yep. Gotcha.

RYAN

3:24 I just, I'm not gonna jump right into it because the integration needs to be.

--- Accounting integrations ends ---

RYAN

3:30 Better and actually exist. So, right now, I think they're working on their integrations and making it happen, it's not quite up and running or maybe it is now, but when I did the demo, they were a week or two out from actually having the integrate between BuildOps in their CRM plus platform.

--- Accounting integrations ---

RYAN

3:48 But how, how's your guys a sales manager working?

--- Accounting integrations ends ---

SEAN

3:36 Huh.

--- Accounting integrations ---

SEAN

3:44 Gotcha.

SEAN

3:49 Gotcha.

SEAN

3:54 Yeah, no. So it's totally implemented in terms of like the integration and stuff like that. It passes back and forth to service trade with no problem. We have a lot. I think when we acquired Northboundary, they already had like three or 400 customers. So we've gotten some of those people onto service trade and we've totally figured out that integration because I mean, this happened like a year ago.

--- Purchase decision ---

SEAN

4:16 So we've definitely just had more time to figure it out. But at the end of the day, yeah, it didn't sound complicated but then again, I'm not the guy trying to figure that all out. So I'm not really sure but Ryan, you know, it's been a while since we've really met with you and you know, I understand you all are in BuildOps right now, but with kind of what you're telling me, I would love to kinda just show you what we've been up to in the last like year and a half, I think was the last.

--- Purchase decision ends ---

SEAN

4:39 Actually now, it's been like two years since we met with you. So I would really love to get your perspective on how things are going and just meet with my field rep, Clint Mathis for just a quick 30 minute call just to get a better idea of where y'all are at and just how service trade could fit into what you're doing. Not looking for any commitments or anything, but just a quick conversation just to learn a little bit more about where you all are at. Is it's been a while since we've touched base? So I don't know if you have some time like later next week, Clint is going to be traveling earlier in the week. So I don't know if like Thursday you got any availability maybe the morning?

--- Purchase decision ---

RYAN

4:20 Bye.

--- Purchase decision ends ---

RYAN

5:15 Let me take a look.

SEAN

5:24 Because you're actually you're Alaska time. So that's... let me remind myself so you're two hours ahead of pacific, I think, right?

RYAN

5:36 It's eight 30 am right now. I think pacific two hours behind you.

SEAN

5:37 Are you?

SEAN

5:42 Got it. Okay. Yeah. So that would be, so actually Clint would have a demo right? Then we can just do next Friday.

RYAN

5:52 Okay. Yeah, that.

SEAN

5:53 Yeah. So this is getting, this always gets confusing for me because I'm Eastern Standard Time, Clint specific and then you're Alaska. So I always get, my brain is always working extra hard when I have to figure all this out. So let's aim for one at Eastern Standard Time, which should be nine am for you.

RYAN

6:17 Possibly, yeah, that works.

SEAN

6:19 So, yeah, because you all are five hours behind. So yeah, actually that would be nine am, nine am on Friday the seventeenth.

RYAN

6:31 Okay.

SEAN

6:33 Cool. Yeah. So I'll just send you over a quick calendar invite. It's just going to be a Zoom meeting. So when the time comes, you can just click the Zoom link, hop in there, chat with Clint and then if you wanna take any next steps like looking at a demo, we can definitely set that up but, you know, we can always just part ways if you don't think it's worth kinda diving back in. But I definitely would love to just get a chance, to speak with you and just kinda catch up as it's been a while. So I'll send this over and then let me know if you want anybody else to be included in this conversation... or if you just want to start with you and just kinda go from there.

--- Pricing ---

RYAN

7:08 Okay.

SEAN

7:09 Cool. And one last thing actually, how many technicians are you all up to now? I know you were at like 30 something last time we talked.

RYAN

7:18 We're not quite up to 30. We have about, well, I think we have about 20.

RYAN

7:26 Seven field guys. You know, about 20 of them are truly service and then, you know, seven or more on the Construction side.

--- Type of work ---

SEAN

7:35 Gotcha. And then on that Construction center, so that that's like new Construction typically or like any kind of like retrofit jobs like short term install projects.

RYAN

7:46 A lot of those. But, you know, we don't really do new Construction will be larger retro fit and, you know, some medium size like 10 improvements. You know, most of our projects are, our bigger projects are typically under 2,000,000 in... revenue size.

SEAN

8:06 Got it.

SEAN

8:10 Yeah, those are still pretty big jobs, yeah.

RYAN

8:10 But we're looking to grow in that area too, but not really much new Construction bit on some but not super interested, lower higher risk.

SEAN

8:18 Gotcha. Yeah, the only reason I ask our project management is typically best for projects like under six months, that kind of short term, you know, retrofit installed jobs, are really what we're best at, so we can go over that a little bit more in the call next week but just wanna get that. So.

RYAN

8:37 You guys still integrate with last time I talked to you guys integrated with pro core.

--- Accounting integrations ---

RYAN

8:41 Do you guys still do that or?

SEAN

8:43 Yeah. So we're partners with them. So, we have quite a few mechanical companies using them for, you know, their new Construction side, those bigger jobs and then use us for service.

--- Accounting integrations ends ---

SEAN

8:53 So definitely just kind of a best of breed approach with who's best at what? And just use that. So, are you using pro core or?

RYAN

8:59 No, I've looked at it. I mean, before build a kind of came along, I was looking at, I was leaning a lot more towards you guys but also parent with pro core.

SEAN

9:05 Okay.

--- Accounting integrations ---

SEAN

9:14 Okay.

RYAN

9:15 But it's an expensive, you know, doing both platforms can be expensive and you got two different softwares you're operating out of. So, you know, pros and cons, but pro core is a better project management platform... so that I haven't actually used it yet. So.

SEAN

9:24 Yeah, yeah.

SEAN

9:32 Yeah.

SEAN

9:34 Yeah. And I know, you know, I don't blame you for going for kind of the all in one route.

--- Accounting integrations ends ---

SEAN

9:38 I know it can get a little overwhelming with all the different platforms. But a lot of people I've talked to who went that all in one route. Definitely understand now that best of breed approach is, you know, when it's an all in one, the all is, you know, the all is small sometimes. So just because they do everything doesn't mean it's the best of everything. So, yeah, I would definitely like to pick your brain a little bit on kind of what it would look like for a best of breed approach. So I'll get that invite sent over to you right now. And then if you have any questions ahead of time, you just send me over an e-mail and then I have Ryan H, a mechanical inc, dot com still best way to reach in.

RYAN

10:11 Huh.

RYAN

10:17 We actually updated our domain that just Alaska dot come here.

SEAN

10:22 Alaska dot. Okay.

SEAN

10:27 Alaska dot. All right. Cool. Well, I'll get that over to and it's still just Ryan.

RYAN

10:33 Yes. Yep.

SEAN

10:34 Awesome. All right. Great. Well, I'll send this over to you and then I'll give you a quick ring on Thursday just to touch base because I know how things are and things change. So, yeah, I'll get this sent over if you could just click accept when you see it come through. So, I know I got the right e-mail address. I'd appreciate that.

--- Implementation and ongoing support ---

RYAN

10:49 Okay. And I guess, you know, what is your guys implementation timeframe and process and how much typical work is expected of, you know, say us, as we data and clean up and all that?

SEAN

10:57 Gotcha. So, yeah, how much work falls on your shoulder basically during implementation?

RYAN

11:10 Yeah, good.

SEAN

11:10 Got it.

--- Purchase decision ---

SEAN

11:11 Yeah, I can have Clint touch on that a little bit more. He definitely would be a better resource of information for those kinds of questions. So, I'll let him kinda go

over that next week. And yeah, anything else, sir, you think that's kinda the main points you wanna make sure you get through?

--- Purchase decision ends ---

RYAN

11:29 Yeah, as well as.

RYAN

11:33 You know, what is your guys support on, you know, service operations? You guys have a lot of input from industry experience and partnering contractors.

RYAN

11:46 That you can guide and recommend better operating practices?

SEAN

11:51 Yeah, yeah. So I can definitely just kinda sorry, keep going.

RYAN

11:53 Cool.

RYAN

11:57 I was just saying that co, aligns with service trades operation as well.

SEAN

12:02 Yeah, yeah. So, so we definitely kind of put a lot of thought into thought leadership, I guess you could say. So we have a lot of webinars that we put on going over just kind of best practices and what we see from our data of what makes our most profitable customers, why they are.

--- Pricing ---

SEAN

12:19 So we do a lot of kind of case studies and mechanical benchmark reports every year, kinda going over all the data we got the previous year. So I think we've already released it for 22 and maybe even 23. I can't remember if they do like fiscal years or not.

--- Pricing ends ---

SEAN

12:35 So I can send you over just kind of like our webinar page and all the recordings are on there too. So, you know, you can do whatever you want, just kinda peruse them and if anything's interesting, of course, check it out. But yeah, we definitely

have a lot of information and guidance on kinda where we see the best practices are, if you are looking for that kind of information.

RYAN

12:59 Okay. Yeah, I'd be good.

SEAN

13:01 Cool. All right. Well, I'll send that over along with this invite and then we'll talk next week.

RYAN

13:07 Sounds good. Appreciate it.

SEAN

13:09 Awesome. Thanks, Ryan. Enjoy your weekend. All right?

RYAN

13:12 You too. Bye.

SEAN

13:12 Thanks bye.

The End