



Call with Blackstone Mechanical - Zida Unknown

Brooke Caskey with Blackstone Mechanical
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Participants

SERVICETRADE

Brooke Caskey
Territory Manager

BLACKSTONE MECHANICAL

Zida
Controller

Topics

<i>Purchase decision</i>	1:12
<i>Implementation and ongoing support</i>	3:03
<i>Invoicing</i>	3:52
<i>Accounting</i>	4:19
<i>Accounting integrations</i>	5:36
<i>Assets</i>	7:44
<i>Purchase decision</i>	8:41
<i>Pricing</i>	9:07
<i>ST app contracts and pricing</i>	11:11
<i>Pricing</i>	11:34

Transcript

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ZIDA

0:00 Good morning, Blackstone mechanical.

BROOKE

0:02 Good morning. This is Brooke calling provider.

ZIDA

0:06 Sorry. Who's this?

BROOKE

0:08 This is Brooke from service trade.

ZIDA

0:10 Brooke. I will. Yeah. Sure. One sec here.

BROOKE

0:14 Okay.

ZIDA

0:49 Hi, Brooke. Hi, sorry, I was just sitting down with the project manager. I couldn't... I couldn't click in. Okay. So, is this gonna be like a... like a demo type? Like am I clicking on a Zoom link?

BROOKE

0:51 Hey, Sarah. Hey, I just wanted.

BROOKE

1:02 Yeah, I thought we can, it's not a demo, but I thought we could meet in my Zoom room. Does that work for you do... you? Do you want to just talk on the phone?

--- Purchase decision ---

ZIDA

1:12 I don't know. I thought it would just be like a quick like 20 minute kind of review or there's stuff that you wanted to show me?

BROOKE

1:19 Yeah, no, no, there's nothing I wanted to show you unless there's specific questions might require a visual. Really what I wanted to... to do today is answer your Quickbooks question, of course, and then just from, you... you know, who you've narrowed it down to what's become most important to you and kind of hear where you guys are at in your evaluation.

ZIDA

1:22 Okay.

ZIDA

1:29 Yeah.

ZIDA

1:40 Okay. Sure.

BROOKE

1:43 Yep. And so...

ZIDA

1:44 Yeah. So I spoke with calm you soft recently and BuildOps.

--- Purchase decision ends ---

ZIDA

1:49 So I think it would come down to you guys and BuildOps and call me soft. And I'm really just looking at all three. I think all three. Because just generally do like this, it's going to be the same thing like we're... we're getting the same type of service from everyone, it's gonna be everything's gonna be web based. I think what it's gonna come down to is whichever program has the best most compatible Quickbooks integration. And... and obviously, you are gonna look at price too. Like if we are, if we are finding three product set, basically do the same thing. Then we are going to look at price as well, like to help make our, yeah.

BROOKE

2:04 Okay.

BROOKE

2:24 Yeah, of course.

BROOKE

2:28 Okay. That makes sense. So, in terms of price, are... are they all pretty much on... on the same field or does once way... way different?

ZIDA

2:37 They are actually, they are quite different. Yeah, there is. I wanna say it's calm you solve that offers the first year on a monthly, like three months. And then... and then after that, we can... we can test it out and... and see if we liked the product and go ahead with it. And I know you guys are different. You guys are like a one year sign on, correct?

BROOKE

2:39 They are.

BROOKE

3:00 Yep. Yep. We do annual contracts.

--- Implementation and ongoing support ---

ZIDA

3:03 Yeah. Like there's no like testing periods like kinda just get our... get our toes web kind of thing.

BROOKE

3:10 Not really, but we do have the... the 96 percent retention rate and, you know, our... our support staff is... is there to help you make sure that everything is running smoothly throughout the year, cause our purposes just to form long-term partnerships.

--- Implementation and ongoing support ends ---

BROOKE

3:25 Of course, I haven't heard of calm you soft. Do they, are they built for service? I'm gonna do a quick search?

ZIDA

3:33 Yeah. Let me see my notes. I have notes here on call me so.

ZIDA

3:45 Cool. Yeah. Yeah. So basically the same thing they offer service and construction.

BROOKE

3:48 Annoying.

--- Invoicing ---

BROOKE

3:52 Okay.

ZIDA

3:54 And I... I have, I know I don't even have their pricing here. I must be on a different sheet. Yeah so... yeah. So like basically the same thing I guess, and they do. And they do integrate with Quickbooks as well.

BROOKE

4:04 Okay.

BROOKE

4:08 Okay. So on the Quickbooks note, so obviously we integrate with Quickbooks in terms of like the customer setup and invoicing when it comes to your question about the... the time card getting... getting the time over there, it's just a, it's a simple export out into either a CSV to, or an excel and then importing it into Quickbooks.

--- Accounting ---

BROOKE

4:29 It's not automatic or anything just to be fully honest about that.

ZIDA

4:34 Okay. So it goes to... to like an excel spreadsheet first.

BROOKE

4:39 Yep. So you would export it out of service trade. I mean, you can export that either to an excel sheet or a CSV file, and then from there, you can import that into Quickbooks. The... the time.

ZIDA

4:50 Okay. So how, like how seamless is that though? Like is there gonna be a lot of correction and data entry?

--- Accounting ends ---

BROOKE

4:59 So that I can't really speak on because I've heard varied experiences. We have the support staff that is... that is there to help with something like that. If... if there is a hiccup to make sure it's running smoothly. And so basically, you're not going to be in a bad place if it... if it doesn't go smoothly because you'll have someone here to help fix that. So either way you're going to get to the... to the results that you're looking for. But whether or not it works perfectly. The first time I can't really speak to that.

ZIDA

5:31 Okay. Yeah. I have to be honest, I don't know how I feel about that because that... that was one of the issues that we run into with FieldEdge.

ZIDA

5:40 It just, it wasn't... it wasn't seamless. It was it smooth. Like there was so many hiccups that we run into to the point where we just didn't want to do with it.

BROOKE

5:39 Yeah.

BROOKE

5:50 Okay. So it sounds... it sounds like what would help you is the opportunity to perhaps cast that?

--- Accounting integrations ends ---

ZIDA

6:00 Go to test it out. Okay?

BROOKE

6:01 Yeah. To test out how that export import works. It's something I have to ask about to see if it's... it's a possibility. It's not something we traditionally do but if that is something that's going to help you make your decision that I'm definitely happy to advocate for you. Would that... would that help?

ZIDA

6:18 Okay. Or even like a video or a demo or just, you know, just a quick demonstration just to see how... how it would work if that's available?

BROOKE

6:27 Yeah. So I would love to do it's. Funny as I asked to have that and they're like right now we don't have a technical video of it, but I'll see if I can go, I don't have, I don't have the right tools to, I'll... I'll go see if I can, if I can get a video for you. And then we'll start, if not, I can ask about testing it out because I completely understand, I'm super visual myself. And so some things like I can... I can be taught like we could talk through them, but something like that, I understand how it might help for you to... to see it. So I'll make a note of that to go get that for you.

ZIDA

6:41 Okay.

ZIDA

7:03 Okay.

BROOKE

7:03 But you... you mentioned that these three, the software is all pretty much do the same thing. Is there anything about either of the three that stands out to you as like a big difference? Or is it really just?

BROOKE

7:17 Does it, really? Does it really just, they're all the same?

ZIDA

7:20 I mean, they're not obviously not exactly the same, but they're basically going to.

ZIDA

7:27 You know, they basically have the same, basically the same setup they're going to be able to... to produce and access that checklist?

ZIDA

7:37 Scheduled maintenance? Is stuff like that. There was one I wanna say it was BuildOps if a... if a technician is on the roof and he takes a picture of the reading played, have a rooftop unit just by taking a picture of it... it, will automatically integrated and... and populate the model number, serial number into the... into the program that I thought was like, I've never seen that before.

--- Assets ---

BROOKE

8:05 So like barcode scanning but through... through a photo basically.

ZIDA

8:09 Yeah, yeah. Like it doesn't just take a picture of the unit. Like it actually takes the information from the name plate and transfer that into model number, serial number, which I thought was really cool... like that like that's. I think that was the one thing that stood out from them.

BROOKE

8:21 Yeah, that's cool.

--- Assets ends ---

BROOKE

8:26 And then it stays in the system or do they have to take the picture each time?

ZIDA

8:30 No, it would stay in there. Yeah, it populates in that space. Yeah.

BROOKE

8:32 Okay.

BROOKE

8:35 I didn't know that... that about Bill. I've... I've talked to a few people on it, but you're right?

--- *Purchase decision* ---

BROOKE

8:41 All these companies really do very similar things. So, it's hard not to get the next tab. Okay? So, when are you guys looking to make your final decision by?

ZIDA

8:52 That is a good question. I know. I don't know, I keep pushing it for.

ZIDA

8:57 I really want to make the decision this month, like, I don't know exactly when, but I just, I want to get, I just want to get this done and move forward with it, and I want to get it done this month.

BROOKE

9:00 Okay.

--- *Pricing* ---

BROOKE

9:07 Exactly. Okay. So I can get you that video and clear up some of the... the curiosity about transporting time into Quickbooks. And then I can also ask about perhaps like a 10 percent discount to help even out the pricing. I'm not sure where do we live in the... in the cost between the three?

ZIDA

9:29 On the higher side?

BROOKE

9:31 Okay. Yeah. So, because I have you quoted at let's see here. Let me make sure I'm not miss speaking here.

ZIDA

9:32 Yeah.

ZIDA

9:41 Like if we just went with the select package.

BROOKE

9:45 Okay. Let me.

BROOKE

9:49 And it's nine tax.

BROOKE

9:52 Okay.

BROOKE

9:58 Hold on. Let me do it this way. I was trying to do mental math and I realized that's not the smartest thing to do.

BROOKE

10:09 Okay.

BROOKE

10:15 I'm gonna do this and the context that you're going to get time card, the... the service type card.

ZIDA

10:20 Okay. Like that's extra.

BROOKE

10:25 Yeah, it's... it's 14 dollars per tack per month.

BROOKE

10:32 Okay. So your first year total would be 13,343, and then your annual subscription would be 10,044 dollars without a discount. And so I can advocate for you guys. Okay?

ZIDA

10:45 Sent out 10,000 US. Yeah.

BROOKE

10:48 Yeah.

ZIDA

10:49 Okay.

BROOKE

10:52 Is that in the budget?

ZIDA

10:56 Let me look at that. So, how would that break down monthly? Can you break that down monthly?

BROOKE

11:02 Yes, I can, but we Bill annually.

ZIDA

11:06 Okay. Hey, Dave. So Monday, that would be eight 37 US.

--- *ST app contracts and pricing* ---

ZIDA

11:11 Yeah, that's still kind of on the high side? I don't know if that's something that budget. I wasn't really given a budget, but I mean, I was just told just to, you know, compare pricing and that is... that is still on the high side.

BROOKE

11:24 Hello? Yeah, I can.

ZIDA

11:25 Yeah, mine, that's like that's US dollars. So for that... that's... that's...

--- *Pricing* ---

BROOKE

11:34 Yeah. Let me go. Let me see how much it would be with the discount.

BROOKE

11:41 Okay.

BROOKE

11:44 Because I'm sure I could get 10 percent it approved. I can also ask about 15. I can't go higher than that, but let me see what we would be looking at hypothetically.

ZIDA

11:55 Okay. Yeah. And in the meantime, I'll... I'll discuss with Aaron and Shawn and... and let them know like just kind of a realistic number but they can give or that they were hoping for and just see if you guys fall within that.

BROOKE

12:10 Yeah. Here one sec. I'm calculating. So if I could get the 10 percent, it would be down to 9,039 per year and you'd be saving over a 1,000 dollars through that. If I could get it down to 15, it'll be 8,000, 537 dollars per year and you'd be saving... saving 1,500 dollars through that, just give you an idea of how we might help ease... ease. That. Is that... that hit?

ZIDA

12:10 Yeah.

BROOKE

12:36 Okay. So if I can get you that video of the time card and then get the discounts approved, is it, is this something that you could make a decision with within the next two weeks? Or do you just need time where it, what, what's kind of your next step in... in evaluating everything?

--- Pricing ends ---

ZIDA

12:54 Yeah. Let's... let's give it two weeks.

BROOKE

12:57 Okay. Okay. So I'll go talk to my manager about those two items and then I'll... I'll be in touch later today, if not early in the week, next week. I'm going out of town tomorrow or Friday or if they would be in touch this week too, but I'll try... I'll try my best to get something to you today.

ZIDA

13:01 Okay.

ZIDA

13:12 Okay. Awesome. That sounds good. Yeah. Just shoot me an email. If you're able to get something put together.

BROOKE

13:13 Okay.

BROOKE

13:18 Yeah. And do you have any other questions about service trade itself or about the onboarding anything at all that you're curious about?

ZIDA

13:24 No, I think that's good.

BROOKE

13:26 Okay. Perfect. Well, I will go get those things figured out for you. I appreciate your time.

ZIDA

13:31 Okay. Thanks, Brooke. Take care.

BROOKE

13:33 Okay. Bye, bye bye.

The End