



Call with Legacy Mechanical - Dennis Hazlett

Sarah Bartkus with Legacy Mechanical
Recorded on 6/13/23 via SalesLoft, 19 min.

Participants

SERVICETRADE

Sarah Bartkus
Account Manager

LEGACY MECHANICAL

Dennis Hazlett

Topics

<i>Call Setup</i>	0:00
<i>Call Setup</i>	8:23
<i>Wrap-up</i>	17:00

Transcript

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--- Call Setup ---

DENNIS

0:00 This is Donna.

SARAH

0:01 Hey, good morning, Dennis. This is Sarah calling from service trade. How are you doing?

DENNIS

0:05 Good. How are you, Sarah?

SARAH

0:07 I'm doing well. Thank you. I am reaching out in regards to a Northboundary demo request that I had received from you. Is, is that still accurate?

DENNIS

0:19 It is, and thank you for the call yesterday and the follow up today.

SARAH

0:22 Perfect. Awesome. Thank you. I do have a quick question. Are you related to... is your company related to a Legacy mechanical in California?

DENNIS

0:27 Yes, man.

DENNIS

0:36 No, no. We're staying alone. Yep, in Denver and we're Legacy mechanical inc and not knowing what they are, but.

SARAH

0:38 Okay. So that's a different account?

SARAH

0:42 Perfect.

DENNIS

0:48 Just this location?

SARAH

0:49 Okay, great. Yeah, we have, we had another account that we've been working with just recently, and that's why I just wanted to confirm that you guys were not, you know, together. So, perfect. Okay, great.

DENNIS

0:57 Yep. We're separate. So, yep, I don't know anything you've talked to talk to them about. So just a little.

SARAH

1:05 Okay. Good. Yeah, I just, I wanted to make sure we weren't stepping on any toes, you know? So, yeah.

DENNIS

1:10 Right. And I think when I sent the email, I pulled them up or something, that was a smart request and I saw them they pulled up on your website or something. So anyway.

SARAH

1:19 Yeah, that may have been because we were like just recently working with them like a couple of days ago before. So I was like, this is very, you know, very likely, but well, let's figure it out. So, perfect. Well, good. I gotcha.

DENNIS

1:32 You got.

DENNIS

1:34 The mystery is solved.

--- Call Setup ends ---

SARAH

1:37 Sorry?

DENNIS

1:38 The mystery is solved.

SARAH

1:39 Yes, the mystery is solved. And I am good to go. And we will get you going here. So as far as what caught your interest in service trade or new boundary or maybe

even both?

DENNIS

1:51 Sure. I'll give you a background. So, one of our peer group partners has your product, so they refer to us.

SARAH

1:55 Yeah.

DENNIS

2:02 And let's just make sure that we match up. We do have a dispatching software for service department. And what drove me to you is two parts and I don't know if they can be separated or how you do things in modules. But I need to be interested in the service preventative maintenance service agreement, quoting software, and sales funnel CRM functionality. So, we currently use BuildOps as our operational software and we have co central as our CRM. I'm very unhappy with cocentral, it's just not what we need. And knowing that you do a full spectrum of stuff, I didn't know if those two things are possible without being fully integrated with the service software.

SARAH

2:18 Okay.

SARAH

2:28 Yeah.

SARAH

2:54 I want.

SARAH

3:02 Yeah. So there is a potential for that. It kinda depends on how you're using things. So, are you guys a lot of times when people are using BuildOps, they're more of like a Construction company, do you have? But you also did mention you have service as well. So I'm trying to figure out as far as your company goes. Do you have like separate divisions of like service? And do you have a Construction side or? Okay.

DENNIS

3:11 So...

DENNIS

3:27 They're they're we do have a Construction side. We are depart minimized but not visualized.

SARAH

3:37 Okay.

DENNIS

3:38 So in the Construction side, we use pro core as our interface to build things, but our service, and we'll call it special projects.

SARAH

3:45 No.

DENNIS

3:52 Are all being managed under BuildOps? Actually, it's a messier than that, but we do have a Construction side, special projects and service, and...

SARAH

3:58 Okay.

SARAH

4:04 Okay.

SARAH

4:06 Okay. So, for the service and special project side of things, I'm assuming that's mostly what you're focusing on at the moment, is that correct? Okay. Perfect. Okay. So with this in mind here, how many technicians do you have for that department?

DENNIS

4:14 Yes, ma'am.

DENNIS

4:20 It's... it's fairly small.

DENNIS

4:26 I think it's fair to say we're five people.

SARAH

4:29 Okay. Not bad.

DENNIS

4:31 It, it flexes, but really, I have one, one salesperson selling service agreements and one salesperson selling projects.

SARAH

4:43 So, two total sales?

SARAH

4:47 Excuse me, two total in your sales department or sales side of things... one selling projects, perfect, one service and typing all this information down. This is gonna help get you in the right place. So.

DENNIS

4:51 Yeah.

SARAH

5:03 Okay. And as far as go ahead.

DENNIS

5:04 Yeah, yeah. No, go ahead. I work fairly tomorrow.

SARAH

5:10 No, that's okay. I mean, hey, you gotta start somewhere and, we can definitely help you grow that as well. If that's something you're looking to do as well. So.

SARAH

5:20 I mean, that's what you have a sales team for, right?

DENNIS

5:23 Right.

SARAH

5:24 Exactly. So, yes. Okay. And then essentially what you're looking for is the PM agreements quoting software also to integrate with the sales side of things. And then.

SARAH

5:39 So as far as what we have to offer, so it sounds like you're gonna need a combination of... service trade as well as.

SARAH

5:52 Northboundary and our, it M, can kind of talk to you a little bit more about how that would work. And then you can decide for yourself if you just decide you want only Northboundary, but I think that you would actually... it's yeah. So it's the it's our, it's the same company. We own Northboundary, but like, we took them in as our own. So it is part of our platform and we can sell them separately. But just from what you're telling me here, it sounds like, you would actually really enjoy the way that they work together so you can find out for yourself with me when you talk to the territory manager, but I'll go ahead and set you up with a demo and let them know that you're interested in Northboundary as well, and they can have a discussion with you about how that works.

DENNIS

6:05 It's two different products. Is that what it?

DENNIS

6:40 So, yeah. And the different Northboundary is your quoting software in your sales funnel. Is that what?

SARAH

6:47 Yeah. So Northboundary is gonna be the more like heavy on the sales side of things, whereas the service trade part is gonna be more of service, PM agreements, quoting kind of all that stuff as well as a customer portal for your customers to go in. And, you know, see what you guys have done, what you're doing all that stuff paying?

DENNIS

7:09 And, that one, is of less interest unless I'm missing something because we went so far down the road with BuildOps. I'm heavy on the sales side. Yeah.

SARAH

7:21 Okay. So you're saying that maybe.

SARAH

7:24 North?

SARAH

7:27 You said you're heavy on the sales side. So not so much on the service part of the.

DENNIS

7:29 Yeah, that's well, I already have a service software. I just don't have a quoting in sales funnel that I enjoy.

SARAH

7:35 Right.

SARAH

7:41 Okay. Well, I'll go ahead and put that in my notes.

SARAH

7:54 Okay.

SARAH

7:59 And is there anything else before? I sorry, go ahead.

DENNIS

8:00 Yeah. So that makes it kinda tough, and pricing it because I, you know, I basically have two people using it for what we're trying to accomplish and that's not power users. And looking at this, it's done by service technician number. Is that how you price it?

SARAH

8:19 That is for the service trade, part of things, this is a Northboundary, so, you, I mean, you'll still definitely qualify as a customer that, you know, could be a potential user.

--- Call Setup ---

SARAH

8:34 So, so long as, you know, we'll see how, the demo goes with, the territory manager and they'll discuss more in depth to make sure, you know, we both feel that we're a good fit for each other. You know, we're not gonna sign you on unless it's good for both of us. So we are going to get you set up here. I'm looking at my calendar right now.

DENNIS

8:23 Okay.

DENNIS

8:27 Okay, great.

DENNIS

8:40 Sure.

DENNIS

8:45 Right, right. Thank you.

SARAH

9:02 Are you more of a morning person or afternoon?

DENNIS

9:05 I'm good either way.

DENNIS

9:13 Tomorrow today and tomorrow are really good for me. Friday is out.

DENNIS

9:22 Thursday, the possibility if it's earlier than late.

SARAH

9:27 Okay.

SARAH

9:30 Just one moment here. And as far as the equipment you guys are primarily working on or selling, what kind of equipment is that?

DENNIS

9:40 No particular brand name, but it would be all H back, you know, air handlers to boilers and showers, just... not a specific brand, if that's...

SARAH

9:55 Yeah, no, that's fine. No, it just depends on how we kind of show you how it works as, by like the equipment because everybody's companies work a little bit differently depending on what you're doing?

DENNIS

9:55 What you're asking? Yeah, Rob top to boiler.

SARAH

10:11 They just change some of that.

DENNIS

10:11 Not manufacturer specific.

SARAH

10:14 Sorry?

DENNIS

10:15 Not manufacturer specific, but a major components of a.

SARAH

10:18 Yeah, no, that's okay.

SARAH

10:21 Sure. And are you guys pretty much all commercial as well?

DENNIS

10:26 Yes.

SARAH

10:27 Perfect.

SARAH

10:29 Okay. They just changed the territories on us. So just a moment here. So you said I know I was like finally started to remember everything and then they changed around on us recently. So I just wanna make sure I get you with the right person. So we don't have a mistake here. So you said you're in, I'm sorry, Colorado.

DENNIS

10:34 That's fun.

DENNIS

10:48 Colorado. Yes, man.

SARAH

10:50 Perfect. Okay. Got it. Gotcha. All right. Going to get you with our territory manager meta.

SARAH

11:05 And I'm sorry, I know we were talking. You said that you're in Colorado is Pacific Time... not pacific mountain Mountain Time?

DENNIS

11:12 Right. Is in mountain?

DENNIS

11:15 Yup.

DENNIS

11:18 Where is?

SARAH

11:21 She is on the east coast? Let's say yes, but she works with all of our west coast. She's a early riser too. So.

DENNIS

11:24 Is, so...

SARAH

11:33 She gets up and runs three Miles every morning. I'm like that's crazy.

DENNIS

11:33 Two hours?

SARAH

11:38 Yeah. So you guys, what time is it right there right now? It's...

DENNIS

11:42 I'm nine 30 right now.

SARAH

11:45 Nine 30? Okay. Here we go. So, daylight time, okay?

DENNIS

11:47 Two hours difference? Yeah.

SARAH

11:51 There's two Mountain Time, so I would like to confirm that. So, as far as you were saying, I'm sorry you were talking about morning. What were you saying about Wednesday tomorrow? Is that, is there any available?

DENNIS

12:00 Yeah, I can go today or tomorrow. She probably need some time so I could go.

SARAH

12:08 I do actually have some time today if you wanna do like afternoon, but if tomorrow morning is good, I can do eight a. M or nine am on there.

DENNIS

12:15 What do you have today? If she wants to dive in? Tell me?

SARAH

12:24 Yeah. So today, I've got as early as 11 am to.

SARAH

12:33 To 12, 11 to 12.

DENNIS

12:37 Window...

SARAH

12:38 And that's the window. Yeah, she's gonna doctor appointment and then there's like a little bit of time afterwards, but, I don't wanna, yeah, it'll be for today. 11 am to 12 is gonna be kind of the best time.

DENNIS

12:46 And then tomorrow, you've got eight am mountain nine am. What did you say?

SARAH

12:55 Yeah, I've got eight between eight to nine am around that time. So like eight, eight am or nine am, which one, which ever one?

DENNIS

12:59 Let's do that.

DENNIS

13:04 Let's do.

DENNIS

13:07 Eight am.

SARAH

13:08 Okay. All right. So I have eight am, so we're gonna give you a you're gonna get an email. It's going to have a demo.

SARAH

13:19 Excuse me a Google calendar invite on there, and it's gonna say a full hour block. They don't normally always last that long, but we like to give that block of time just in case... and I do like to make sure that people also click accept on there. Just that way. I know that you've received it. And then I don't have to bother you.

DENNIS

13:40 Great.

SARAH

13:40 And I do wanna make sure I have your email here as dhazlett at hotmail, dot com. Is that the best one?

DENNIS

13:51 It is, but let me give you my work one that is personal.

SARAH

13:55 Okay.

DENNIS

13:56 It's it's...

DENNIS

13:59 Well, it's weird why did I do that? In fact? That's not even the right email. It's DH a Z. Let T...

DENNIS

14:09 Legacy Mechanical dot.

SARAH

14:18 So, dhazlett, at Legacy Mechanical dot com.

DENNIS

14:26 Yes, man. The other one I transposed, it was half of my personal email and half of my.

SARAH

14:27 Perfect. I'm adding that in.

DENNIS

14:34 Business email that was, must have been, didn't have coffee or something.

SARAH

14:34 No, that's okay. Shoot. Hold on one second.

SARAH

14:47 Of course.

SARAH

14:53 I just have to retype this something. We just one second because I was, I don't know what happened there, but.

SARAH

15:01 Okay. Legacy dash mechanical, make sure I spelled everything right? Every go. Perfect. Okay. Good. And then did you wanna add anyone else to this meeting as well?

DENNIS

15:13 I can invite them in here, but it really?

SARAH

15:15 Okay. Yeah, that's completely fine. Sure.

SARAH

15:20 Okay.

SARAH

15:30 All right. So, I am booking the meeting as we speak.

SARAH

15:37 And just going to confirm everything came in on my end correctly.

SARAH

15:45 No...

DENNIS

15:51 Right. I go to.

SARAH

15:53 Okay. I'm so sorry, I think I might need to redo this real quick. I'm so sorry. No, I don't know what happened. I think there was like a glitch earlier when I said that, the thing messed up and then.

DENNIS

16:00 Okay.

SARAH

16:09 It messed up my whole calendar and I didn't realize that I know. I'm so sorry, I appreciate your patience.

DENNIS

16:11 No.

DENNIS

16:15 Okay. I'll just, I'll delete this. Fine. Who's that?

SARAH

16:23 For some reason, it's just not showing... her on there anymore, which I don't understand.

DENNIS

16:33 Busy...

SARAH

16:37 Yeah, I'm probably just gonna have to add her on there. I might.

--- Call Setup ends ---

DENNIS

16:43 We can pick it, is it better at nine or something? Is she available at a different time?

SARAH

16:46 No, she, I mean, she was available. I just said her name just completely disappeared off of the.

SARAH

16:55 Off of the list and it's like really weird here. We go. Okay. Now, it's back on.

--- *Wrap-up* ---

SARAH

17:00 Okay, good. Sorry, I don't know what happened there. Maybe there was definitely some kind of glitch in our calendar system, but don't worry. I got you. Okay. Give me just one second. Okay?

DENNIS

17:07 Okay.

SARAH

17:09 Tomorrow.

SARAH

17:12 Make sure we got your...

SARAH

17:14 Time zone in there.

SARAH

17:17 At least it's gonna be a lot faster this time because I already know what you want. So.

SARAH

17:23 Tomorrow at nine am your time. Wait, you said eight eight a M your time?

DENNIS

17:29 Yeah.

SARAH

17:30 I got your...

SARAH

17:47 Legacy Mechanical dot co.

SARAH

17:51 Good. Adding you in there. We've got meta, we've got eight a. M. We got everything. Okay. Perfect. Okay. Sending now, so this will be the correct one. I do apologize about... the thing there. Whatever happened there. Everything should come in good now. And, yeah. So, I also have wait, you said all you guys do all commercial? Did I ask that all commercial H back? Okay?

DENNIS

18:02 All right. Fingers crossed.

DENNIS

18:14 Yeah.

SARAH

18:21 Mostly Northboundary, okay. All right. Great. Okay. Well, Dennis, it has been a pleasure. Thank you for bearing with me there. Is there anything that you'd like me to add real quick before we hop off the phone just, for me to, just to prepare for you guys meeting?

DENNIS

18:21 All right. I got your email.

DENNIS

18:38 No... I look forward to it. I got it. I fix after it and I'll be ready for tomorrow.

SARAH

18:46 All right. Sounds good. Thanks, Dennis. Have a great day. Thanks bye.

DENNIS

18:49 Thank you. Bye bye.

The End