



Call with Marick Incorporated - Mark Totino

Tommy Polcari with Marick Incorporated
Recorded on 6/23/23 via SalesLoft, 6 min.

Participants

SERVICETRADE

Tommy Polcari

Associate NorthBoundary Account Executive

MARICK INCORPORATED

Mark Totino

Topics

<i>Accounting integrations</i>	1:52
<i>Type of work</i>	2:08
<i>Type of work</i>	2:55

Transcript

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MARK

0:00 Hello, is Mark?

TOMMY

0:01 Hey, Mark. It's Tommy pull carry with service trade. Do you have a quick minute?

MARK

0:05 Sure.

TOMMY

0:07 Yeah, thanks. I appreciate it. So, I was looking to follow up with you. I saw that you had requested a meeting online. So I just wanted to follow up with you and see if we could, you know, set up a time for you to meet with the territory manager and just get a better idea of what you guys are looking for.

MARK

0:21 I mean, is this for Northboundary...

MARK

0:25 I, I'm not sure what I signed up for, sorry?

TOMMY

0:25 Yeah. So service trade acquired Northboundary recently? Yeah.

MARK

0:32 Okay. So, is it still called Northboundary, I guess I didn't know that.

TOMMY

0:37 Yes, it's still called Northboundary.

MARK

0:39 Okay. Yeah, I definitely wanna talk to somebody. I mean, we're looking for pricing. I mean, we belong to, the after group and I know that there's been some contractors and I have actually used Northboundary before when I was with another

contractor. So I, yeah, I definitely wanna talk to somebody and try and get some, see what the pricing is and go from there.

TOMMY

0:47 Okay.

TOMMY

1:03 Gotcha. Okay. Yeah. So I can definitely set you up with your territory manager, Michael manna. I'm not sure if, you know, you guys are available today, but he does have some times open this afternoon around one 30?

MARK

1:08 Huh.

MARK

1:13 Sure.

MARK

1:17 Yeah. Let's let's do it. I'm actually, I does. He, would, it, would you be able to do two o'clock...

TOMMY

1:17 Okay. All right. Perfect.

TOMMY

1:25 Let me see. You guys are Central Time, correct?

MARK

1:28 Yeah.

TOMMY

1:31 He could do?

TOMMY

1:34 Two 30 if that works?

MARK

1:37 Yeah. Let's go ahead and do two 30.

TOMMY

1:40 Okay, perfect. We'll do two 30 Central Time.

TOMMY

1:44 And then what would be, is the best email?

TOMMY

1:49 Totinoat, me dotcom?

--- Accounting integrations ---

MARK

1:52 Yep. Exactly.

TOMMY

1:54 Okay, perfect. So that's where I'll send the invite and then I just wanted to get, you know, a better idea of what you guys are currently using, if you could, you know, explain, you know, what processes you guys are using, you know, or if you guys are using any CRM or anything like that?

--- Type of work ---

MARK

2:08 Well, okay. So just kinda give you a flavor. We are, we're expanding hvac to an existing refrigeration company and that's traditionally, what they've been doing is refrigeration. And so I'm basically mid task to make and grow the hvac side of it. As far as the CRM goes, they have no CRM.

--- Type of work ends ---

MARK

2:30 So we have, well, I take that back. We are using atlas, but that's not really a true CRM. So, and as far as processes probably zero to none. So my job is to try to implement some sort of processes and procedures and standards and, you know, to try and grow the maintenance base here locally. So.

--- Type of work ---

TOMMY

2:55 Gotcha. Okay. I totally understand that. What, what percentage would you say, you know, is planned or proactive versus reactive work?

MARK

3:05 10 percent proactive, 90 percent reactive. That might be a little bit. It might be more like 20, but I mean, it's pretty reactive right now.

TOMMY

3:10 Gotcha. Okay.

TOMMY

3:17 Gotcha. Okay. Are you guys trying, to do more plan maintenance and get ahead of that work?

MARK

3:21 110 percent that's what that's I mean, that was my former wheelhouse. I know, you know, I saw him jumping into a situation where it was planned maintenance versus reactive maintenance. Yeah.

TOMMY

3:31 Right.

TOMMY

3:35 Gotcha. Okay. And then about, you know, how many dedicated salespeople do you guys have at the moment?

MARK

3:41 We're gonna have, we're at while it's myself. And then we're adding another one. So we'll have two. And then we've got, you know, our project managers, and service managers. Well, they sell two. So we kinda, we really only have a couple right here locally. Now, we do have four branches. So we've got Omaha demoinies which, and so fall so I can't speak on the rest of those. But there's definitely, you know, definitely, we could have, you know, I could say potentially three to four sales people on the platform?

TOMMY

3:54 Okay.

TOMMY

4:08 Okay.

TOMMY

4:20 Gotcha. Okay. All right. Perfect. And then on the service side, just curious, do you know what you guys are currently using for the service side? Like work orders, you know, service history, quote and things like that.

MARK

4:32 Yeah. And that's not gonna change. So that's a BuildOps. So that's yeah, that's what we use and we're not that's probably not gonna change.

TOMMY

4:37 Hello. Got.

TOMMY

4:42 Gotcha. Okay. Do you mind me asking? Just curious how long you guys have been using them for?

MARK

4:47 About, I don't know, I think about six months but it's kind of a, because of the group that we belong to, that, that's the platform where we have to use.

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

TOMMY

4:59 Gotcha. Okay. All right. Perfect. Well, I will pass along that information to Michael. And then as soon as we hang up, I will send over that calendar invite if you could do me a favor and just said accept. So I know you received it that'd be great.

MARK

4:59 Yup.

MARK

5:11 Yeah, because I do know that there's some other contractors in the group, that integrate, you know, they have the build up in the Northboundary together and I guess it works okay, you know, so, but yeah, I'm looking for. So who's going to be calling? Is it going to be? Is this going to be a Zoom meeting or is it?

TOMMY

5:26 Yep. So it'll be a Zoom meeting, the invitation that I'm gonna send to you that will have the meeting link in it in the description. And then you can just click that and it'll, join the meeting and you'll be meeting with Michael melino. He's the territory manager for your area.

MARK

5:32 Okay.

MARK

5:40 Perfect. Looking forward to it.

TOMMY

5:42 All right. Awesome. Sounds good. We're looking forward to speaking with you.

MARK

5:45 All right. I appreciate it bye.

TOMMY

5:47 Yep. Have a good one bye.

The End