



# Call with AEPS Electric, LLC - Kristen Connolly

Alec Ashby with AEPS Electric, LLC  
Recorded on 3/1/23 via SalesLoft, 21 min.

## Participants

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

### **AEPS ELECTRIC, LLC**

Kristen Connolly

# Topics

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# Transcript

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

KRISTEN

0:00 Hello, and thank you for calling AEPS. Electric. One of the oldest solar companies on the east coast and a full service industrial and commercial electrical contracting company. If you know your party's extension, you may dial at any time. Please press one for new project, sales, press two, for maintenance repair, and project management, three for accounting for sec, trading questions, five for general inquiries, or you may press the Starkey to dial by name pressing.

KRISTEN

0:33 Please enter the first one or more digits of the last name of the person you would like to call or press star to dial by first name or press zero to return?

KRISTEN

0:47 Please enter the first one or more digits of the first name of the person you would like to call or press star to dial by last name or press zero to return.

--- Call Setup ---

KRISTEN

1:04 Press one four, Greg Stevens, or press two three and name?

KRISTEN

1:13 You selected, Greg Stevens. Is this correct? Press one for? Yes or press two for no?

KRISTEN

1:28 This is Greg.

ALEC

1:34 Hey, Greg. This is Alex from service trade. How are you?

KRISTEN

1:38 Good. How are you doing Alec?

ALEC

1:40 Doing good, doing good. Do you have a couple of minutes by chance?

KRISTEN

1:44 Got it. Shoot.

ALEC

1:45 Yeah. So, I just wanted to reach out. I know you told me last time we spoke that you're planning on having a conversation around early this month, and obviously, we have the demo scheduled for Friday with some of your service staff. So I just wanna touch base to make sure you had everything you need to present that to the parties in that meeting as well as just maybe answer any questions you've had since the last time?

KRISTEN

2:09 No... I think we're on track.

*--- Call Setup ends ---*

KRISTEN

2:16 I don't think I had anything right now because I think.

KRISTEN

2:20 You went over pretty much all the other questions we had in that, the little half hour we spent last week the last week got, I can't remember anymore?

ALEC

2:27 Huh.

KRISTEN

2:33 I think we're pretty much.

KRISTEN

2:37 Right there. I just need, I need my.

KRISTEN

2:41 Field manager to take a look at the software just to make sure to see... how he feels.

ALEC

2:47 Yeah.

KRISTEN

2:48 You know, because obviously, he's going to be the one using it in the field and.

KRISTEN

2:55 We can make some adjustments in the office more easier than he can make them in the field. So.

KRISTEN

3:01 Let me see service trade.

KRISTEN

3:09 I think we covered everything.

KRISTEN

3:16 Yeah, I mean, we really did cover everything that last.

ALEC

3:25 Okay. And...

KRISTEN

3:27 Yeah, yeah, no, we...

ALEC

3:29 You go. Sorry?

KRISTEN

3:31 Yeah, you got you pretty much covered everything.

ALEC

3:39 Okay. And...

KRISTEN

3:39 That's for that's gonna be it. And really, it's...

KRISTEN

3:45 It's going to be his review, and then we should be at the point we make a decision.

--- Pricing ---

ALEC

3:53 Okay. And when do you anticipate that would be?

KRISTEN

3:58 Probably like I said, we were thinking probably by middle of the month. So probably by the thirteenth at the latest, I actually would probably be next week

because when's our meeting.

ALEC

4:13 You're good. I had a meeting I think with Marvin and I think some other folks were gonna come on Friday as well.

ALEC

4:24 That correct?

KRISTEN

4:24 Right Friday morning, 10 30?

KRISTEN

4:28 Yeah, yeah, it'll be me, Christian and Marvin.

ALEC

4:35 Okay. And...

KRISTEN

4:37 Marvin, I mean, we're like we're still pretty small right now, but, you know, we're you know, if things go well this year, it's going to be a little more growing than we were.

--- Pricing ends ---

KRISTEN

4:50 Expecting so, but Marvin is the one that's in control. Everybody in the field.

ALEC

4:57 Yeah, I was about to ask and you said sales manager, is he kinda the sales manager? And the service manager? Is that sales manager?

KRISTEN

5:03 No, Marvin field manager, sales guy that's Dan, he's the owner... and he's literally the last person on our list.

KRISTEN

5:17 It's you know... because the only thing...

KRISTEN

5:23 Dan is gonna be worried about is really the CRM sales using it as sales kind of thing.

ALEC

5:31 Okay.

KRISTEN

5:31 So, it's you know, it's I don't wanna spend a demo with taking up Marvin's time mixing in something else. I wanna focus just on Marvin what Marvin is gonna need it for.

ALEC

5:47 Right. Because it seems like.

KRISTEN

5:49 Cause his time is the most valuable.

KRISTEN

5:53 His time makes us money.

ALEC

5:55 Right, right. Yeah. Yeah. And that was actually one thing I was gonna touch base with Christian, but I'm assuming in that meeting on Friday, you want me to mainly focus on stuff that's gonna pertain to his day to day, right?

KRISTEN

6:09 It's mostly gonna be everything that he's gonna, yeah, what he's going to be able to do... what options he's going to have in the, you know, web app versus what, and everything he's going to have access to and what the guys are going to be able to do with the actual android app or iPhone app?

KRISTEN

6:31 IOS app, whatever.

ALEC

6:31 Okay. So, it seems like that demo on Friday, I would just mainly be around the mobile app and then maybe some stuff he could do in the office.

KRISTEN

6:37 Correct.

KRISTEN

6:39 Right, right. You know, like what the scheduling stuff looks like because he may... have the, he would have the option of moving stuff around because sometimes he comes in the morning and he's got a shift stuff and it's easier if he shifts it rather

than send people out. And then we're like, you know, someone is supposed to be here but they're over here.

ALEC

7:02 Right. Right. Okay. Yeah. So what I was kinda thinking is start off and the mobile app just to show him what his guys could do. And then I was gonna go to like maybe like the dispatch board. I don't know if he, does he do any quoting or is that someone else?

KRISTEN

7:10 Yeah.

KRISTEN

7:16 No, no, no, no, not likely if he ever got to that. I'm sure we could show them how to do it. It's not, you know, or we could always do a little quick training if we're actually running it and doing it, but I wouldn't worry about that.

ALEC

7:36 Okay. And then as far as Dan, it seems like to me that he'd be way more interested in the Northboundary stuff because Northboundary, what? Okay.

KRISTEN

7:45 Right. And that, that's why I wanted to that's why I was looking at the price of Northboundary in relation to, you know, along with the whole thing just.

--- Pricing ---

KRISTEN

7:57 You know, to know what the costs are going to be overall.

ALEC

8:05 Right. And I gave you that, right? I just wanna be sure.

KRISTEN

8:08 Yeah, yeah. You sent me over. You sent us over a full quote?

ALEC

8:09 Okay. Okay.

KRISTEN

8:18 Yes, full quote with northern boundary.

KRISTEN



8:23 Five licenses.

KRISTEN

8:28 Then the migration and setup fees for both.

ALEC

8:35 Correct. Yep. And because what I'm thinking is what we do have for northern boundary, because honestly, I don't really know how, if that's his main priority. I don't really know how much of service trade would really be a good use of his time because I'm sure his time is valuable. What we do have is we do have these webinars like every Tuesday and Thursday on Northboundary, that's with the guy that used to own that company events. He's obviously our employee now and he could go on there and it's pretty, you know, casual pretty straightforward and that could be a little bit more tailored to him since you have actually someone demoing it because I don't really conduct those demos that's kinda more on Vince, but if that's...

KRISTEN

8:58 Sure.

KRISTEN

9:05 Sure.

KRISTEN

9:21 Yeah, no, that's fine. That's...

ALEC

9:24 Sorry, you go ahead.

KRISTEN

9:24 That would, that would probably work.

ALEC

9:32 Yeah, I could send you some information on that because I think, I don't know the times exactly. I think it's something along the lines of like on Tuesdays is at 11 and then Thursdays is at 12. So, I think if he just sat into one of those assuming he kind of trust you guys to look into the service side, I think that'll be because I think you'd really like the Northboundary because if that's his main priority, he's gonna definitely like Northboundary, it's pretty good product for that, so to speak.

KRISTEN

9:58 Right.

ALEC

10:00 I mean, do you agree or?

KRISTEN

10:03 Yeah, yeah.

ALEC

10:07 Okay. And then I'm with that, you know, if you guys do come to a decision either next week or the fifteenth, most likely, you'd be looking at an implementation start date of like four, one or 415 depending on how many slots are taken up. Does that kind of align with your guy's goals?

KRISTEN

10:23 Correct.

--- Pricing ends ---

KRISTEN

10:27 Yeah, that's what we're thinking.

ALEC

10:31 Okay. And I know that you like we spoke a couple of weeks back and you're kinda saying it was between fusion, you know, BuildOps. Is there anyone else that's got in the mix or anyone else that's left the mix or et cetera.

KRISTEN

10:43 No, it's down to fusion right now?

ALEC

10:49 Okay.

ALEC

10:51 Is there a reason that's actually pretty interesting? Is there a reason BuildOps left the equation? Is it just because I think that software is kinda more project management oriented. There's not as much sales and service function.

KRISTEN

11:03 They did not. Yeah, they didn't have BuildOps BuildOps.

KRISTEN

11:10 Yeah.

KRISTEN

11:15 It was kinda mixed. It was price and there there was.

KRISTEN

11:22 A couple of other.

KRISTEN

11:27 Let's...

KRISTEN

11:36 Trying to dig what the hell else?

ALEC

11:40 It's all good. You don't have to dive too deep into it if it's too much trouble.

KRISTEN

11:43 Yeah.

KRISTEN

11:45 No, there was, it was just, there was BuildOps was just something there's a lot of stuff missing for what they were charging. You know, that's the whole thing is why it's taken so long as, you know, looking at, okay, you've got these features. They've got these features. Okay, price wise. Now, do I need that? Do I not need that? Can I survive without that? Do I need to spend the extra money to get that? And, you know, it's trying to put all this stuff together with things that are, I mean, in all honesty, a lot of the stuff there's a lot of things that are different, but a lot of things, but the important stuff is all the same. So.

KRISTEN

12:28 It's comes down to where are we gonna? What are we gonna do? Where are we going with this?

KRISTEN

12:35 You know what I mean?

ALEC

12:36 Right. Yeah. And is your priority still, it seemed like in the beginning the priorities were, you know, managing recurring services, streamlining the quoting process then you like the Northboundary and project management component. Is there anything else there that was a priority?

KRISTEN

12:57 Say it really is our real priority is... the field service tracking... you know?

KRISTEN

13:11 And, and...

KRISTEN

13:14 Doing asset tracking for some of our customers, you know, a lot of our big systems... and then, yeah, doing the maintenance, you know, automating reminders and stuff like that for maintenance and.

ALEC

13:34 Okay. Yeah. Yeah. No, you're good. I know that these things can be a lot well. The only thing I will say is like I told you last time ServiceFusion, they are, you know, typically a more residential software. So, I mean, if those are the priorities. I mean, those are all things that we do pretty well. Is there reason fusions?

KRISTEN

13:34 Yeah, I think I got.

KRISTEN

13:52 Trust me, trust me, I, I'm diving deep into.

KRISTEN

14:03 Both pieces of software. I mean, lots of detailed questions and... what it may have done last year is not, may not be the same as what it does now because it does just about everything we're looking for. Actually, it does everything so far that's why it's between you and fusion.

ALEC

14:29 Okay. Is there?

KRISTEN

14:30 Literally, literally.

KRISTEN

14:33 I mean, it's surprising but they're almost identical in.

KRISTEN

14:39 The base respect, you know, there's little things here and there that are different.

ALEC

14:47 Yeah, does.

KRISTEN

14:48 But... I know two, three years ago, fusion would not have been an option, but they're not the same as they were back then.

ALEC

14:53 Huh.

ALEC

14:58 Right. Okay. Because typically, I hear from people that I talked to that are either considering getting off fusion or on fusion, is that they?

ALEC

15:09 You know, I don't know if they made any updates the platform and typically or not tracking customer equipment and I'm not really sure if they have any Northboundary functionality.

KRISTEN

15:16 Got all that they've got. They don't have the project management.

KRISTEN

15:23 And full CRM style that northern boundary will have.

ALEC

15:28 Huh.

KRISTEN

15:31 But they do have the majority of the functionality we would need.

KRISTEN

15:37 As a, from the project management side on a, you know, a slightly less.

KRISTEN

15:52 Specific, you know, project management specific way, but they don't have.

KRISTEN

16:00 You know, and sales wouldn't be exactly the same. But once again, it's... kind of two different things.

ALEC

16:09 Right right now, I agree.

ALEC

16:13 I mean, are you, do you think you guys are kinda leaning more towards fusion or leaning towards more us or do you have an idea on that yet?

KRISTEN

16:27 We're kinda.

KRISTEN

16:32 We're kinda torn we're back and forth.

ALEC

16:37 Okay. No worries. What, what's kinda got you?

KRISTEN

16:40 I mean, we are, we're that's why it's why we're that's why we got to say that's why we've got our field guys looking at it because it's kinda like, okay, we need somebody to break this down for us.

ALEC

16:54 Yeah, you're good. So like, I mean, I guess what's kind of the main things that's got you torn are the things you got you held up like, is there?

KRISTEN

17:03 It's just, no, it's just the, everything we'll run into the, that like we're focused on in the back office, is we can do with either one?

ALEC

17:16 Yeah, that's interesting. I mean, how does fusion handle the repair quoting or deficiencies compared to us?

KRISTEN

17:30 They're the functionality is a little different, but it does the God now, you know, you're trying to make me think it's very similar.

ALEC

17:42 You trust?

KRISTEN

17:48 I mean, it, it's got options for reporting issues, picture. It's got options for everything.

ALEC

18:00 Okay. Yeah, no, you know, I know we're going a little long here and I called you out of the blue. The only thing... I'll leave you with this one, I can send you an email kind of giving you information about Dan, you know, looking into northern boundary or in doing what he needs to do if he wants to sign up. That's great. But I'll be, you know, I'm not want to like, you know, try to talk on other companies or stuff like that. But I mean, I literally had a company that I talked to last quarter fusion promised them all these things. And now I'm talking to them again and this lady sent me like a list of 12 things that they promised they could do that they couldn't do. With that being said, I understand that they're definitely more on the affordable side

and more flexible with how you get in the door. But I mean, the reason they have to do that quite frankly is because they're trying to get market share, so to speak, but...

KRISTEN

18:17 Yeah.

KRISTEN

18:29 Huh.

KRISTEN

18:39 Sure.

ALEC

18:55 You know, obviously, you guys have put in a lot of attention to that. So, I'm not trying to, you know, steer you in one way or another, but I would just be careful with that is just all I'm saying.

KRISTEN

18:59 Yeah.

KRISTEN

19:02 Hey, you know what?

KRISTEN

19:06 The whole thing, you know, with?

KRISTEN

19:09 Every piece of software I've ever bought in the last 30 years, I've been doing it work.

ALEC

19:16 Huh.

KRISTEN

19:18 You run the risk? I mean, you could end up, you do your due diligence and.

KRISTEN

19:24 Once you install and start using it, you find out that there's that one thing that it does that you can't get past or... it ends up working and everybody's happy.

ALEC

19:37 Right.

KRISTEN

19:38 Literally, it's I mean, we're doing everything we can to look at everything and.

KRISTEN

19:46 You know, hopefully we make the right choice.

ALEC

19:51 Right. Yeah, 100 percent.

--- *Wrap-up* ---

ALEC

19:52 And that's just, yeah, and that, that's just what I'm trying to do is just help you guys make the best decision for your business... so to speak, but as far so, it seems like, I mean, you don't really need anything outside of maybe Dan wanting to talk to me for a bit or talked events.

KRISTEN

19:52 Either way it goes.

KRISTEN

20:10 Not not outside of our meeting Friday.

ALEC

20:15 Okay. Okay.

KRISTEN

20:18 All right.

ALEC

20:18 Cool. Yeah, I'll look forward to meeting with you guys if you need anything between now and then, don't be afraid to ask. I might touch base with Kristen too, just to see if she had any questions tomorrow. But always, nice talking with you, Greg. And, yeah, all right. Cool. Nice talking with you. I'll touch base Friday. All right. Bye bye.

KRISTEN

20:28 Sure.

KRISTEN

20:33 Yep. You too. Alec.

KRISTEN



20:37 All right.

KRISTEN

20:41 Sounds good bye.

*The End*