



Call with Infinity Contractors, Inc. - Jim Stagg

Ben Bilhorn with Infinity Contractors, Inc.
Recorded on 5/26/22 via SalesLoft, 17 min.

Participants

SERVICETRADE

Ben Bilhorn
SDR

INFINITY CONTRACTORS, INC.

Jim Stagg
President

Topics

<i>Pricing</i>	1:30
<i>Pricing</i>	9:46
<i>Wrap-up</i>	16:23

Transcript

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

JIM

0:01 Hey, this is Jim.

BEN

0:02 Hey, Jim. This is Benjamin with service trade. How you doing?

JIM

0:06 Hey, management doing well.

BEN

0:08 Good, good. I want to reach out. You had met with one of my colleagues from service trade a while back. I think regarding our platform and it's been a little while since we last spoke. So I wanted to get back in touch. Yeah, just kind of, you know, get to meet with you on the new territory manager for south central United States over here at service trade. So I wanted to see if you guys had ended up finding a service platform that work for you guys. And if not, yeah, you know, ask a little bit about your service process. I guess. Do you have a quick moment for me?

JIM

0:47 Yeah, I gotta get all here in just a sec, you know, thanks for reaching out. I know we had talked previously, the current status our service group is failed to put on really any.

JIM

1:01 Level of new technicians has been just, you know, finding good folks has been hard in the yard. So we're still dealing with the crew that half 12 service technicians. We have upgraded our software internally from the old operating plan. I should say the, all the enterprise software we were using at us really just based on Construction job cost. Now, we're inside of the service management module in stage 300. So... that's kinda of now I'm gonna say we're so we're kind of like, you know, moving over to I wanna say a little bit better platform and just managing our workload.

--- Pricing ---

JIM

1:41 So the idea of getting to a field solution is slightly convoluted, the nature of our company purchase last summer. So I'm there, they've been very, you know, kind of cautiously I'm trying to incorporate a across the board, you know, kind of solutions.

So like on the constructions they're trying to get pro core implemented on the service side. They have not, yeah, they haven't really made a decision, but they also haven't really one of the organizationally they have decided to stay with Sage like they had different companies and different software. So for us, that's kind of helpful and that we were already on page 300, but it's going to be moving to Intacct, to the cloud base, going forward in the near well in the next six to 12 months. But in that discussion, one of the elements is just to kind of rule in or out of the SSO model. And so that is Sage service operations, I guess. And so we, because we have such a small amount of folks and since we are already on the Sage service management looks like we may be getting kept to just put that in a trial mode for our group. Now, I know that one doesn't necessarily, you know, completely eliminate the other but walking before we can run we, but, you know, kind of like the rule out whether or not we're going to have to do that demo or whether we are free to do anything different in the meantime. So, so anyway, this is a terrible time of year to start implementing new things and per service technicians for us or for Texas, but that's kind of where we're at.

BEN

1:30 Okay.

BEN

2:06 Yeah.

BEN

2:41 Yup.

BEN

3:18 Right.

BEN

3:20 Yeah. Gotcha. Well, you know, I think a couple of things I wanna say first of all, I know pro core is a partners, right? So that's something where we have like a native integration here. We have an integration with pro core and we also have a native integration with Sage intacct. So if you guys are into that, we'd be a really strong choice for a service module that works well with that.

BEN

3:48 Kind of beyond that. Though. So, you know, I guess you guys are moving to SSO... considering moving to SSO, it sounds like that has not been implemented yet. Is that right?

JIM

3:49 Okay.

JIM

4:01 Right. Yeah, we just basically got on service management about a month ago.

BEN

4:05 Gotcha. Gotcha. Okay. And so when you say you got on Sage service management, what does that means? That? Like you guys did the whole?

JIM

4:15 I 100 percent 100 percent ERP driven. So all of our functional financial software, it was tied up in kind of the Construction platform of Sage. So the job costing module. So it moved it over to where now we're able to do like TNM tickets and quoted work in warranty and service agreements. None of that was really part of the job cost a month. Yeah. So it's just allowing us to functions, you know, financially tracking, you know, of the things that go on and service, you know, where you actually get service metrics and that kind of thing. So, not at all user interface, not at all technician interface, just 100 percent, you know, where we're pulling po is from and where we're issuing work orders, all that?

BEN

4:30 Right.

BEN

4:41 Okay. Gotcha.

BEN

5:00 Right.

--- Pricing ends ---

BEN

5:07 Gotcha. Gotcha. Okay. Understood. And do you know kind of with the company looking at intact, you know, when that kind of process is gonna start, I get or any, is there any, you know, push towards that right now? Or is that something that you guys are just evaluating currently?

JIM

5:31 Yeah. So, you know, with my role, I, I'm Lee at, you know, I lead the Infinity contractors, you know, level of the organization which is based in DFW and has a local market for Construction service, but we were bought last year. So quite a long mechanical and controls has about probably get close to like eight to 12 companies that had been incorporated over the last, you know, five years. So when we say the company is considering so pueblo as a whole has a much more robust company presence in Arizona. We were there first reach out in Texas since then they've got another company in south Texas and one in Utah or to a new done now. So you're dealing with is kind of the growth of the playbook organizations saying, yeah, we're going to move to pro core. So they have signed agreements with broker, but that's only gonna affect the Construction side of the business and it's gonna happen in phases across the group. And so same thing they've decided to go to intact for Sage, that's gonna start employee below because they're trying to get rid of a points system there. So it'll work its way through the organization as they can go through there, you

know, update, you know, getting everybody on the speed. So we'll be, you know, we would be a later part of that because we're already on in tax. I mean, saved 300. So. So it's just all in phases and it's all in. When you talk about pro core, that kinda goes all the way up to the CEO owes kind of wish list Scott meter when you say intact for, you know, for Sage that goes all the way up to the CFO, Bill Markley as his wanting to have, you know, all the financials for consistently. So if you kind of have, you know, obviously varying levels and very, you know, emphasis within the company. Right now, we've kind of arrive that we're almost a year into the, you know, kind of merger. And we're just now learning that kind of use the same metrics and language in that can be also, yeah. So that's kind of where we're at. Not really. Like I said, we're likely to get past to try SSO because it's a, you know, an easy S a S to try out where we're at. But I've been trying to avoid that at the moment because we basically just need to get more technicians under our belt. I mean, I don't have time to go get more work. I mean, you know, can't go get more work if I don't have guys they executed. So, so this is really a lovely next step when we get there, but it's not the top of my heap right now. So...

BEN

7:00 Gotcha.

BEN

8:00 Right.

BEN

8:06 Right. Right. Gotcha. Okay.

BEN

8:12 Interesting. I think we actually had met with this. It looks like we met with the pueblo as well.

JIM

8:19 Yeah. So those are really the guys were, so, you know, for all intents, they, they're organizationally they've got the, you know, the reach and the decision making to have what's gonna happen across your organization. You know, there's minor things I can do it. It's not going to be at all, you know, kind of like it's not going to be the decision to do the whole group or whatever. And so... so in meeting with them, you know, and kind of figuring out, you know, because my understanding, and here, you know, this is just the marketplace for software. My understanding is that when you have Sage intact, you don't necessarily have their service solution there. That is that, that's something that say just still developing for their cloud. So, it sounds like with SSO, that will be their cloud based service map module. So like it's kinda like that pending going to happen because by the time they offer based service module, it's going to be assets. So, alright, so I'm still only have the, you know, the limited features and benefits that it has and the way that it operates and it doesn't attract, I mean doesn't attempt to do all the interaction you know, with the.

BEN

9:14 Right. Yes.

JIM

9:41 You know, multiple touches to the customer, you know, in the workflow for technicians and that kind of thing.

--- Pricing ---

BEN

9:46 Gotcha. Gotcha. Yeah, I will say, I don't believe SSO though, so that I've run into for the most part is not cloud based or at least it's not available.

JIM

9:59 No, I'm sorry, I'm not trying to confuse. I'm trying to say that in their software for Sage, you have stage 300, not cloud base and SSO, not cloud based. But now you have no service offering out of Intacct. So, so when they bring in service, you know, asset when they bring in a service to the impact, I'm expecting they're going to do that through, you know, the idea of the SSO package that they're basically saying this is the software that's going to be cloud base when they get there.

BEN

10:12 Right.

BEN

10:16 Right.

BEN

10:35 Gotcha. Gotcha.

BEN

10:39 See, I see. Okay, gotcha. And is it confirms that impact... is the next move? The next step?

JIM

10:51 Well, you know, the confirmed I'm kind of deal is a moving target around here. We get zero zero feedback. You know, I'm gonna say, hey, prior to decisions being made, we kinda get a monthly check in on how we're doing and a obligatory, hey, we're looking at this and this. So we really don't know how far I, what I can tell you is they make decisions in line along the lines of we're going to move to pro core and everybody starts paying for pro core. And then you hope you get a chance to try it out and implemented before the end of the year because you're already paying for it. So there might be a few little dysfunctional models in there.

BEN

11:03 Gotcha.

BEN

11:26 Right, right.

BEN

11:30 Gotcha. Gotcha. Okay.

JIM

11:33 So, I just share all that. I mean, you really, Ben, I really believe that, you know, it's grabbing the pueblo world, probably a big win for service trade. Obviously, it's a big uphill battle to like a lot of moving parts and partners in that. But that being said, you know, if I'm going to have any candidates say so of trying to get anything implemented and try it out and demoed, I, it's been top of my head. I mean, I would kind of see that probably and possibly in the fall, you know, we get through somewhere we get me SSO implemented or not like we get that decision done.

--- Pricing ends ---

JIM

12:07 And then we've got some capacity to move into say, hey, let's see if we can improve our user experience, then that would be a really great time to, you know, kinda picks up.

--- Pricing ---

BEN

11:42 Right.

--- Pricing ends ---

BEN

12:18 Gotcha. Gotcha. Okay. Cool. Last question. Did they tell you anything about BuildOps? Does it sound like that might need to move? That might be good?

JIM

12:31 You know, it's a C. I think my only familiarity with BuildOps, you know, it has been more of a project related. So I can't say organizationally anything they've looked at, I, it would be, yeah, it wasn't something that.

JIM

12:47 It wasn't part of any kind of conversation that I was aware of. So, no, I don't really, and I'm not familiar with it either. I mean, outside of it being kind of maybe similar to pro core or something like that.

BEN

12:50 Gotcha. Gotcha.

BEN

12:58 I just, I know it got brought up in the conversation that my colleague had with forever. So that's why I'm what I'm trying to figure out just like what?

JIM

13:06 Yeah, gotcha. Yeah. So who are you speaking to a flavor?

BEN

13:11 So, it looks like, so my colleague, Mary Beth, she's like big like outside rep for service trade field person that's out there during the companies, let's actually met with William marketing, which I think has been on weight. And then Steve, Karen.

JIM

13:30 No, right.

BEN

13:31 And then bonny.

JIM

13:34 So, Steve is definitely there service guy in Arizona, you know, that it's been there for a bit and Bill Markley is the CFO. So he's you know, he's the one that's making all the decisions about Sage intact or, you know, that kind of stuff.

BEN

13:38 Gotcha.

BEN

13:48 Yeah, it sounds like it's it looks like a lot of this conversation was with Steve.

JIM

13:53 Okay.

BEN

13:54 Gotcha. So he's he said he's the guy in Arizona.

JIM

13:56 Well...

JIM

13:59 Yeah. In, so the one thing that he's struggling with is that the decision to get rid of columns was made some time ago. So, the one thing they decided they didn't really say, hey, we're going to move all the stage. They said we're going to continue

with coins. And so, I think that's what left service saying. Okay, what does this look like if we're going to? And so, just because Sage intacct has have a true service cloud solution, just like you said, that's probably where, you know, there was probably some Steve reaching, you know, what like other options, you know, kind of thing and stuff. And I think that's the one downside to the whole conversation is the maturity as an, to say the level of maturity of the ERP portions of these companies that are being picked. Up. So, knowing that service trade is not that, which is great. Not having a clean interface on the ERP side that everybody's kind of, you know, using, we don't have that common language across organizations kind of like, you know, you kind of stumble into something that's big enough to be, you know, whatever you wanna say, 200,000,000 whatever in revenue, but you don't have that consistency across, you know, it doesn't offices, you know? So that's kind of, I mean, I think that is kind of the battle at the moment.

BEN

14:35 Yeah.

BEN

14:48 Right.

BEN

15:04 Right.

BEN

15:16 Right.

BEN

15:21 Gotcha. Gotcha. How recently when you guys acquired by a program?

JIM

15:26 I picked up a year ago, July one? Yeah.

BEN

15:29 Okay. Gotcha. Yeah, wow. Okay. Gotcha. So, kind of pretty recently, and it sounds like they're kind of in the process of picking up a lot more companies.

JIM

15:40 Well, there. Yeah. So I mean, their whole ambition is centered around the buy and build strategy of they're trying to make sure that they don't lose any employees or customers in the process. And then they had to go out the service side, which the service side with boats really well, obviously per service trade if they really get there if they really get there or is in the water on that. But I think that they figured out is it takes a lot of effort to Eric company and just keep it not going backwards in the process. So, I think their turnaround time is probably a little bit longer than they expected, you know, to get moving into the new... you know, anything, any new improvements?

--- Wrap-up ---

BEN

16:23 Gotcha. Gotcha. I see.

BEN

16:28 Okay. Well.

BEN

16:31 I appreciate all the info on this. I definitely think you said it probably like, you know, early fall around that time would be a good time to try to get back in touch and, you know, need to talk with you and talk with some people from table as well about there.

BEN

16:51 You know, I think he cannot over there.

JIM

16:52 Yeah.

JIM

16:54 Yeah, that sounds good.

BEN

16:56 Cool. Cool. I can definitely do that. In the meantime, you know, stay safe, don't work too hard. And yeah, I appreciate all the getting pointed in the right direction, I guess.

JIM

17:07 Hi, Ben. Take care.

BEN

17:09 You too. You too. Bye-bye...

The End