

Frontier Mechanical & ServiceTrade Consultation

Brooke Caskey with Frontier Mechanical Recorded on 2/22/23 via Zoom, 33 min.

Participants

SERVICETRADE

Brooke Caskey
Territory Manager

Sean Jenkins SDR

FRONTIER MECHANICAL

Megan

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BROOKE

o::00 Hey, Megan. Hi, how are you? I'm doing well. How are you, James? Perfect. And are we waiting on anyone else for this conversation or is it just you and I today? You and I today? Perfect. And then... I've got you down as service sales director. Is that the correct title? Yes. Cool. Well, Megan, thanks for taking a few minutes to chat with me before our demo tomorrow. My name's Brooke. I am the territory manager that covers the northwest and I'll be doing our demo tomorrow with you and the rest of the team. But I wanted to take this time today to learn a little bit more about you, the other members that will be joining tomorrow, if any, the company background and really the business goals for the year and the initiatives for looking at software. So I thought we can have a quick chat about that today. If that sounds like a good plan. Sounds good. So for you as the service sales director, what does that mean at your company? Like what are you covering on a day to day to day?

MEGAN

1:08 So I've got a couple of sales account managers beneath me basically who are out knocking on doors trying to bring in new customers and they report directly to me. So I'm kind of here to guide them, help train them on that whole process, answer obviously questions I have, and just help overall with the sales for the company.

BROOKE

1:34 Okay, cool. And you mentioned that they're knocking on doors trying to acquire new business. Am I right that you guys are 100 percent commercial? So does that mean that they're like walking into different businesses trying to?

--- Type of work ---

MEGAN

1:48 Yeah. Yeah, 100 percent commercial. That's just kinda like a term loosely for what they're doing. Yeah.

BROOKE

1:55 No, that's what I figured, but just wanted to clarify if there was any like residential aspect in the business, but that makes sense. I'll say that I don't hear a lot of in person prospecting from a lot of the companies that I talked to. So that's really neat. Is that you've always done or?

--- Type of work ends ---

2:16 That is something that we actually really push our people to do. We want them to be out physically, meeting people in person, less of the phone calls, emails and all that, because we find we have a much higher success rate with that and it helps with the relationship aspect.

BROOKE

2:34 Yeah, absolutely. Super cool. Well, aside from leading the account managers, what else are you covering?

MEGAN

^{2:43} So I also sales aside, work very closely with the owner as well. I do a bit of the marketing for the company and, you know, some other miscellaneous things. But I work very closely also with the head of the service department who's Terry. He's the VP of the department. So in the past, you know, I've helped with dispatching and things of that nature. So we kind of have people filling wherever it's needed around here. Everybody wears multiple hats, which is kinda cool.

BROOKE

3:18 Well, yeah. And you said his name was Terry leading the service department?

--- Type of work ---

BROOKE

3:24 Yes. Okay, cool. And then in terms of your service breakdown, it looks like you guys are about a 60 40, like 60 reactive, 40 PM. Are you guys actively looking to grow out that preventative maintenance side? I think Sean mentioned something along those lines.

MEGAN

3:44 Yes, absolutely. We're honestly looking to grow in every aspect. On the service side. That PMS is definitely one where, you know, the more PMS you have, obviously, the more service calls will be generated and in special projects. So we are actively trying to grow in that area, I guess.

BROOKE

4:03 Okay, perfect. Do you guys have like specific metrics that you're trying to hit for the service side? Whether it's you know, revenue based or volume based? Have you guys talked through that yet?

--- Type of work ends ---

MEGAN

4:14 Do, and it's kind of specific to each individual salesperson, but I would say the department as a whole, I think our goal this year is to do like 8,000,000 roughly.

4:25 Okay, cool. I'm just taking some notes here. So I apologize for my typing, right?

BROOKE

4:41 And what sort of the game plan here for hitting that 8,000,000? Like what goes into that for you guys?

MEGAN

4:49 So that's where we've got a general service division that's kind, Terry who I had mentioned earlier, the head of the department, he handles all of that. So that's basically any customers who call in on their own just if they find us from Google or senior Van or whatever the case may be. And then the sales side. So myself and then the sales account managers that I mentioned previously, that would be, you know, where they come in and go out, knock on doors, bring in new customers. And then they're also responsible for managing those accounts as well. So we don't really break it out as of now.

--- ST app contracts and pricing ---

MEGAN

5:29 This is the dollar amount we want you to bring in PMS versus, you know, service calls and projects. It's kinda just like an annual goal in total.

BROOKE

5:39 Okay. And is that changing? So each salesperson is gonna have like a hey for four PM. We want you individually to bring in this much. This here. Is that the change that to?

--- Purchase decision ---

MEGAN

5:49 That is something that we are looking at?

BROOKE

5:51 Yes. Okay. Gotcha. And then I know that a couple of members of your team, I'm not sure if you were involved, have looked at service trade before. I think back in 2020 was that something you were involved in?

MEGAN

6:05 It's not Terry was involved in that and he actually had recommended that I reach out to you guys. He will be involved in the demo again. But basically, I'm just kinda heading off these initial calls for answering these questions. But he did remember obviously the demo and liked it. And so I think now we're in a little bit better of a situation to make this a reality. We never did make a change using the same software but hoping that this round we'll be able.

6:39 Cool. Yeah, yeah. Because I was curious, I was looking at some of the notes and it was just right before I started working at service rate. I've been here about two years now and I saw that the main sort of hold up was that the, your owners weren't quite ready to jump ship.

--- Accounting integrations ---

BROOKE

6:54 And so I was curious what's changed, but it sounds like... it sounds like that you guys might be sort of more in the head space to move forward with something. Should it be a good fit for you? Is that right?

MEGAN

7:07 Hopefully, yes, if we still similar situation, people who work every day within the service department are striving to get a new software system, others upper management, you know, more along the financial aspect are trying to do whatever possible to stick with the current system that we have.

--- Accounting integrations ends ---

MEGAN

7:31 There are featured. However I have spoken directly with the owner on this and he did say now we are in a better financial situation to have this be a reality. And so I do think we have a much better chance this round to make this happen than last time. But I will just tell you basically we are doing multiple demos and the features that we're seeing in the multiple demos that we're doing. We are going to go back to computers to see if these are things that they can also accomplish for us. I don't think a lot of them are. And if they are, they're not as user friendly as what we have seen so far but that's kind of.

BROOKE

8:11 Where we're at? Yeah... couple of questions. First one is aside from Terry and yourself, who do you suspect would be one at the meeting tomorrow and involved in this in the process in general?

MEGAN

8:24 Christina Morris, she is our accounting manager. She'll definitely be a big factor in this... from the accounting standpoint. And then Amy under the VP of operations here, she will be involved. And then Morris is the owner of the company. So if we get far enough to where we really were really considering those people.

BROOKE

8:49 And it was Nick Morris.

MEGAN

BROOKE

8:53 Mike Morris tired at that, that's... okay. And are the three of them attending the meeting tomorrow?

--- Accounting integrations ---

MEGAN

9:00 Leave Terry and Christina are maybe Mike not be as of now.

BROOKE

9:10 Okay. And then is Amy coming?

MEGAN

9:13 Possibly I don't know.

BROOKE

9:13 Okay, perfect. And then you said something else that stood out to me. So talking about replacing Computerease and FieldEase. So to clarify, are you guys looking to replace FieldEase? And so a service platform and then keep Computerease or replace them both?

MEGAN

9:41 We have a service and Construction division here and computers works well for Construction. And so what we're thinking is to keep computers for Construction and then maybe make a change for service. That being said FieldEase is more of what the technicians use, but the office staff uses computers. So for service, we're looking to change both if that makes sense?

BROOKE

^{10:11} Okay. Gotcha. And the reason I bring it up is because there is an option to integrate ServiceTrade with Computerease. We do have it's not native but it is something that's built that more than a few of our customers use it's. Definitely, it's not.

MEGAN

10:26 Then we would love to learn more about because in the other demos we've done, we have not met another company that does communicate with Computerease.

--- Accounting integrations ends ---

MEGAN

And honestly, I think that's going to be a huge factor. I know that it's going to be a huge factor. And so just because we would still be in it for another portion of our company, right? And so if we do have that ability, that's definitely something we'll want to really learn more about. And that will really help the process.

BROOKE

^{10:55} Yeah, I suspect that tomorrow we'll keep it more focused on service trade, core functionality. And you know, how we differ from our competition. And then if you guys give me the thumbs up on what I show you tomorrow, we would have a follow up meeting perhaps with my accounting team to talk through what's possible there?

--- Accounting integrations ---

MEGAN

Okay. Yep. But is there any way do you think you would be able to maybe have like some basic information on the accounting piece or? Okay, just because I know we've done other demos and they've kind of felt like, well, why aren't, we addressing accounting right now? And so if we're able to... at least include a little bit of that to help them feel comfortable enough to go to that next step, I think that would be.

--- Accounting integrations ends ---

BROOKE

^{11:45} Yeah, no, I can definitely come with a preview. And then depending on her name is Tania at our company, she's our director of partnerships and she works closely with Computerease.

--- Purchase decision ---

BROOKE

^{11:55} And depending on her availability, I can even ask her to pop in for, you know, 10 minutes of the meeting to give a rundown.

MEGAN

12:01 That would be great.

BROOKE

12:05 Now, in terms of FieldEase for the technicians... how do they feel about... the resources they're given currently? Have they communicated that to you?

MEGAN

You know... not a lot. I do think that from what we've seen at other demos, there are features that we do not have that would be very beneficial for us to have. But as far as overall ease of it and everything, I haven't heard a ton of complaints.

--- Paper process ---

MEGAN

12:37 Honestly, I think a big portion of why we're searching for something different is mostly is related, but it does with the text in the field because is, you know, for

example, our work orders currently are not set up to ask prompts that force the technicians to fill in certain areas, closing out the work order.
Assets
MEGAN
12:59 So what happens is they'll put in the notes, maybe not thinking about refrigerant that they put in or something. And then they close the work order out. And then we're left with a bunch of open work orders trying to track down information that's needed before we can fill it out. If that makes sense. So office thing that does relate to the field and how they're filling information.
Assets ends
BROOKE
Okay. So it sounds like parts tracking, needing to know what needs to happen next, especially on things that need to stay open is things that we should focus on tomorrow.
MEGAN
Yeah. And then another thing we saw in a demo that really stood out to me was the ability to, for the, to take a picture of the main plate and then it automatically input the data information into the software system. Okay? I don't know if that's something you guys can do, but that was a pretty big deal for us.
Assets
BROOKE
13:51 So taking a picture of what?
MEGAN
13:53 Name play on the unit and then it automatically like input that into the system for us. So the having to physically type in each model number for each piece of equipment they're working on.
BROOKE
14:06 Okay. What company showed you?

MEGAN

BROOKE

--- Assets ends ---

14:10 Not with BuildOps?

14:11 Okay.

BROOKE

That is something that is available. I just have to see if I have it's good that we're talking today because now I have until tomorrow to there's like different demo settings that we'll typically have set up. And I know that one's not inherited but I'll have that set up tomorrow.

--- Assets ---

MEGAN

14:36 Okay, great.

BROOKE

^{14:37} So it's basically they took the picture of like not the usually the term used as bar code but name plate and then it populated the asset information with like make a number. Is that what you're talking about? Yes?

MEGAN

^{14:52} Yeah. A big piece of that, that's very important is so then every time the tech is going out to that property working on that particular, whatever unit, they snap the photo and then automatically links everything to that or to you or whatever piece of equipment. So then there's a full history on everything specifically pertaining to that.

--- Assets ends ---

BROOKE

^{15:11} Okay. Cool. Gotcha. And then Sean said that the other things that you're looking at is he mentioned that it's difficult to generate reports for customers. Could you shed some more light on what he might mean by that?

MEGAN

^{15:30} I'm not sure what he means maybe. So I'm trying to think about what I could have meant that he meant that he interpreted that way?

--- Assets ---

MEGAN

15:43 Possibly like warranty things like that or maybe even this. So basically, right now, we don't have a good search engine. Okay? So it's our customer is wanting a report or information on a particular piece of equipment. All we can do is go read through every single note that has been taken on every single.

--- Recurring maintenance ---

^{16:07} We cannot search or three or whatever at this particular property. We just literally have to go read through every and so, but that may be what he was talking about. Another thing that while we're talking about it, other demos have shown us where like preventative maintenance, generate a report showing the overall profitability on the preventative maintenance.

--- Purchase decision ---

MEGAN

^{16:33} Whereas right now we don't have a good way of tracking that. And so that's another, any kind of report like that would be very beneficial for us to have.

BROOKE

^{16:43} Okay. Yeah. That makes sense. There's a ton of reporting options in service trade. So whenever someone broadly throws out the word reporting, I'm like there's 20 different things I could show you, but that point me in the right direction for tomorrow. Great. So, you mentioned that you had done a demo with BuildOps. What else are you guys looking at?

MEGAN

^{17:07} We looked at service tighten, which we were impressed with but not impressed with the price. And we look at... one other one. I forget what it was even called, but we were not even considering that one. So really right now, BuildOps is our first choice.

BROOKE

17:29 Okay. And what, where are they at? On price BuildOps?

--- *Pricing* ---

MEGAN

17:36 We have to go back in my notes. I think they were in the neighborhood of 100 to 125. I think I don't have in front per user per month.

BROOKE

17:52 Okay. But.

MEGAN

^{17:54} We did meet with a different one where the office user price was different than the field user price, which was like... so the field user price was like 25 dollars a month in the office was like 150.

BROOKE

18:08 Okay. And which one was that? Is that one you're still considering?

MEGAN

18:13 We're not ruling it out yet. But so, yeah, it's one. We're still considering.

BROOKE

18:20 Okay. Which one was that?

MEGAN

18:25 Simpro?

BROOKE

18:27 Okay. And then for the Bill ups for the 101 25 per user is, do they charge office and tech or?

MEGAN

They just set per user per month. So yeah, I think whoever is, because so like we have two dispatchers for example. And so I think that would count as two users. And then all the text obviously really whoever the way I understood it is whoever would be needing to access it, which just so you are aware that price was better than service tighten. But it was still one we were talking about. Well, maybe we can negotiate with them because we.

--- Pricing ends ---

BROOKE

19:10 That makes sense. So service raise pricing is right on our website, but the way that we break it down and we could definitely talk about this more detail tomorrow. Once I've sort of assessed what I would recommend for you all to start with, but we only charge per mobile technician using service trade in the field.

--- Paper process ---

BROOKE

^{19:29} Your office staff is gonna be free to use as many accounts as you need on the office end. It's a large and we do that because from our outlook, it's the technicians are the one driving your revenue.

MEGAN

19:43 **Right?**

BROOKE

19:44 You know, benefiting for the most part from the tools that ServiceTrade offers not to say the office isn't gonna benefit as well. I'm sure you'll be excited about what you see tomorrow, but that's sort of our outlook on.

MEGAN

19:54 I... was gonna try and look up really quick your pricing or do you know off the top of your head that you could tell me?

BROOKE

^{20:02} Yep. So for companies your size, you guys are likely going to be on our premium or enterprise plan and that's about, I think premium is one 39 per tech per month. And then enterprises, I believe 159.

MEGAN

^{20:21} So I did just pull it up really quick. I see one 39 for premium. That enterprise is 189. Are you guys, are you guys able to negotiate that pricing at all?

BROOKE

^{20:35} Within within reason? There is definitely room for negotiation. I think it definitely what helps is what helps from me getting it approved from management is a clear cut timeline and goal of when to make a decision and go live. That definitely would help. So it's stuff that we can talk about tomorrow.

--- Accounting integrations ---

MEGAN

^{20:56} Okay. And then really quick, I do have a quick question for you on the whole computer service trade integration. So, do you guys have any integration fees? And also would you guys handle importing all of our history, everything from Computerease into your software system for?

BROOKE

^{21:22} So that's stuff that I would want to cover? Yes, there are fees for integrating with Computerease. There's like the setup fee and that I believe there might be an annual recurring to maintain the integration. But in terms of setting it up, yes, my team does that and they'll pull over the information from Computerease to service trade. That's a big part of our responsibility for onboarding new customers is handling the data import side.

--- Accounting integrations ends ---

MEGAN

^{21:49} Okay. And then, do you know, like maybe sorry, if you can maybe just make note to go into that a little bit more in depth tomorrow because that's another that's a big reason why we've had pushed back in the past not necessarily being ready to jump to a system is because of the concern of the amount of time and effort and possible human error that would happen from us having to do that internally.

Yeah. I'm checking right now to see if Tonia is open tomorrow. Okay. It says that she says that she's in Houston, but it doesn't say that she's necessarily not working. So I'll chat with her after this to see if she can maybe join us.

MEGAN

22:38 And if not, we could always look at maybe you can do it a different date.

--- Purchase decision ---

MEGAN

^{22:45} We definitely want to see what you're able to present to us. But just in my experience, from the other demos, I've done the things that we're talking about now are like the very important things the big decision makers are really wanting to know. So if not, then we can definitely look at what you have to offer tomorrow and set up another meeting later on. But if we were able to do both, that would be great.

BROOKE

^{23:09} Okay, perfect. I will check with her right after this. Okay. So since we've talked a little bit about pricing, do you guys have like a straight budget that you're trying to stay in between just so I can have a good idea of where we're at.

MEGAN

^{23:23} Don't have a strict budget. Unfortunately... yeah, I wish I had something to give you there, but I don't...

BROOKE

23:31 Okay. Do you know what's gonna determine that number?

MEGAN

^{23:39} No, I think honestly, it's gonna boil down to, you know, when we do meet with the owner and, you know, his questions of, okay, where are we gonna make up these costs and how can we work that in? So we're not losing money basically by changing to a more expensive platform, but I do think that the price is a major factor obviously. But if we are able to switch to a different software system at ease where it's not gonna be a headache for everybody here. And we know we feel comfortable that the two systems do communicate that's gonna be huge, that's probably gonna outweigh everything else to be honest with you.

--- Implementation and ongoing support ---

BROOKE

^{24:22} You're talking about the initial implementation and change over. Yes. Yeah. Well, if it's helpful, and if it, if we end up getting to that point in your evaluation, I'm happy to have you chat with a few or at least the leader of our implementation team to kind of walk you through what the process looks like, set the right expectation and sort of, you know, what we're responsible for versus what you're responsible for, so

that you guys know exactly what you're diving into that's something I'm happy to do should we get to that point?

--- Invoicing ---

MEGAN

^{24:55} That sounds great. And then really quick. Another big piece is the accounting version. So does ServiceTrade have an accounting system I guess built into it?

BROOKE

^{25:08} The short answer is no, where service trade starts and stops at accounting is you can invoice through service elect payment. But beyond that, you would essentially invoicing service trade if you want to. I'll show you tomorrow why I recommend doing so. And then your customers can pay through service trade and then you guys can push those payment details over to your accounting system.

MEGAN

^{25:32} Which is Computerease. So if the two communicate together, that should be a pretty easy task.

BROOKE

25:39 Yep. Yeah.

--- Accounting integrations ---

BROOKE

^{25:41} If you choose to integrate the systems, not everyone does, but if you choose to integrate the systems, it's you know, a button push of saying, you know, send over to Computerease. And you can do that in bulk. Of course, companies that choose not to integrate from the get go are really just keying in manually the details into Computerease or whatever system they're using.

--- Accounting integrations ends ---

MEGAN

^{26:02} Okay, which we are volume and everything is way too much to do that I believe. So. Okay. That sounds great. I had one other question I was gonna ask you, but it just escaped me, so.

BROOKE

^{26:14} I think of it cool. Well, in terms of what to go through tomorrow, I've got a pretty good idea.

--- Customer engagement ---

BROOKE

^{26:24} I think that it's it makes the most sense to focus primarily on the office. So we look at things like, you know, the service dashboard and how your customers are set up and what information is stored for them and how to look at their equipment. One thing that I'm curious if it's interesting to you is service trade has a customer portal. Is that something you guys have now or your customers have expressed interest in?

MEGAN

^{26:49} Can you elaborate a little bit more on what you mean? When you say customer portal?

BROOKE

^{26:55} Yep. So it's a portal for your customers to log into where they can log in and see they can see their past previous current jobs that you're doing for them, they can look at their equipment. So say, the rooftop unit breaks down and before they call you, they say, you know, hey, I thought that they came and serve this services last month, they can sort of check their thought by logging into the portal and seeing what was done before and seeing if the equipment has had issues before. They can also pay invoices, approved quotes and request service through the portal. So something like that.

--- Customer engagement ends ---

MEGAN

^{27:29} Do you think that's something we would like to hear more about? That's not something we currently do but that would be very good for us in the means of taking that off of our like how many do all the research? And I work for the customer when they can kinda do it themselves. So something I can't say for sure would use, but we would like to learn more about.

BROOKE

^{27:52} Yeah, I can lightly show that tomorrow in that case, and then we will go through the tech view. I figured we could do like a mock PM job together. I'll keep it pretty high level on that end. Okay? So you can see what your guys in the field would be working with and how it differs from what they're currently using?

--- Purchase decision ---

MEGAN

28:11 It sounds good. Yeah.

BROOKE

^{28:14} Anything else aside from, you know, the office functionality type functionality, I'm gonna see if Tanya can join us tomorrow to cover some of the accounting piece, but anything else you want me to be mindful of or be sure to cover tomorrow?

^{28:31} I think that just about does it will probably if it's okay with you ask questions as they come up?

--- Purchase decision ends ---

MEGAN

Yeah, we'll do that. And then it was a question that has come up in the previous demos we've done is what other companies similar to Frontier Mechanical currently use your software system? Do you know off the top of your head about companies who are locally in Colorado or is that something you could research and let us to tomorrow?

BROOKE

^{29:00} Yes, that's something I would want to run a report to make sure I'm not remembering different, you know, people's in different areas, but we do have customers in Colorado and let me make a note of that right now to see if I can bring a few names.

MEGAN

^{29:14} Yeah, that would be commercial hvac that's definitely something other people here have been curious about when we're looking at these other.

BROOKE

Yeah. Yeah. Quick background on service trade and we'll go through this more tomorrow, of course, but we're about 11 years old at this point. For the past 11 years, we've been exclusively focused on commercial service. We do not work with residential contractors and we go out. I would say about close to 1,100 customers that at this point, you know, give or take a few, but... that's go ahead.

MEGAN

29:54 Are you nationwide?

BROOKE

29:55 Yep.

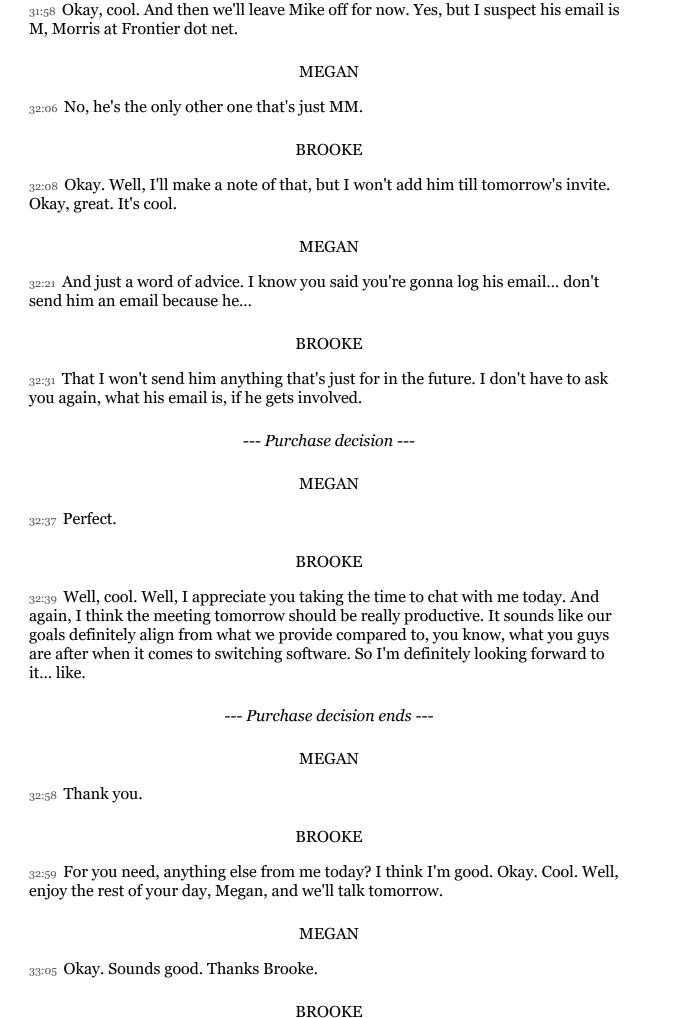
MEGAN

29:58 Okay, right. Sounds good.

BROOKE

30:02 Cool. Well, I think tomorrow should be a really productive meeting. And then... if you don't mind adding, I don't know if you have already, let me see. I was gonna say if you don't mind adding who will officially be attending? If you're able to, just to the invite because right now I just have you on there.

30:24 So, let me just really around here because I was trying to figure out, I thought I had, I was trying to figure out I did. Okay. So this is tomorrow at 11. Yep. Let's see. **MEGAN** 30:43 Yes, I can just by forwarding it, you mean to the other people? **BROOKE** 30:48 Yeah, or I. **MEGAN** 30:50 That'll let me add attendees on here. BROOKE 30:54 Maybe that maybe I have to do that? **MEGAN** 30:56 You, would you want me to give you their email addresses or I can just forward it to them? What would you prefer? **BROOKE** 31:03 Yeah. If you have their emails, I think that would be helpful. **MEGAN** 31:07 Okay. Let me know when you're ready. **BROOKE** 31:09 Okay. Let me go. Yep. I'm ready. **MEGAN** 31:13 I'll give you Terry, Christina, and Amy. So Terry is turban, Durbin at Frontier me, MECH. Okay. **BROOKE** 31:28 Net... dot net. Okay. So T Durban Durbin retire dot net. Okay? **MEGAN** 31:37 So, everybody's going to be at Frontier net and person is your last name? So Christina is Christina or so C Morris... gotcha. And Amy is a, I like she's just as a, at Frontier me. **BROOKE**



33:07 Bye.

The End