Kirby, Anna, & Brooke Debrief

Brooke Caskey with Power Pros Electrical Ltd.
Recorded on 3/9/23 via Zoom, 28 min.

Participants

SERVICETRADE

Brooke Caskey
Territory Manager

Anna McMahon
VP of Inside Sales

POWER PROS ELECTRICAL LTD.

Kirby Sewell
President

Topics

Transcript

BROOKE

0:03 I actually can make sure that... so do.

BROOKE

0:18 Picking it up.

BROOKE

0:31 Is this logged in it is?

BROOKE

0:43 No.

BROOKE

1:04 I'll just put my camera on if you want to keep the audio.

BROOKE

1:29 In the one?

BROOKE

1:39 There it is.

BROOKE

1:49 Try to take the floor off.

BROOKE

2:01 He just entered the room. I don't know where I look here here or he.

BROOKE

2:10 Okay. And you put the thing up there? So we like look at Kirby. Yes. Okay. There we go.

BROOKE

2:44 Let me turn you up... hey, carb her.

KIRBY

2:50 I can hear you just fine.

BROOKE

2:51 Perfect.

KIRBY

2:52 How are you? Good. How are you two doing?

BROOKE

2:56 I'm doing well, good.

KIRBY

2:59 Good. So... and I guess, you know, we've gone with BuildOps.

BROOKE

3:11 Yeah, Brooke told me a little bit about your conversation and I suspected that might be the case or you guys were at very least evaluating BuildOps a little bit more when we didn't hear back from you, but I appreciate you taking the time to give us a little bit more insight on that decision and kind of what went into kind of leaning towards their direction.

KIRBY

3:39 So, are you both familiar with BuildOps? Have you seen their program?

BROOKE

3:45 We have, and I know some... I'm familiar with them? I'm familiar with some of their strings. I'm familiar with some of the concerns that people have had or expressed to us. I think we mentioned, I mentioned on the call with Cody that they started in mechanical and hvac which we have kinda developed in.

--- Type of work ---

BROOKE

4:17 I was a little bit surprised that you guys decided to go in that direction just because of the amount of maintenance agreements that you guys are doing because they are a little bit more on the project side than the recurring service and maintenance side. So a lot of times if we, because that's where we specialize if I'm talking to like my father's electrical contractor and he does all installations.

--- Type of work ends ---

BROOKE

4:50 He doesn't do any service, and that's typically more the profile that I would actually say BuildOps is probably a better fit for. So that was a little bit of surprise. Brooke mentioned that reporting had a lot to do with it. I would love to kind of have you elaborate with that. I know that was part of our conversation around the in at reporting versus the BI functionality that's kind of our strategic focus or the strategic direction that we met with reporting, but I would love to hear from your perspective, so.

KIRBY

5:31 Yeah. When... we were, you know, we had lots of conversations with you guys and this is again why I said to Brooke I'd love to give you the reasoning why we went with BuildOps.

--- *Purchase decision* ---

KIRBY

5:46 I think you've earned that... the BuildOps and we put them through. You know, we had numerous calls with them like we did with you guys. But it was kind of... after Cody brought BuildOps to the table, I looked at the demo, they did a presentation and then I think they did four more presentations that week that we kinda... we were basically ready to sign on with you guys.

--- *Purchase decision ends* ---

KIRBY

6:25 And then we had them demo their program in many different ways. And we really dug into, we really dug into the reporting side of things which is what we were, what we found was missing from service trades... program itself. I know that when we talked, you know, you guys there was the opportunity to do and I'm gonna be very careful with this if it's rating or not. But third party reporting is what we felt we were gonna have to get involved with. On your end, we, I have to basically like a application to pull reports out... the BI side of things. Whereas BuildOps, it's all internal meaning that when we train our, when we have our team working on that program, they don't have to, they don't have to go elsewhere to find the reporting. And what really caught our attention with the BuildOps side of things was the way you could drill down into certain client like preventative maintenance or property managers, or we could really compile... we could, what we had the ability to do with them was we could start to talk and pull all our preventative maintenance clients into one location and we could have those, we could have those clients listed and we could see who we were, you know, being let's say profitable with or who is paying your invoices on time? And that's gonna serve our team here really well because we just don't have that right now. Service management can get our technicians out on the road. But we have very limited reporting. And this, that was probably the big one that swung us over to build off was their reporting capabilities. I don't know where you saw the reporting capabilities last. But... they are, as they improve their program through the likes of using their clients, you know, their clients come back with something that they need, I need. And then they add that onto their program and that goes out to everybody.

--- *Pricing* ---

8:52 So it was just, that was the big one. The other one that we really liked is it's just it's one cost there's no add ons. So we pay a flat fee per month and we get to use the whole program... and if they improve the program, we get the use of that as well. There's no additional fees.

--- Pricing ends ---

BROOKE

9:15 Yeah. I know that was the big piece that Cody mentioned on our last call... and, you know, I'll just reiterate, you know, I think our strategy has been a little bit different in terms of a lot of the things that we do. One we ultimately don't believe in kind of the all in one kind of mentality, right? Because it's like saying there's going to be one app on your phone, right? Is there's different areas of the business that need different things, and some businesses need more attention in that area, right? So even the reporting piece you're right? Our, you know, our core strategy is to provide you a data warehouse.

--- Customer engagement ---

BROOKE

10:03 But the benefit of that is that you can pull from other technology that you're using to, at reporting in the whole like from a holistic view in your business, not all companies that we talk to are in a place, which is why reporting within service trade is a priority for this year.

--- Customer engagement ends ---

BROOKE

10:23 But when we started developing on our reporting capabilities, that's ultimately the direction that we strategically went because, you know, you might wanna pull data from service trade from things like pro core from your accounting system and being able to see reporting holistically, right? We ourselves have a BI to we don't use quick site personally. We use another kind of... data analytics tool that we pull from our accounting system from Salesforce from another technology that our customer success team use this so that we can see holistically across the business, right? But as I mentioned, I so appreciate you kind of explaining what reporting was valuable?

--- Type of work ---

BROOKE

11:18 Because that is something that's top of mind for us. So it sounds like being able to see across all of your agreements. But you said something really interesting that I hadn't heard before. It sounded like type of client tell was one way you could cut that kind of information to see if property managers were, you know, the profitability with maintenance agreements with property managers was better or worse than if you were working with hospitals and things of that nature. I did, I understand that correctly?

KIRBY

11:57 Yeah. So, well, let's jump back a little bit. So we have, and we will be going to Sage intact down the road. We know that. But right now, on a high level view, I get to see the reporting from each department through Sage 300. So there's essentially four businesses running under the umbrella of Sage 300. And I can go in and see each one of those businesses on a high level view. I look at their financials monthly.

BROOKE

12:27 So...

KIRBY

12:27 That's Sage intact, pro core... offers reporting just for the projects team. Anybody using pro core, we can see how we're doing and let's just use. Let's just say, you know, one project, we can go into one project that we're working on and we can pull the reporting out of pro core and that all that information gets dumped into Sage 300, which I look at, but it's the team is the project team that can see how their jobs are doing, how their clients are doing through pro core.

BROOKE

13:04 Yes, yes.

KIRBY

13:05 The reason we went with BuildOps is because it's the same idea as pro core is BuildOps offers all the service team, their reporting under that one umbrella.

BROOKE

13:17 Absolutely.

KIRBY

13:19 That was, that was the key. The programs are very similar in taste. They get the, you know, the, to dispatch and to track where vans are. And, you know, see what's on like on the boots on the ground type of level. They're both very similar. But we didn't want to add another... piece onto the puzzle... where when in fact, I can just have my team working out of BuildOps... I don't know if that makes sense or not.

BROOKE

13:54 No, it absolutely does make sense, right? Because I think too for your service... with your service operations team, you want them to see it in their system, right? And I know that is something that they currently have an advantage on. And as I mentioned, that's a huge priority for us this year. Yeah, our reporting strategy ultimately started so that, you know, similar to how you guys are currently doing it, where the pro core information feeds into your accounting system so that, you know, you and Cody can see the business as a whole.

KIRBY

14:37 That's right?

BROOKE

14:38 A lot of our other customers when it came to their reporting means they had a similar strategy. But what they found was that made it really restrictive on who could see... the business metrics especially if there was things across departments that they wanted to see. And that's why we went with the data warehouse first because that was the problem our customers were asking us to solve. And so now we are going back and saying, okay, we've solved that problem so that we're getting a lot of the business high level reporting for ownership outside of the accounting system, so that you can see a holistic view. Now, we're going back for the ap, but I definitely understand you want your service team to be able to visualize the information that they, that they are specifically responsible for without having to have the extra list of having a business intelligence tool, right?

KIRBY

15:44 Right.

BROOKE

15:46 I definitely understand that, right? That's one area. I think I mentioned, I was explicit with you and Cody that's one area that I think is a weakness for us, that is a priority because... we went with the strategy or our initial strategy started with reporting. Let's give you the ability to see all of your data combined with anything else that you're looking at holistically in. We're very much. We're part of an, you know, we're an ecosystem, right? We're not the end all deal. And that's part of the reason why we said, hey, we want to give everyone the ability to extract that data. And now we're coming to a point where, hey, we want it visualize within the system, right?

--- Type of work ---

KIRBY

16:41 Right, exactly.

BROOKE

16:43 So, you know, I think you guys are kind of in that space. Most of our smaller companies don't have any desire to have, you know, business intelligence reporting. I think you guys are kind of in that in between space where you're probably not there yet... that's more work than you want at this point for what you need for the service department, so.

--- Type of work ends ---

KIRBY

17:08 That's right?

BROOKE

17:09 I definitely understand that, right? I think in a couple of years with all the plans that you guys mentioned in terms of your growth plans, that might ultimately change. But I definitely understand the, that being a big factor in your decision... there's two things just because, you know, I mentioned when you said that you had a poor experience with your expectation with SSO. I think I mentioned, unfortunately, I've I hear that all the time with technology. One thing I think your team mentioned to Brooke that was gonna really help you with your strategy that you liked it about us is the ability to optimize on your pull through revenue. That is one area if you did not kind of see what that process was like with BuildOps that we have heard... is a struggle. So that's just something that I would be conscious of. And the other place that I heard mixed reviews is the ability to get onboarded. So, you know, one thing, you know, one thing that I would recommend is if you haven't already, I don't know if you guys have already signed and come up with your terms... I would probably negotiate something in terms of your, you know, your payments to be secured so that it's tied with your onboarding.

KIRBY

18:50 Yes. And we did that.

BROOKE

18:53 Good, good.

KIRBY

18:54 We're we're yeah, we were, we basically, it's we need the proof, we need the proof then you get your payment and that's how we're moving forward with it. Yeah.

--- Purchase decision ---

BROOKE

19:06 Yeah. Okay. Good. Because I know Brooke did mention that you did speak with a reference, which I think is what I recommended after our last call, but we've had a couple of people, right? The reporting thing I have heard, right? And that's why I was being transparent when I knew you guys were looking at that because I think I didn't shy away from the fact that hey, this is an area that's you know, I'm very passionate about... the ability to have the data warehouse has been very valuable for the companies who are already going towards a business intelligent tool.

--- Purchase decision ends ---

BROOKE

19:44 But it's harder for like my small business team, those customers, you know, they don't have the muscle in their business to have really business intelligent reporting, right? I think you guys are kind of on the test and, but I have had customers who have ultimately, for similar reasons chosen BuildOps and they've come back to us because of struggles during the implementation. So I just wanted to make sure that you guys were protecting yourself just because I could feel the pain in your voice talking about your experience with SSO.

KIRBY

20:22 So, because, yeah, because I, you know, I've gone to the school of hard knocks and I've been dealing with SS over the years. We did put some, we put some protection in place on our end to cover our butts here in case it doesn't go well. The, you are working on the reporting and what, you know, Cody and I had a discussion if it doesn't go well with BuildOps, you know, we're not tied to them for the rest of our lives or we're not tied to anybody for the rest of our lives. The, that was the, that was the, that was the key component that you guys and you. And again, yes, you gave us fair warning that you're working on that, but, you know, we have to get, we have, we had to move, we needed to move forward with something because our service team is challenged right now. But we also, you know, we, you know, Cody and I both said, you know, if when you guys get your reporting in place... we can always reach back out to you. If it's not going well with Bill, do that's the way we look at?

BROOKE

21:42 Yeah. And you know, I think that I'm glad that you guys protected yourself 100 percent plan on keeping in touch, right? What can I ask? Is there any other, you know, I think we have some of our top kind of reports that were reporting our visibility that we are prioritizing. Is there any other critical? Not just, you know, I'm not asking in the frame of kind of what you saw with BuildOps, but more from the framework of, you know, Power pros like the really critical piece is that you see in your service business that you have to be able to see, right?

--- Customer engagement ---

BROOKE

22:24 Because we get some variation. There's some metrics that, you know, we think are really interesting that we've seen across all of our various commercial contractors like revenue per technician revenue per day that not everyone asks us for, but we want to include because we have that business intelligence within the system. But any other critical kind of reporting or visibility that would be important to your service department and it's growth?

--- Customer engagement ends ---

KIRBY

22:57 My gosh.

KIRBY

23:03 Yeah. And that question sends my mind in a 1,000,000 different directions. There's because everybody on the team like and just to, if I haven't made it clear, I can have my service team look at their client tell within side their program, all the reporting and they can have their, they can see how a Van tech is doing.

--- Quoting ---

KIRBY

23:31 They can see how a client is doing. They can see what's been invoiced or what hasn't been invoiced. They can see what quotes been approved, what hasn't been approved. I mean, there's you know, we've got a small group but a very diversified group with inside the service from and the, and what we found was the reporting gave each individual... their required reporting needs.

--- Quoting ends ---

KIRBY

24:00 So it was very vast. The one thing I found with BuildOps, it was a very vast reporting system like when we challenge to drill down, you know, yeah... gosh. So many variables. Yeah. How's the service fan technician doing? How many hours is spending on jobs?

--- Tech time tracking ---

KIRBY

24:22 Their calendar was super strong. So we could pick up hours. So the, you know, the hours worked reporting was very strong which was needed for our, the Gal that takes care of all the time sheets at the end of the week... the reporting on clients or some clients, you know, do we just have to simply let some clients go?

--- Type of work ---

KIRBY

24:46 Because they're asking to, you know, they're asking too much of us and we're not making any money with them. Yep... do we want to continue with preventative maintenance? Well, we could drill down, we could do an overview of all the preventative maintenance clients that we have, and we could decide whether or not we even want to pursue preventative maintenance or if we want to pursue property managers, like is, you know, for making, if we're making let's say 10 percent profit and on let's say... in the ev sector. And we're only making two percent profit on property managers. Will that's where we're going to focus our attention? But we are an extremely diversified company. And I, you know, from 22 years ago, whatever it's been now, that was always the plan. So we would be recession proof and we would be, you know, if projects was strong, we could lean on projects over service.

--- Type of work ends ---

KIRBY

25:40 It just gave us. It showed well that... we could pull any report we needed on the financial side of things on the technician side of things through their reporting.

KIRBY

26:02 Program if you wanna call it that their capabilities, their reporting capabilities, it was extremely vast. I can't just say, you know, one Shane over the other because they all proved very important to us.

BROOKE

26:15 Okay.

                          KIRBY

26:16 Interesting.

                          BROOKE

26:17 Yeah.

                          KIRBY

26:18 No.

                          BROOKE

26:19 I appreciate the insight and the feedback and, you know, I generally wish you
the best of luck, right? I.

                          KIRBY

26:26 Thank you.

                          BROOKE

26:26 Looking forward to working with you, but I know you and Brooke spent time
together and, you know, I think your company is very interesting. I think you, we
have a lot of the same mindset in terms of what's you know, what's important to the
business. So, you know, I generally believe, you know, I generally mean, you know,
we wish you the best of luck. We will keep in touch. I would love to hear how it goes.
And in terms of your, you know, just your long term growth, right? Because I think
we, you know, part of the reason I've been at service trade for so long is... like helping
companies grow, right? Growing companies are fund companies. So I love to keep.

                          KIRBY

27:10 Absolutely. I'm shocked for having this conversation. I thought for sure it would
be broken with you guys right now. So... let's go from there. I do appreciate your time
in Brooke. You're wonderful. You're fantastic and very diligent. And hey, we never
know what the future brings, right?

                          BROOKE

27:30 Sure. Thank you. That's any other feedback that you could that you have for us?

                          KIRBY

27:37 No, like I say, we were so close, we were so so close and I think we all know in
the room, it was the reporting side of things... that one us over to the other side and
you guys are working on that. So now you're doing a great job.

                          BROOKE

27:53 Awesome. Well, I appreciate your time care.

KIRBY

27:56 Okay. Thank you, ladies. Take care.

BROOKE

27:58 Talk to you soon. Bye.

KIRBY

27:59 Bye bye.

The End