



Call with Harder Mechanical - Katrina Newberry

Sarah Pittard with Harder Mechanical
Recorded on 2/11/22 via SalesLoft, 16 min.

Participants

SERVICETRADE

Sarah Pittard
Territory Manager

HARDER MECHANICAL

Katrina Newberry
HVAC and R Service Mechanic

Topics

<i>Call Setup</i>	0:00
<i>Pricing</i>	7:19
<i>Wrap-up</i>	13:09

Transcript

"This English transcript was generated using Gong's speech-to-text technology"

--- Call Setup ---

KATRINA

0:00 Good morning.

SARAH

0:02 Hey, good morning. Is this Katrina? Hey, Katrina. This is Sarah calling from service trade. How are you?

KATRINA

0:04 It is.

KATRINA

0:09 I'm good. I recognize the number.

SARAH

0:14 This is now an, okay time. Did I catch you at an?

KATRINA

0:16 Yes, yep. Nope. You're good.

SARAH

0:18 Okay, perfect. I'll keep it brief, but to kind of best prepare my manager for the meeting and make the most of your time, I just wanted to learn a little bit more about your company as far as the type of work you guys are doing, what your current process looks like.

--- Call Setup ends ---

SARAH

0:34 And then some of the things that you're specifically looking for in a service management software, and then we can pull up the calendar and find a good day and time that works for you for a demo. How does that sound?

KATRINA

0:45 That works for me?

SARAH

0:47 Okay, perfect. Yeah, if you just want to go ahead and tell me a little bit about you guys.

KATRINA

0:54 So, we are a brand new service department. We have been, this company has been in the construction industry since like the 19 thirties, but they decided to launch a service department last year and.

KATRINA

1:14 Service and construction world are completely different. And so essentially, the way that they are doing things doesn't quite fit the service workflow, or, you know, the... the high pace of the service workflow, they have been building their own platform through quick base for the last couple of years. And it works great when you have a big project that doesn't need to be, you know, so you don't need po is and job numbers for payroll, you know, in a quick time line. So, I'm with service timecard, we're looking for something where we can generate those work orders and those customer accounts quickly and also be able too input our maintenance contracts, possibly use it as a maintenance contract pricing tool. I don't know you guys have that capability.

SARAH

1:18 Yeah.

KATRINA

2:30 Because currently, right now, we have to go into, you know, one app and open are what they call like job number, which would essentially be.

KATRINA

2:45 Our customer account, and then I'll have that we have to create a contract. And then off of that, we have to create an owner and then we have to open a different app to create a service ticket. And then we have to open a different app to create po. And so.

SARAH

2:57 Huh.

KATRINA

3:04 It's just not very streamlined. Have had an exorbitant amount of pushback. You're not the first company I've called and had demoed.

KATRINA

3:19 The, the biggest hurdle we are running into is the...

KATRINA

3:25 Integration to our accounting platform. The.

KATRINA

3:31 CFO.

KATRINA

3:35 You know, doesn't want to have to change anything about the way that they are working and which is, yeah, they don't want to have to do a whole bunch of accounting oversight.

SARAH

3:52 What are you guys currently your accounting system?

KATRINA

3:56 Viewpoint this stuff?

SARAH

3:58 Okay. So we actually are able to work with Viewpoint. Let's see and y'all are using that for your construction side as well.

KATRINA

4:08 Yeah. And so, and like the way that they have things set up is, you know, they do things through like phases. I don't know if that makes any sense to you... but like essentially... I... I kind of would like... you know, something to.

KATRINA

4:38 Like almost live outside of this stuff, but then be able too.

KATRINA

4:47 You know, push information to vista, I guess in a way.

SARAH

4:53 Yeah. So, are you guys, you said you're using a platform that you are built through quick phase? Is that correct? I've never heard of Quickbooks. So, is it all digital right now? Are your guys like on any paperwork orders or no?

KATRINA

5:02 Yeah, yeah.

KATRINA

5:11 So...

KATRINA

5:16 Because our service app isn't completely functional in quick base. Yeah, we are still the guys are still doing paper work orders.

SARAH

5:28 Okay. And you have five service techs, is that right?

KATRINA

5:36 Yeah, we have three service techs, and then two plumbers?

SARAH

5:42 Okay.

SARAH

5:45 And what state is that you guys are in?

KATRINA

5:49 We're in Oregon?

SARAH

5:51 Okay. Gotcha.

SARAH

5:54 And are you guys doing strictly commercial service work? Do you all do any residential?

KATRINA

6:01 No, the only residential we would do would be for like important customers or other important years?

SARAH

6:08 Yeah. Okay. Gotcha. Let's see.

SARAH

6:16 Okay. And so you are using this to the point for accounting looking just to kind of streamline everything and be able to work in tandem with this. The Viewpoint, are you guys, so your service departments fully separate or your guys doing any installer? They just strictly like preventative maintenance repairs, service work.

KATRINA

6:39 We'll be doing, we... we do some install and projects. So where... where are you? The... the goal is that we will be kind have a, you know, controls, install maintenance

and repair, service, maintenance and repair, and then like smaller scale projects, you know, quick turn, quick turnaround projects.

SARAH

7:03 Gotcha.

SARAH

7:06 Yeah. Okay. And are you all currently tracking your preventative maintenance schedule through your in house system?

KATRINA

7:16 No, we don't have the ability to do that. We, we're using another app.

--- Pricing ---

KATRINA

7:24 Well, honestly, I'm... I'm keeping track of when things need to be done, you know, just kind of in my own head and on paper. But we do have, we've been using this system called Northboundary as a pricing tool. And in that we can, you know, when we set up the agreements and to send off to the customer for approval, we can put it in a month. And so that's you know, pretty much the only way we're really tracking anything right now.

SARAH

7:19 Okay.

SARAH

8:02 Gotcha. What would you say? The percent of like preventative maintenance versus just other service work? Like repairs would be instead about like 50 50 or the Halloween more than one side?

KATRINA

8:15 We're we're about 50 50 right now.

SARAH

8:18 Okay, cool.

SARAH

8:23 Okay. Let's see. So have you do it'll, be all kinds of thought about a budget for software. Do y'all, have a private like budget in mind?

KATRINA

8:34 No, I know, like, so, you know, we, like I said, I've looked, we've looked at multiple things that I think, you know, we even look, hey, this is the biggest issue

that we're having, you know, with the accounting department is that Viewpoint vista and itself has its own service module that they didn't want us to use.

SARAH

9:03 Yeah.

KATRINA

9:04 And so they're module, you know, we were going to have to pay. It was like 11 grand for the module and then like an annual of like 5,000 dollars for the amount of text that we have and then BuildOps. We had talked to them and they were, I think 12, how they were like a 1,000 dollars a month, 1,000 dollars a year.

--- Pricing ends ---

KATRINA

9:31 It's just, it's kind of all over the place. I honestly wasn't even in the mood to walk down another avenue because I just have a feeling that I'm gonna get told no again but our sales manager.

KATRINA

9:52 One of his like I don't know, but he is in the sales world told him that he should look into or that, you know, we should look into you guys. And I was just like, okay, you know... I will... I will just for you because you want me to, but I really have no hope that anyone's gonna say yes.

SARAH

10:22 Hey, that.

SARAH

10:25 Okay. Yeah. No worries. I am really excited for you to get a look at service trade because I think that we will be a really good fit for you guys and kind of what you're looking for. It's service trade does end up being a great fit and kind of within your budget. You all have a timeline for when you wanted to get, would want to, I can get started or would it just kinda be possible her?

KATRINA

10:47 It would, it would kind of be as soon as possible, like I started in August and I was just the service tack. And when I came on, I thought I was coming into something that...

KATRINA

11:00 Was somewhat functional and then I realized that... that was not the case at all. And so I had been spending the majority of my time trying to get something up and running. And then it was kinda made aware that my former boss haven't been doing his job. And so.

SARAH

11:08 Huh.

SARAH

11:25 Man.

KATRINA

11:28 You know, cause me as a tech coming in shouldn't have been doing everything that I was having to do. And so then he got let go. And now I've been put in his position since I was doing everything anyways. But... yeah. So I'm just trying to. I, so I don't I only have currently on my payroll one technician, but all those other or like I've been pushing out their start dates because I don't want to bring them all in and have to manage them the way I'm managing one person right now. So... you know, I can do it for short of time, I think, but long term having to manage, you know, the five technicians, the way that I'm managing the, or, I guess the two right now, it's just it's kind of an all day thing inside. I can't it's hard to get everything that I need to get done in a day because of the way that I'm doing it. So... I've been... I've been pushing the other ones off, but I can't push them off any longer because I have work that I need to get completed. But, yeah.

SARAH

12:06 Huh.

SARAH

12:28 Yeah.

SARAH

12:36 Yeah.

SARAH

12:42 Yeah.

SARAH

12:47 I can use the hand. So, are you... are you the service manager over there now. Is that your role?

KATRINA

12:51 Yeah. Yeah.

SARAH

12:54 Cool. Well, let's see. So you'll be meeting with broke for the demo. She has some time today, if you would have any time, the demonstration takes about 30 minutes of the platform that we block off an hour, just depending on kind of how many questions you have.

--- Wrap-up ---

SARAH

13:09 So it typically takes from like 45 minutes to an hour. Would you have any time to hey to do that or do you wanna shoot for sometime next week?

KATRINA

13:18 What, what time today?

SARAH

13:20 Let's see, are you are Pacific Time?

KATRINA

13:23 Yeah.

SARAH

13:25 Let's see.

SARAH

13:28 She's pretty open. We're in North Carolina. So we're eastern.

SARAH

13:34 Let's see.

SARAH

13:37 So, she could do any time this morning for you?

SARAH

13:44 Would you have any time this morning or like what time would work for you?

KATRINA

13:49 So, at, let me see what time I... I have a, I had.

KATRINA

13:59 I had to do a leadership class and assessment and so I have to go discuss my results today, where, yeah, yeah, super exciting.

SARAH

14:12 Yeah.

KATRINA

14:16 But that is at 10 30 and I would need to leave my office by like 945. So I have the next two and a half hours with nothing scheduled.

SARAH

14:31 Okay. Let's see. So.

SARAH

14:38 She could do.

SARAH

14:42 11 30.

SARAH

14:45 She could do 11 30 our time. So it eight 30 your time, would that work here and a little bit?

KATRINA

14:56 Yeah... that definitely works.

SARAH

14:57 Okay. And let me make sure I have your correct email address. Hey, newberry. Harder. Dotcom?

KATRINA

15:06 Yup.

SARAH

15:07 Okay. And do you want me to add anyone else to the demo? Or will it just be you?

KATRINA

15:12 You can add a G Wallace at Harder dotcom?

SARAH

15:19 Okay. Is it GW a LL a CE. Okay. And what is their name?

KATRINA

15:23 Yep.

KATRINA

15:26 Greg Wallace?

SARAH

15:28 Okay. And what's his role with you guys?

KATRINA

15:31 He is the service sales manager.

SARAH

15:35 Okay. Gotcha. Okay. Perfect. I will go ahead and shoot you both over an email with a Google calendar invite for eight 30 Pacific Time. And then if you can just accept it, so I know that you received it, and then it'll have the Zoom link in there. So you should be able to click that link and it'll take you right into the meeting with Brooke?

KATRINA

15:56 Perfect.

SARAH

15:57 Alright. Thanks so much for your time, Katrina. I'm excited for you to get a look at service, right? So we'll see you guys here in a little bit. Alright, thank you. Bye.

KATRINA

16:04 Alright. Thank you. All right. Bye.

The End