



# Call with Intermountain Temperature Solutions LLC - Jaramie Dowdle

Gus Giles

Recorded on 11/4/21 via SalesLoft, 22 min.

## Participants

### **SERVICE**TRADE

Gus Giles

*SDR*

### **OTHER**

Jaramie Dowdle

# Topics

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# Transcript

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--- Call Setup ---

JARAMIE

0:00 Hi, I'm Victor solution that's pretty.

GUS

0:03 Hey, Sandy. How's it going?

JARAMIE

0:05 Good. How are you?

GUS

0:06 Excellent. I'm doing well. It's just Gus from service trade, just example he was in the office.

JARAMIE

0:14 Yeah. Hey, is not, is there something I can help you with Gus or?

GUS

0:19 Well, we... we...

JARAMIE

0:20 No, that's right. Sorry. No, I'm... I'm with you that you were gonna talk to him about service trade. I was like, but we... but we are using service trade. So, is there something I can help you? Yeah. Hey, but we're not... we're not with their yet. Let me, yeah, let me see where he's at, and if you send a position where you can talk with you, can you hang on one second? Okay. Alright, hold on.

GUS

0:25 Yeah, yeah, totally.

GUS

0:31 Yeah.

GUS

0:37 Okay, good. Yeah, certainly.

JARAMIE

0:48 We appreciate your call and we'll do our best to keep you waiting.

JARAMIE

1:35 We appreciate your call and we'll do our best not to keep you waiting long.

JARAMIE

1:49 Gus.

GUS

1:50 Yeah.

JARAMIE

1:51 Can you email me all your information so he can reach back out to you? He said he... he would like to talk with you, but he's still based on his other line trying to get their.

GUS

1:56 Yeah. What?

JARAMIE

2:05 Day go in and done. And, you know, stuff like that?

GUS

2:09 I don't remember if I asked you last time because we're doing these just 30 minute Zoom demonstrations. So, if he was interested, you know, you could just schedule something in the calendar or a week or two from now and.

JARAMIE

2:23 Well, if you want to send that so that he can, so he can schedule that. I'm not, I terrible up. I schedule it for him. I'm gonna pick a day where he's not going to be in town and it's going to be like, why did you do so? But he does. Yeah. And the best email to him, not everything to him would be Jeremy J a R a MIE.

GUS

2:34 Yeah. Okay. Cool. Yeah. What's a good?

--- Call Setup ends ---

JARAMIE

2:47 At it S refrigeration? Dotcom?

GUS

2:51 Ration, dot, calm. Okay. And I'll put some available dates in there for them to, just because it's you know, getting closer to the holiday season. So, a lot of these time slots are just kind of filling up. So, yeah, I'll put some available dates in there.

JARAMIE

3:04 Yeah. And did you... did you find out if... if our technicians can make their own service calls after hours yet? I think that was the only thing that was holding us back from... from going with you guys because like I said, I... I used you guys for a while. I'm with a company that I worked for, am I, and I love everything about your... your guys, his concept except for the technician has been able to make a call after hours. So, did you? So sorry, let me ask that question and then keep talking so you can after?

GUS

3:14 Yes.

GUS

3:18 Yes.

GUS

3:36 Yeah, no, you're okay. Certainly. Yeah. The software it gives them access as long as you do is as long as you at the, in the office given them permission to access it.

JARAMIE

3:48 Wow. So, so every technician can have access to make a... make a service call if there after hours?

GUS

3:49 Yes. Yeah.

GUS

3:55 Yes, that's correct. Yep.

JARAMIE

3:57 You see that's? Awesome because I think that was the only thing at the time that was... that was.

JARAMIE

4:05 That we needed like we... we don't have someone here after five o'clock to, you know, so far, I technician was on call. He needed to be able to make a service call to go. Do, you know, did go do something because there wasn't someone here to make it for him and drop it to him. So.

GUS

4:06 Yeah.

GUS

4:19 Yeah, certainly. That is something that we've added to the platform. So, and you guys will enable to track that in real time, also see where they're at. And, you know, stuff like that?

JARAMIE

4:30 Yeah, I like that. That's not a problem for us. We don't really have to track them in real time. We just, we need, we, we're... we're very... very simple where, you know, there's... there's what seven tex?

JARAMIE

4:46 We're we're all family. So, so we're not kind of worried about that, but our big thing is... is I.

JARAMIE

4:55 I need to send it. I need to be able to send an invoice off with pictures. So, so if I am going to Bill from my service trade, I need to be able to say here's this, and then here's all the pictures... that they took because we... we have our clients that don't even really care about the description of what the technician? Did they want to see the pictures? Because they're they all can understand by looking at the pictures, but it was it done. Did it, was he not this not? So we need to be able to send off at a billing invoice and with pictures attached.

GUS

4:59 Yep.

GUS

5:13 Yeah.

GUS

5:26 Right. Because that really, you know, that covers hotel and it provides that evidence and proof also. Did you say that? Did you say last time that you guys were using HouseCall pro? Okay... okay. Alright. Excellent.

JARAMIE

5:33 Huh.

JARAMIE

5:37 We are.

GUS

5:43 Okay.

JARAMIE

5:44 Okay. And that's the feature that we like about it is that we can, because we email everything off. I very... very... very seldom now an invoice out. So, I have during the day, like when these guys are done and let me know. I'm done, they're done. I check over their invoice and make sure their pictures of their, the parts to their... their, do, you know, their purchase orders are closed, you know, stuff like that. And then I, I'm in any given day, we'll get an invoice out probably 15 minutes after they're done. And so, so.

GUS

5:55 Certainly.

GUS

6:14 Excellent. And... and.

GUS

6:17 No, go ahead. I'm sorry?

JARAMIE

6:19 No, no, no. What were you gonna say?

GUS

6:20 We're excited.

GUS

6:24 You guys do a fair amount of preventative maintenance also correct?

JARAMIE

6:28 We do, we do and... and our parts like, so we do a lot of maintenance says, which I know we, there, there is a maintenance process and... and how it, you know, and... and service trade that I can make my own maintenance calls and... and track my maintenance calls. And I... and I know, I mean, there's a lot that I know that I love like an, and we need.

GUS

6:42 Yep.

JARAMIE

6:52 Like like house calls is great, but we cannot track our parts calls very easily. We just have to and kinda, and schedule and pray that we keep remembering, you know, to... to figure out why is this unscheduled? Yeah, it does because the order parts and he has to go back and so, so.

GUS

6:56 Okay.

JARAMIE

7:09 Jeremy being out on the build, he, they are... are the, you know, the bosses work. They work every day they dispatched to the guys, they need a process that, you know, while they're out and about that they can pull up something and they can see that there's part sitting there. They can see like the maintenance. They can... they can see all these and be like, look, you know, you're not done for the day. You got parts that you gotta go back and get this done. And right now, they can't really see that... option unless I... I email it to them all the time. So, so.

GUS

7:18 Yeah.

GUS

7:47 Lot of work you're doing?

JARAMIE

7:49 Yeah. So they, so there's... there's a lot that, so with our thing. So the selling points really... really be, it would be when you... when you get to talk to them and we're waiting on with... with Jeremy and there's... there's Jeremy... Jeremy and Pat. But when... when you get to talk to them about your selling points, yeah, to Jeremy is one spelled JOR a MIE, and then the other is the original Jeremy spelling, but... they're... they're selling points are going to be more or less. Can we have a technician make a call after hours? Can we invoice with pictures? And what can my dispatcher see well on the build to be able to send calls to the technicians?

GUS

8:06 Hi, Jaramie?

GUS

8:14 Okay.

GUS

8:33 Certainly. Okay. I'm also curious.

JARAMIE

8:35 So those, huh?

GUS

8:38 I was also curious what accounting software are you guys, you know, using for invoices and balance sheets and stuff like that? Is that tied into house called pro or what do you get?



JARAMIE

8:48 So, so house called, yeah, we do, or how the house calls goes to our Quickbooks. So, so we just have the house calls, we, the house calls, they send out the invoices, and then the invoices sync with Quickbooks. And then when they pay... they're... they're you know, when they pay us, I go to the invoice in HouseCall, type in the... the check number, and then hit paid, and then it sinks to our Quickbooks.

GUS

9:11 Okay. I see. Okay. So just throwing this out there also that we do have an open integration with Quickbooks. So you'd be able to hold on the Quickbooks for your accounting to.

JARAMIE

9:22 That would be awesome.

GUS

9:23 Yeah, I'm... I'm...

JARAMIE

9:25 Just don't just don't try to pull all of our information from Quickbooks into the new software because we... we went to that. We actually tried BuildOps. I don't know if you've heard of that and, but... but I, we, it... it just, we tried it for a couple of days and... and our... our problem is this, they can see the dispatch board where they were out on. They know we're out in the field. They can see the dispatch board to figure out what to do with the guys. So, the guys are having to call me and be like what's on the board, what's on the board? And, you know, I'm... yeah. Yeah. And... and then the next problem was, is as that I could not invoice with pictures and they would, they, I could invoice out like just an invoice. And then I could send a separate invoice with pictures. I don't know it was a process that I can't do that. I can't send an invoice from my, it breaks the... the emails. You know, I want to be able to look in there. And from... from start to finish the, you know, who made the call? Twos, you know, did we... did we email the call out? Has anybody opened that call? You know, and it's all right there and that's in the screen? Do you know what I mean on... on that customer? And so, and... and with emailing from my personal email to send an invoice kinda breaks that to where the girl who does the collections and stuff like that, it will be an invoice and she'll be like, well, why hasn't anybody paid this? So go, she'll see that it's just been invoiced and that's it. So then she's got to find out who sent it, who can look back through their emails to see if it's there. You know, we just want everything to be right there from start to finish. And that's kind of it, but I know that you can do that with service trade. So that's you know?

GUS

9:34 Yeah. Yeah.

GUS

9:57 Perfect. We... we don't wanna do that to you.

GUS

10:02 Yeah.

GUS

10:12 Okay.

GUS

10:27 Yeah.

GUS

10:32 Well...

GUS

10:42 Yeah.

GUS

11:01 Yeah.

GUS

11:17 Yeah, certainly. I'm... I'm just curious. I'm pretty excited to be able to show you guys some of this stuff that you're you know, wanting to do with software. Do you happen to have, you know, a picture of Jaramie, his calendar for the next coming weeks just to schedule something in and we can reschedule that's. Not a problem at all. But I definitely want to get lot before these things kinda fill up.

JARAMIE

11:44 Fill up yet. Did you send it to him? Did you send them something to... to... to do it so you can look over? I can get with them until maybe it's look over it, get a slack, you know, in there and going.

GUS

11:54 Okay. Okay. Yeah, no, I went.

JARAMIE

11:55 Because I'm not quite sure right at this moment. If he's going to be in town, he's been, he's... he's been doing a bunch of stuff in and out of town over the last couple of weeks. So it's hard to pinpoint if he's going to be here if he's not going to be here, you know? And so that's what he's doing now is trying to figure out his... his month to, you know, of what days is going on, what days is going to be back? But... but, yeah, it's probably easier if you send it out to him and then you are more than welcome to CC billing the billing. It... it has refrigeration also. So that way.

GUS

12:03 Yeah.

GUS

12:18 Okay. Okay. Great.

GUS

12:29 And billing ics, refrigeration, dotcom. Okay?

JARAMIE

12:33 Huh. Yep. You can... you can see... see me and that way if I can get with them, I can schedule it real quick also in there. But yeah, if you, but, yeah, if you're... you're selling points when... when you do schedule that with these guys is like I said, it's gonna be the technician, be unable to make a call after hours, them being able to see, I'm out on the build what needs to be done. And then you, we obviously have the parts tabs, the maintenance tabs, you know, stuff like that where we can separate everything and... and see what's out there and set up an opt in one lump sum. So that would be assigned point but you're but yeah, you're like I said, your... your biggest selling point if you want us to get this is those two things, what can the dispatcher see on the build and the technician making their own costs? Other than that, you guys pretty much have it in the back and had it... had it before and tell the, he couldn't make a call out on the build. So.

GUS

12:41 Okay, beautiful.

GUS

12:57 Yeah.

GUS

13:09 Okay.

GUS

13:27 Yeah. Okay.

GUS

13:32 I see. Okay, view.

GUS

13:37 Well, yeah, I'll send out an availability and CC you and I wanted to make sure I spelled your name correctly. Is it sending like CI NDY?

JARAMIE

13:47 Yeah. See. INDY. Yep.

GUS

13:49 Perfect. Excellent. Okay.

GUS

13:52 Is there a way, just one last question about, you know, HouseCall pro? Is there a way that your text would find out about new jobs after hours? Is that already something that's established?

JARAMIE

14:02 So, after hours, our phones go to answer phone. So, so answer, like, so we have a thing called answer phone and I saw somebody calls or emails, they get the emails and that is called a technician and say, hey, we have a call for you here. It is. I'm gonna technician just kinda goes and finds that. Could that customer and just, and then just makes the call and goes out on it, you know? And then the next morning, they... they, you know, thank you. I guess they know, I know that they've gone that night. They, we have a way for them to say, please invoice this call or, you know, just stuff like go put it in the saint Thomas. And... so, so they let us know like, I know that it's there no big deal, but that's how they get their after hours calls, but they just need to be able to put it into the system so that the next morning, I can look over it, fill it out and get it out the door.

GUS

14:25 Okay.

GUS

15:03 Okay. Is that in from the office or that's while they're out in the field?

JARAMIE

15:08 What do you, what do you mean?

GUS

15:10 Like your technicians, you know, for the after our jobs, do they have to come back to the office at that point or? Okay?

JARAMIE

15:15 No, no, they never come back to the office. There's... there's never anything that they, the only time they ever come back is, should they get parts sent here? You know, I let them know that their parts are here. They come here other than that, they, if they, I, they make a P, a purchase order for parts, I usually add the parts on there or are they up or they take a picture and upload their receipts? And then I make sure that those receipts are on there, you know, everything's done with the technicians out in the field, the technicians do everything. And then by the time they're done, I look at and I look it over, let them know if I need more, if I need less or, you know, you don't have, you mean, then I build it and then I fill it out but they... they build their own tickets, 90 percent of the time after hours. So, if he, if so say they get a call, they... they get... they get the call, they make the call. They put in their, you know, walking cooler down Frank called, you know, so they make that they go to the

location they do, then, you know, they go, they fix it. They do their description, what they did, that they put their parts in there, that they... that they used. And then they hit complete. And then I go through and make sure that they're you know, then I do that. What I, what billing usually does, you can make sure you're part prices are on there majority, you know, you're off our peas on there like that they.

GUS

15:58 Yeah.

GUS

16:43 Right.

JARAMIE

16:47 You know, during that, from eight to five, I create the invoice, but after by, they have to create their own invoices.

GUS

16:51 Yeah.

GUS

16:54 I see. Okay... okay.

JARAMIE

16:55 And they also will, will create their own customers. If it's a brand new customer... they all have the ability to create the customer. Sometimes I have to fix it. Sometimes I, you know, I don't just depends but they... they have that ability to create their own customer if it's new. And then from there make their invoice to, you know?

GUS

17:11 Why?

GUS

17:21 Okay.

JARAMIE

17:22 To go out on the call?

GUS

17:25 Okay. Alright. I really appreciate you taking the.

JARAMIE

17:28 And they actually used to do their own billing.

--- Wrap-up ---

GUS

17:31 Really? Okay.

JARAMIE

17:32 Until I came along, yeah, they actually used to be able to just look it over and then send it off. Right on when they were done while they were on site, they would send up the Bill.

GUS

17:41 I see. Okay... okay, Cindy, I appreciate you taking the time to unpack this stuff a little bit for me. This way, the territory manager, will, you know, I'll fill them in on all this stuff and it'll be a really productive meeting. Yeah, certainly. So, I'll... I'll go ahead and send something over to you and Jaramie and includes availabilities and, yeah, then, you know, just let me know when you get it and I look forward to speaking to you.

JARAMIE

17:47 Yeah.

JARAMIE

17:56 Right.

JARAMIE

18:02 Okay.

JARAMIE

18:13 Yeah, that'll be great. I will... I will definitely look for it definitely.

JARAMIE

18:19 Try to get it so that you can, we can get this done and over so we can get a system going that's going to be more productive. And I mean, because like I said, it's it house calls is great.

--- Wrap-up ends ---

JARAMIE

18:27 It does what it needs to do, but we need to be able to have the parts, you know, like things just not all lumped, summed, so we need to separate our maintenance as we need to separate our parts. You know, we need to reset Bright. You know... you know, what I'm talking about like how you have to separate all. Yeah. And then just the, you know, the technicians after hours that's it. But other, I mean, it's really that simple and I know that you guys are actually really that simple. I know that... that I'm not to sound bad, but you guys are your, that simple. It's that easy. It's that

simple. It's right right there in front of me. And like I... like I said, I used it, I used it before for the other company that I worked for. So it's easy to maneuver through.

GUS

18:35 Yeah.

GUS

18:42 Yeah, yeah.

GUS

18:46 Yeah.

GUS

18:51 Yeah, certainly.

GUS

19:02 Yeah.

GUS

19:08 Right. Sometimes, you know, right? Sometimes you don't need all the bells and whistles, and that's what we do is tailor the software for you guys. I'm... I'm just one shot in the dark. Is Jeremy still on the phone?

JARAMIE

19:18 Yep.

JARAMIE

19:23 I, you know, I'm not too sure to be honest with you, I would.

GUS

19:29 Would I be able to, should I try my luck and see if I could speak to alone now if he's available?

JARAMIE

19:35 Yeah, I would can try real quick and... and most definitely CPS on there or not or let him know you're sending an email?

GUS

19:40 Yeah, and if not, we'll go ahead and yeah, I'll still go ahead and... and send out an email and I'll... I'll do that right now as we're speaking, I wanted to give you my undivided attention.

--- Wrap-up ---

GUS

19:48 So, haven't done it yet. But yeah, I'll go ahead and.

JARAMIE

19:51 Nope, nope. You. Yeah, great. Let me... let me see if he's still on his other line and then if they'd be, is that and yet we just still send it any way so I can tell him to get it done and... and schedule, but hang on one second. Okay?

GUS

20:07 Okay. Excellent.

JARAMIE

20:29 Hi, are you there?

GUS

20:31 Yeah, I'm still here? Yep?

JARAMIE

20:32 Okay. I just got myself back that time he didn't even answer. It is kinda roll back through to my... my work phone with him into my work phone. Has his Bond does when you call it if he's on his other line, so it might just get myself back. And as you can tell, I like to talk so I could probably talk to myself for hours, so.

GUS

20:37 Alright.

GUS

20:42 I do.

GUS

20:47 Alright. Well, no worries.

GUS

20:53 Well, I mean, that's... that's good because, you know, you can really specify like what you guys are really looking for and, you know, that's helpful. So, I, yeah, totally, I... I appreciate you taking the time to you really care about what you do and that's important, you know?

JARAMIE

21:00 Right.

JARAMIE



21:07 Exactly, exactly. And I just, I really do like service trade. So, I'm pulling for you really hard there by the way.

GUS

21:08 Yeah.

GUS

21:16 Awesome. Well, thanks for going to bat for us and just drafting this email now and I'll have that out to you guys shortly.

JARAMIE

21:19 Yeah.

JARAMIE

21:24 Okay, great. And feel free to call back if you haven't heard anything. I mean, it's not a big deal if you gave me a shout back. So, alright.

GUS

21:25 Yep.

GUS

21:28 Okay.

GUS

21:31 Okay. Cindy, I may do, I appreciate you so much. Take care. Okay?

JARAMIE

21:35 Yeah, you too. Thank you. Bye.

GUS

21:38 Thanks.

*The End*