



# **ServiceTrade Regroup w/ Allied Fire Protection**

Matt Hetrick with Allied Fire Protection - TX  
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## **Participants**

### **SERVICETRADE**

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### **ALLIED FIRE PROTECTION - TX**

KRYSTAL RODRIGUEZ  
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### **OTHER**

Rick Wright

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# Transcript

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LAUREN

0:00 Hello?

MATT

0:00 Hey, there we've got a Rick, right? Entering. They're in the waiting room.

LAUREN

0:06 I don't know who that is. I wouldn't let them in unless you know who they are... or you do, and then just remove them if they're not who they say they are.

MATT

0:18 Yeah, let's do that.

TANYA

0:31 Hey, I'm gonna stand mute. I'm still in the car. I should be home in about five minutes cool.

MATT

0:36 Okay. Thanks Tanya.

TANYA

0:38 It sure.

LAUREN

0:39 Is on.

TANYA

0:41 Hey, how are you? I'm...

LAUREN

0:43 Good. How are you?

MATT

0:55 Hey, guys?

RICK

0:56 Can you hear?

MATT

0:58 Yeah, we can.

MATT

1:04 Can you guys hear us?

RICK

1:05 I'm clear.

MATT

1:08 Yeah, we saw Rick Wright joining. I'm like, I've never heard of this guy. I hope there's a reason behind this.

RICK

1:14 To, to...

RICK

1:20 This is cross.

RICK

1:22 I invited, didn't you?

MATT

1:26 She should be, yeah, double check the invite here.

RICK

1:33 Just okay.

RICK

1:37 Three minutes ago, it was muggy, and, I get it.

RICK

1:40 Yeah, a visual.

MATT

1:44 She's on there. I haven't seen her join yet. Is, is Michael joining us?

RICK

1:49 Our CEO is leaving for Africa tomorrow for two weeks, so, he's got some things before he depart.

MATT

1:58 Gotcha. Okay?

RICK

2:00 We got.

RICK

2:01 We can cover down, no, don't worry.

MATT

2:03 Okay. I just didn't want to leave anybody out.

MATT

2:11 We...

RICK

2:12 Probably get started.

RICK

2:13 Not really part.

MATT

2:17 What's...

RICK

2:17 That I was just looking at the camera view.

MATT

2:22 You do? Yeah, it's like, the cool kids in the back of the class. Cool. Well, yeah.

--- Purchase decision ---

MATT

2:31 So, it's been a few weeks. I hope it's been productive on your end. Lauren and I just wanted, to touch base. See how, the ERP evaluation is going and just get, a good read on next steps, for service trade for you guys. So... yeah, how have things been going with the ERP evaluation?

--- Purchase decision ends ---

RICK

2:56 It's...

RICK

2:58 Where yeah.

RICK

3:00 I think.

RICK

3:00 We're progressing far along. I think we're down to probably Oracle net and Sage intact. I think we're down to those two final. We kinda crossed, the triple Viewpoint off the list but I think we're getting closer.

RICK

3:19 I think a lot of that stems from Matt. I had a conversation when we set it all touch base. Again, that thinking is now is to start with the... integration first and then subsequently time in two to three months after, for a service platform.

RICK

3:46 I'm sorry, do you agree with?

RICK

3:50 No, I think maybe it and I'm not sure we know the exact sequence of that. You know, for example, if we're leaning towards Sage, maybe today kind of running those concurrently. Now. I guess the timing between those, maybe there be some hand off things you can do on the front end on the ERP and then maybe service a little bit after that. But I think at this point, we're probably leaning towards going live for or starting implementation on both the service trade and an ERP at the same time, which pieces, you know, kind of back between those.

RICK

4:30 Yeah, part architect.

RICK

4:33 But I think the answer is concurrently.

RICK

4:36 Earlier.

RICK

4:41 The concern was that it was gonna be pushed longer, not that it was gonna be concurrent. So that's why.

MATT

4:51 So that's that is a good idea if you guys. So that is the conversation that Kyle and I had is that there's a good reason there's a good case to be made for... not necessarily investing in integration with Computerease in the meantime. Whereas if you've already narrowed it down on your ERP, then just cut that step out and invest that money instead in that time into whatever ERP you're going with. So that's why I brought Tanya on the call as well because whenever you're looking to do both at the same time, it's very critical to get both of your software and implementation teams talking to each other early on. So we can help map that out. The good news about that approach as well. Is that for the most part you guys are going to have separate teams working on each initiative with, you know, your service team working primarily in service trade and your accounting side working primarily with your ERP system.

*--- Accounting integrations ---*

MATT

5:47 So it can go very smoothly doing both at the same time. If that's the route that you're looking to go.

RICK

5:54 Well, most likely, it's still going to be Steven and Michael and Crystal and I working on both sides of it, the ERP side because we still have Construction and remodel that we're going to have to work through how that would work with whatever ERP we go with there.

*--- Accounting integrations ends ---*

RICK

6:14 But yes, Kyle will be incidentally involved in, the service side and we will be pulling service managers and other team members into that implementation for sure. So, but we, the four of us five of us probably be on both.

MATT

6:34 Yeah, yeah. And what I meant more is that the implementation of an ERP system, you know, being concurrent with the implementation of service trade will not be more disruptive to your service operation because they're still just primarily involved in ServiceTrade.

RICK

6:50 Agree agree and they would only have to do it once instead of twice.

MATT

6:55 Yeah, exactly. So, are you guys, are you still on the boat where you're waiting to sign on? Make it official with service trade before you have identified and are signing on with NetSuite or intact?

RICK

7:11 More or meeting with the?

RICK

7:17 Yeah, yeah, we're gonna have that probably one more final option next week that has both the Construction and service component. I think that's really kind of the last one we're gonna have put on the list to look at. And then we'll do final evaluation from there. So I think we're gonna make a decision for everything all at the same time. But certainly if you guys want to look and we haven't talked about pricing or anything since that initial meeting. If there's anything you guys can do kind of final numbers, sharpen your pencil on that type of stuff. You know, please let us know cause I think that'll kinda be once we see that final piece, you know, evaluating which way we wanna go in all services. So I think that's kinda where we're at with, I do think it'll be within the next week or two or probably end of next week, we'll have our decisions done.

--- Accounting integrations ---

MATT

8:10 Okay. So you guys we talked about intact and NetSuite, did you say that there, is it another service module that you're looking at? That does both Construction and service?

RICK

8:20 Yes.

MATT

8:22 Okay. What's the, what's the name of that one? Just curious.

RICK

8:26 It's up to...

RICK

8:27 BuildOps. I...

RICK

8:28 Think a.

MATT

8:29 Okay.



MATT

8:31 So, are you guys thinking that you're going to evaluate that in one meeting next week or you think that's going to be a process that looks kinda like how you've evaluated service trade?

RICK

8:41 I think that will depend on how that first meeting goes well, then that's worth spending more time on?

*--- Accounting integrations ---*

MATT

8:47 Gotcha.

LAUREN

8:48 I'm curious to know, if you don't mind, is there something about service trade you were unsure about? That kinda led you in down the path of looking at BuildOps?

RICK

8:58 More on the Construction side.

RICK

9:01 I think it's more of an integrated approach to both service and Construction, one platform with the RP versus we're really looking.

RICK

9:13 To do.

RICK

9:15 For a, under this platform, a service option and then a separate Construction operations platform. And so we're looking to see if we can narrow that down to just two, two partners versus having three. And so that was an option that was presented to us. We're curious about it.

*--- Accounting integrations ends ---*

RICK

9:39 So we want to bet that. And then we'll be like you said based on how that meeting goes determine if we want to take next steps.

RICK

9:49 Yeah. In an ideal world, obviously, we have, you know, a perfect Construction system and a service software all built in or not plugged into two third parties, but, you know, evaluating what, you know, are those separated things more worthwhile

than something built all together? So just part of the evaluation, we're trying to look under all the rocks we can find.

*--- Type of work ---*

MATT

10:14 Well...

LAUREN

10:14 Was our project management stuff just too light for what you all do? Is that, is that my under?

RICK

10:22 Yeah. On the Construction side, for sure. The server side, there's no question about the software Construction side with we do, I think we have 140... the...

RICK

10:38 100.

RICK

10:39 Numbers, yeah. On Construction side working all over in different areas as well as different aspects of the job and a lot of our Construction business actually general contractors already. And it also allows us to do estimates.

RICK

11:00 Yeah. So the Construction piece and we probably mentioned on the first call or to, is the, you know, currently the significant portion of our revenue.

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

RICK

11:08 So it is a huge critical piece. And just thinking through what, the best answer for that on an ERP or pro core or build up on the Construction side, you know, has taken us down a bunch of different routes. How does that plug into a service trade? Now? What does that mean for a service trade? So again, we're just trying to evaluate our options and make the most intelligent decision for both Construction and service?

MATT

11:33 Are you guys still looking at pro core?

RICK

11:35 Yes, yeah.

RICK

11:36 Yeah.

RICK

11:36 Okay. Absolutely.

RICK

11:39 This is like we said, this other option is like you can call it a final effort from... that direct integration for their piece. So.

--- Pricing ---

MATT

11:53 So, NetSuite recommended BuildOps?

RICK

11:57 That is correct.

MATT

11:59 Gotcha. Okay. Good to know. Okay, well, we can definitely work on the pricing. I don't think that we ever got a budget from you guys or, you know, what would make the most sense for you number wise if there was a number you were looking to hit, and then also a lot of times customers your size will be looking at a multi year deal versus a one year deal.

--- Purchase decision ---

MATT

12:23 So it would be helpful to get some of that feedback from you guys to kinda give us a direction to go in with the pricing. Have you given that any thought?

RICK

12:32 I'm not a big fan of budgets. To be perfectly honest. I'm a fan of what, your best cost is for what, you know, we're looking.

--- Pricing ---

MATT

12:41 Work, so.

RICK

12:42 I prefer that you provide us with your best proposal in that regard. I would say that we're absolutely open to multiple years, two, three year options there and what that could look like.

RICK

12:56 More, yeah... you can give it a couple of options on that. I think it would make perfect sense. Yeah, three or a five year whatever you guys typically, you know?

RICK

13:06 And then current me if I'm wrong now, but it's based on field technicians, the pricing for service?

MATT

13:12 That's correct? Yep.

RICK

13:14 You field technician number?

LAUREN

13:17 We have.

MATT

13:17 It on.

RICK

13:19 We can get you, not that you can build out a five pencil number.

MATT

13:25 A, what?

RICK

13:26 I'm finally to?

MATT

13:29 Gotcha. Yeah, I think the last we had you guys were at 70 texts or that's what you were projecting you'd have by the time you go live with it, is that accurate?

RICK

13:39 Probably 60 to start with to start with. But then we would come in exactly where we need to be. And then we can also add later, correct?

MATT

13:51 Yeah.

RICK

13:52 You can't subtract until the can.

RICK

13:55 I think 60 is still a number. And then obviously, if there's any immediately they need to be, I just go with unit rate of, the ad from there. So I think 60 is still a good number.

MATT

14:04 Okay. Yeah. And then last variable here is, I think we presented you with both premium which is the minimum tier you would need for integrations and also enterprise, which comes with the recurring invoices and the business analytics. I think in our most recent conversations, you guys were leaning more towards the enterprise. So, is that what we'll be shooting for?

*--- Pricing ends ---*

RICK

14:29 Later, but I'm almost wanting to start with, the first one.

MATT

14:36 Premium is the middle tier that's the minimum that you need. And then enterprise comes with the business analytics and the recurring invoices and some other.

RICK

14:45 For Sage specifically, I think one of our very recent conversations was a lot of the internet very well with you guys, a lot of that information would flow back.

*--- Accounting integrations ---*

RICK

14:55 So potentially we could do more robust reporting in Sage because it has, yeah, all of that integrated. So, I don't know, you know, today, if we need all the extra stuff in service, right? But that's something you said you can upgrade this to later depending on if we needed it, right?

*--- Recurring maintenance ---*

MATT

15:12 Yep. That's exactly right.

RICK

15:14 That's fine.

RICK

15:15 We do need to consider that though for the recurring inspection side and for the monitoring side if we're going to be doing recurring invoice. So that's the only option you have for doing that type of billing or scheduling. And I know you, how you use the word scheduling maybe a little bit different than what I'm saying. But, you know, if you're going to have a year long contract with 12 different... inspections in it and it's a three year long contract, you know, how does that work within the system and monitoring this billed monthly quarterly annually, et cetera. Ongoing? Are you saying that those need to be enterprise?

MATT

15:59 No. So, your recurring services like your inspections, the bulk of what you guys do that's already in service trade. The only thing that enterprise, is giving you on top of that is the recurring invoices which usually pertains more to the monitoring where maybe there isn't a service that happens that a Bill is based on, where it says a monthly billing that's automatically happening as you guys have those monitoring contracts.

--- Pricing ---

RICK

16:27 So maybe it would be best just to provide a cost for both tiers at those, you know, three year, five year options for.

RICK

16:36 Contracts.

MATT

16:37 Okay. And the other thing that I'll say is the reporting in intact is very robust. If Tanya, you can keep me honest on this.

--- Quoting ---

MATT

16:45 If I'm not mistaken, it will be more about financial reporting. Whereas the reporting that you would get through service rates, business analytics would be more of the service performance and KPI'S around like deficiencies quote, pipeline, close rates. And then even, you know, there's different metrics you might want to track just for your technicians in the actual operation there.

--- Purchase decision ---

RICK

17:06 That's type of them.

RICK

17:09 Just...

RICK

17:10 So that down a little bit.

RICK

17:13 Yeah, yeah. We can talk off line, but from my perspective, it's a, without an analytics directly. So... yeah.

MATT

17:26 Okay. That sounds good. So we will get to work on, the pricing on our side. Your next steps is you have a meeting with BuildOps next week? Is that right?

--- Purchase decision ends ---

RICK

17:38 Next Monday?

MATT

17:40 Next Monday? Okay? Yep.

TANYA

17:43 Now, I was curious, I know you guys are still evaluating NetSuite and intact. So, does BuildOps work with NetSuite?

RICK

17:52 Yes. Yeah, that was recommended for NetSuite. Okay? It did not come up with a Sage intact.

TANYA

18:04 Interesting. Okay. Interesting.

RICK

18:06 It's our understanding that they have a direct partnership with BuildOps that it's not through a third party.

TANYA

18:16 That must be new. I hadn't heard that.

MATT

18:22 Yeah. Okay. So you guys have the meeting with BuildOps and then you have other meetings with NetSuite and intact?

LAUREN

18:30 On the calendar?

RICK

18:31 We do no one.

MATT

18:35 Okay. And you guys said you were looking to make a decision on all of it in two weeks?

RICK

18:43 I'd say end of next week or into the next week?

MATT

18:52 So...

RICK

18:52 Probably the pricing.

RICK

18:54 Additional meetings with BuildOps if need.

RICK

18:58 Sorry?

RICK

18:58 Pricing, yes.

RICK

18:59 Ideally by the tenth, which is Wednesday of two weeks from now... or two weeks from tomorrow.

RICK

19:09 First week is, so, yeah.

LAUREN

19:12 I'm gonna go on a limb and be so bold as to say that you're gonna prefer service trade, for lots of reasons mainly because we were designed specifically for fire. I'm not certain. They have a lot of tried and true fire life safety contractors in their portfolio of customers whereas we have over, I don't know how many 650 at least. So, I think I trust you guys to make the right choice for your business. But I also know that from my experience with BuildOps, they're very heavy in the mechanical space and their platform flex that. I don't know that they do a lot of inspection reporting. I certainly don't think deficiencies is in their vernacular. So, and I, I've



heard that they have funding from Siemens, which if I were in your shoes, I'd be a little bit nervous about the possible exit strategy on their side of things like selling all that data to Siemens. So just that's just my perspective on the whole thing. Seeing how I've been at service trade for seven years and BuildOps, I can't think of one fire customer that they have. So that's just my perspective on the BuildOps side of things.

MATT

20:34 Not not necessarily a casting shade on Bill us, but just educating you guys at something to keep an eye on that they were born in the mechanical space.

--- *Purchase decision* ---

MATT

20:43 They're I think they're about half the age of service rate. So, it's just something to keep an eye on when you're going through it, make sure you ask those questions and kinda look at, you know, how it's built and what industry it's tailored for.

RICK

20:57 Thanks for the insight.

LAUREN

20:59 Yeah, for sure. And I think you've talked with references, but we're happy to provide as many as you can shake a stick at. So I encourage you to ask them the same, and that was shaded.

MATT

21:12 Hello, Lauren?

RICK

21:16 More that I can shake a stick up.

LAUREN

21:19 You can, you can talk to whoever you want. All of our customers love talking about how much they love service, right? So, pay us for that privilege.

MATT

21:30 Have you guys actually talked to service rate customers yet?

RICK

21:33 I've talked with you.

MATT

21:35 Yeah. Okay. Yeah. Well, I'll echo, Lauren, let us know if there's a few more that, you need in the final stages of your decision making process.

RICK

21:43 Everybody said the same thing. It's the integration from the first from the time we go, the contract to go live is most integral part.

--- *Purchase decision ends* ---

RICK

21:55 And if you don't or procedures on that part, it's hard on the back end. But if you're doing, right, it's fantastic.

MATT

22:03 Yeah, always cut one.

RICK

22:07 Implementation is important.

MATT

22:10 Great.

RICK

22:10 So, mapping and how we want to utilize the system, you know, that is everybody sees.

RICK

22:21 Thrill...

RICK

22:22 And say, good luck.

RICK

22:26 Say...

RICK

22:27 I was saying.

RICK

22:28 I...

RICK

22:31 All right. Anything else? Tell?

MATT

22:33 Today, no. Anything else you guys need from us other than the pricing.

RICK

22:39 Hey...

RICK

22:40 We're good.

MATT

22:41 Okay. Well, thanks again, guys for taking some time to meet with us. Glad to hear.

RICK

22:45 That, the ERP evaluation.

MATT

22:47 Has been productive. Well, should we shoot to follow up, put a meeting on the schedule and make sure we have something?

RICK

22:59 You can touch base with an email then figure something out based on Tuesday or Wednesday next week.

MATT

23:07 Okay. Well.

LAUREN

23:08 We wanna, we wanna connect just to go over the pricing, right?

MATT

23:12 Yeah, we will, yeah.

RICK

23:14 Little it over to... you. I.

LAUREN

23:22 I already have some ideas. You said you said one of the magic words and I won't say what that is, but, we've, got some flexibility.

RICK

23:35 It's good to me.

LAUREN

23:36 Yeah.

RICK

23:39 Yeah.

MATT

23:40 We'll get you. We should get you the pricing by the end of the week, but I think sooner than that, and then, yeah, we'll schedule some time to go over that with you.

RICK

23:51 Sounds good.

RICK

23:52 All right. Appreciate all this time.

MATT

23:55 Yeah, thank you guys. Keep having a great day.

RICK

23:58 Thank you.

MATT

23:59 Bye.

RICK

24:00 Bye.

*The End*