



ServiceTrade Review- ServiceForms Sync

Juanita Guzman with Anderson Mechanical Services
Recorded on 9/18/23 via Zoom, 20 min.

Participants

SERVICETRADE

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ANDERSON MECHANICAL SERVICES

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Topics

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Transcript

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

JONATHAN

0:00 Hey, can you hear me?

JUANITA

0:01 Hey, Jonathan, yes, how are you doing?

JONATHAN

0:05 Good. How are you?

JUANITA

0:06 I'm good. You know, just trying to keep up as I'm sure you are as well, but I think you guys are gonna be coming into a slower season hopefully.

JONATHAN

0:19 We kinda catch up on everything.

JUANITA

0:25 Okay. That makes sense.

JONATHAN

0:27 When it gets cold, we'll get busy again because people heat.

JUANITA

0:30 Yep, goodness. Okay. Anyway, let's talk service forms just to make sure like we're both on the same page and make sure that we can deliver on like the timeline that you guys have in mind.

--- Pricing ---

JONATHAN

0:45 So, I presented the pricing to my director and 10 our president, and the feedback was the same as it was before the pricing, the 50 dollars per tech per month is too expensive for the functionality being offered. We appreciate the discount for setup and all that. But, the problem with the pricing was how expensive it is on a maintenance level. So they don't feel like there's enough value in the 50 dollars protect per month to justify that additional 20,000 dollars. So they want to green

light the asset migration because that's something that we would like to do anyway. And then they want to hold off because tasking was gonna be included for free. They want to hold off for that to see if that will do basically the same thing we want service forms to do. But right now, they feel like the price point on service forms is too high because that 50 dollars protect per month has changed and that's what we were really hoping Billy would address.

JUANITA

2:03 Okay. I can talk to him about that. So, from my understanding... I mean, I would... definitely recommend you guys wait on tasking as opposed to buying service forms. And please correct me if I'm wrong, what I remembered was that was the goal, right? You guys wait on tasking instead of pulling the trigger on service forms. But from what I remember, you guys had like an urgent need for the output of the forms, which is what started the service forms conversation again.

JONATHAN

2:44 Because because in the tasking introductory meeting, they said they would not be producing any customer facing information until four quarter of 24, I believe or maybe.

JUANITA

2:59 Next year, I don't know exactly when, but definitely some at some point next year, right? Yes, that's correct.

JONATHAN

3:07 So, we were hoping to have something sooner than that, but we think, you know, we've limp along this far just using the service link tickets. We've had our accounting department send out the service link in PDF form along with the invoice. And that seems to be helping. We're also going to be implementing work order authorizations for the text so they get customer sign off on site. So we're hoping that will help as well. And then I've been in my free time all the lovely free time I have pushing my way through the service trade certification courses to make sure we're not missing anything. So been dabbling with the paperwork available there for startup forms and things like that. So... unless than, you know, there's a major shift in the price point on service forms. Again, it's the same conversation we had was it may or June. We don't feel like 50 dollars per tech per month as well.

JUANITA

4:09 Yeah. So.

JONATHAN

4:12 So, I mean, I hesitate to tell you, what an agreeable price point would be, but it's not 50.

JUANITA

4:20 Right. I think the last time we talked about is you mentioned me like I don't know 10 dollars a license correctly, 12.

JONATHAN

4:28 Service forms feels like something that your competitors offer or something similar build up certain the big and typing something similar to it. So it just feels like something that should be included in the 2,200 protect we pay per year or the 2,300 protect we pay per year. I'm not quite sure, I don't quite remember, but it just seems like a steep add on with very little benefit.

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JUANITA

4:58 Yeah. And, I would agree. And, you know, that's a big part of why tasking is coming and why it won't be like an add on to you. And although my job is to sell you stuff... all jokes aside. I personally would feel better if you did not purchase service forms because it being a subscription like I, I'm in it for like long term, right? Like I want you to have something long term, not, you're going to get rid of it the following year, right? Like I'm not the one to like make a quick sale just for the heck of it, right? So I would personally prefer you guys to not purchase service forms if you can wait on tasking?

JONATHAN

5:43 Yeah.

JUANITA

5:44 Then that would be the best path forward, right? Yeah. And that's what I've been telling all my mechanical customers who ask me about service forms. I'm like, hey, heads up like this is coming. I suggest you wait unless there's a dire need or like an urgent like matter in which you need this like a sap, which I thought was the case with you all as well. I was just went why we went down this path. But if you guys can, sorry, my dogs are fighting in the background, I don't know if you can hear them. Okay, good. If, yeah, like you said, you've been, you know, doing what you, what you've been currently doing and you're just fine, if you can continue doing that until tasking comes out. I think that's the best option for you guys.

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JONATHAN

6:32 Yeah. And, and it's strange. I got a very different message from the executive leadership at the very beginning of the summer was, hey, we need this now and the end of the summer, it's like, well, that was okay.

JUANITA

6:46 Yeah, I get it. I understand. But the reason I'm also saying this is because I doubt Billy would, I just don't know how much how low we can go on those licenses and I don't foresee it being enough for you guys to feel comfortable moving forward.

JONATHAN

7:10 I wouldn't even, I wouldn't bother bringing it up to Billy honestly. I would just make sure that you're okay, still authorized to offer that discount on the asset conversion because that is something we'd still like to do. So as long as we're green light on that asset conversion price even without the commitment to service forms we'd like to move forward on that. I get you a payment cut as soon as you get me that, okay, that we're still good on that. So.

JUANITA

7:39 That was the 596, correct? That's the one you're referencing?

JONATHAN

7:44 I thought it was 1,600 for the assets or maybe it was 1,600 for onboarding plus assets.

JUANITA

7:53 Let's see. So the 1,600 was for onboarding the 1,600 would have covered. If you did service forms, it would have covered onboarding the custom forms and part of the asset conversion. But if you guys are only doing the asset conversion, that's gonna be, I think less than 600 dollars.

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JONATHAN

8:23 Okay. Because we went the easy route on that.

JUANITA

8:26 Yeah.

JONATHAN

8:28 Well, that's well within my authority. So, you've kind of it. If that's the price, you know, how?

JUANITA

8:36 596.

JONATHAN

8:38 Okay. Yeah, definitely want that then.

JUANITA

8:42 Okay. I actually just spoke to the data team and earlier today, they said they got everything ready. They're gonna test it in like a sandbox account before deploying it into production, but it's pretty much already done.

JONATHAN

8:57 Excellent.

JUANITA

8:59 Okay.

JUANITA

9:07 Yeah. Okay. All right. Aside of service forms, anything else I can help with any other projects, things you're working on? I think I saw something from Andrew.

JONATHAN

9:23 Yeah, he's working on revamping our sales data output... and then just those two items that I emailed to you.

JUANITA

9:33 Yes, thank you for the reminder. Yes, the sales roles and invoicing, which I'm still digging into. I actually have a large block of time tomorrow to dedicate specifically to that just because last week was insanity, but yes, I will get back to you on that as well.

JONATHAN

9:51 Yeah, we just figure we'll send you the, whatever recommendations we can think of. And if they're good hit and yeah, if they're not, then that's fine. We're fine. So.

JUANITA

10:03 Yeah. Always happy to put eyes on, you know, whatever questions that you all have as well as Andrew, you know, we're the two that can help with those types of things.

JONATHAN

10:14 Yeah. The only other frustration that we've got that keeps popping up on our end is the ability for helpers to enter comments. Don't care about efficiencies, don't care about items, don't care about anything else. I just want helpers to be able to enter comment.

JUANITA

10:31 Funny. You mentioned that last week, we, as the account management team had a meeting with the product and they were like, hey guys, what is like some common feedback you guys are hearing relating to helpers, and all I said job comments. And then within a few minutes, like the rest of the am team, yep job comments, adding job comments, like we have to let them add job comments. So we're talking about it and we're definitely pushing for it. So I will update with more information as soon as I can. But yes, I feel you 100 percent and agree that.

JONATHAN

11:08 Yeah, I mean, it makes sense for the technicians for the actual technicians to be limited to the deficiencies and adding attachments and stuff like that that's perfectly,

all right. But the comments is killing us, right? Well, do we fit this person as a technician? Yeah, but they don't know much so.

JUANITA

11:27 Right. And I think, the technical reason behind that to begin with was, you know, customers would find a way to like add deficiencies in the comments when they're not really supposed to. But then another one of my colleagues brought up that well, you know, although we're limiting helpers to not add job comments. I've got a customer that because helpers are allowed to upload pictures, they have like color coded and like in notes like one is red, one is yellow. I forget the other color, but like that's how they take, they like hand write the deficiency on the sticky note and snap it to upload the service straight. So that's like they're getting away with adding deficiencies as a helper... and we're all like, you know, what people are creative, like they're gonna like cheat the system regardless, like just let them add comments please.

JONATHAN

12:29 It, so that's crazy. So, and then, I mean, you probably got a whole office person dedicated to just entering the deficiencies based on those comments or those attachments.

JUANITA

12:40 Yeah, it's like at that point, you guys are just doing so much like just get the tech license because, and, it's a fire company too. So it's like helpers like legally cannot add efficiencies because they're not like certified to do so. So. Yeah, that was a funny story from last week, but yes, let me write that down job comments. So I can just keep you up to date on kind of what gets decided.

JONATHAN

13:08 That's funny. Yeah. So the feedback from the new customers or the potential customers that we talked to one was waiting to see the software in person but appreciate it as talking to them. And the other one thought for sure that she was gonna go with service trade. She was, she had concerns about it being a add on or Bolton heavy software like, but I made it perfectly clear that the baseline software could accomplish everything they needed to do so.

JUANITA

13:41 From, from the reference calls, yeah. Okay. Cool. Yeah, no, thank you so much for doing that.

JONATHAN

13:49 We'd love to know what our scorecard is.

JUANITA

13:52 So, gosh, I, well, actually, I'm curious to know myself. The only one I've heard about.

JONATHAN

14:03 I don't know. I've lost his.

JUANITA

14:06 Okay. Yeah. So say, the only one I've heard is about, Tim.

--- *Wrap-up* ---

JONATHAN

14:11 Yeah, I know we're over one there.

JUANITA

14:13 They...

JONATHAN

14:15 Won't move BuildOps anyways.

JUANITA

14:18 That's so funny. I think it was Billy telling me about that. No, it was my boss skip, he told me that, you know, it was over one. So far. I was like, wait a minute. Who did they talk to? He was like Tim Anderson. I was like, why did you tell them to talk to Tim Anderson? I was like Jonathan is the most hands on with service like he knows the day to day, right? I just assume Tim maybe like knows a high level, right? So maybe not as much as you like as a daily user. Yeah, that's the only one I know of. So I also am curious to know your scorecard.

--- *Wrap-up ends* ---

JONATHAN

14:55 Me too. Yeah. Tim's good for the executive level overview, but he doesn't know the system doesn't work with it on a regular basis. So now, so the two meetings that I've had, Dave was in one of them and I was so for the other ones.

JUANITA

15:13 Okay. Well, since you guys didn't use your smoking hot discount as Billy mentioned, unlike the whole service for thing, I mean, I would say just keep it in mind for future stuff because you are taking the reference calls, right? Yes.

--- *Pricing* ---

JONATHAN

15:30 Yeah, we'll just bank the good favor for now.

JUANITA

15:35 I say make sure, you get use out of it at some point.

JONATHAN

15:40 So don't worry renewals coming up in may.

JUANITA

15:42 Yeah, it sure is.

JONATHAN

15:46 Only renewed us for a year despite my push for three.

JUANITA

15:51 Right. Yeah.

JONATHAN

15:53 I'm already, so Dave has more control of the budget than I did when I was in operations. So hopefully I'll be able to push him to do a multi year.

JUANITA

16:04 Correct. Okay. So.

JONATHAN

16:08 I don't want the headache of switching. I really don't because it would all fall on me. I've been down that road. Don't want to do it again.

JUANITA

16:16 Yeah. Let's see what. There is something else I was just gonna mention to you. What was it about? It'll? Come to me? Maybe it was about BuildOps. I can't remember.

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JONATHAN

16:33 You'll hang up and go that's right?

JUANITA

16:36 Yeah, I think it was just more so something funny that was recently mentioned that BuildOps was like telling people about. And so it got back to us and really what that's fine. It'll come to me. Maybe it's really not that important anyway. All right. So, I'll let, Benny, Billy know about the service forms decision, which the whole time I was hoping that, you know, would, it wouldn't really happen like I want you guys to first and foremost, be tasking so you guys can see how that will work for you. So I'll let Billy know about that. I'll review the two items that you emailed me about invoicing and sales users, the third helpers and job can.

JONATHAN

17:31 Yep. And then did you have any date updates on when they're gonna do that homepage revamp? They sent out advertisement advertising material on it and, said it was coming summer of 2023...

JUANITA

17:52 The summer release? Yeah, I was actually looking at that earlier because I was telling the customer about it, in looking at the documentation, summer release 2023 kind of sets the expectation of, hey, this is coming out summer of 2023 but I did meet with Ryan hard last week who is over product and asked him about when those calls are going to be happening as far as like the early adopter for those specific set of features. And he said it's coming within the next couple of weeks if he hasn't already reached out to you already. You haven't seen anything from Ryan hard? Okay?

JONATHAN

18:40 No, not yet. The like the homepage revamp and stuff like that. So, one of the review calls said that one of the potential buyers said service trade look dated and I said, yeah, it does now, but they've got a whole, you know, revamp in the works and I just was curious if you had a date on it?

JUANITA

19:04 Yeah, I don't because that's part of the early adopter program like the, so that will entail the tasking but also like a revamped scheduling and dispatch boards as well as like the main service trade dashboard.

JONATHAN

19:24 Yeah. That's what we were looking for as those updates to the main page and the dispatch board because it looks really nice.

JUANITA

19:30 Yeah, I'll just ping rinfard again this week and get like more solidified information as far as dates because I also have other customers asking as well.

JONATHAN

19:43 Appreciate any updates then.

JUANITA

19:46 Sure.

JONATHAN

19:48 That's all I got.

JUANITA

19:51 Awesome. So, I will stay in touch with you Jonathan, and other than that, yeah,
just reach out if you think of anything else, but I'll let you get back to it.

JONATHAN

20:01 I appreciate it all.

JUANITA

20:02 Right. Thank you. Bye.

The End