



John, Michelle, Steve & Harrison | Meeting

Harrison Miller with Fire Sentry Systems Inc
Recorded on 8/31/23 via Zoom, 21 min.

Participants

SERVICETRADE

Harrison Miller
Territory Manager

FIRE SENTRY SYSTEMS INC

John Siewert
Operations Manager

Topics

<i>Type of work</i>	1:19
<i>Access to information</i>	2:45
<i>Access to information</i>	4:13
<i>Access to information</i>	4:51
<i>Pricing</i>	6:33
<i>Implementation and ongoing support</i>	7:45
<i>Pricing</i>	8:12
<i>Implementation and ongoing support</i>	8:47
<i>Accounting integrations</i>	10:29
<i>Implementation and ongoing support</i>	10:50
<i>Implementation and ongoing support</i>	12:07
<i>Purchase decision</i>	12:55
<i>Implementation and ongoing support</i>	15:10
<i>Purchase decision</i>	16:51
<i>Implementation and ongoing support</i>	17:10
<i>Pricing</i>	17:50
<i>Implementation and ongoing support</i>	18:59
<i>Purchase decision</i>	20:27

Transcript

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HARRISON

0:00 Hey...

JOHN

0:00 Harrison...

HARRISON

0:01 How are you guys doing today? All right?

JOHN

0:05 A little bit of maybe improcty on our part.

HARRISON

0:13 It is, it is all good. You're here now, so that's all that matters. You guys having a good week?

JOHN

0:21 Yeah, it's been a busy week but.

HARRISON

0:23 Yeah... yeah.

JOHN

0:25 Pretty well.

HARRISON

0:26 We're starting to get there's. A hurricane in Florida and it's starting to come up the cost. So we've been getting hit, really hard this week. So... yeah, it's poor, right? It's been a good excuse for me to get off work and sit on the couch the rest of the day so I can't complain. I'm a few years late but I just started watching game with Ron. I don't know if you have ever seen that or not, but started watching it and I'm absolutely hooked on it. So I really not complaining.

JOHN

0:57 Maybe we need a hurricane around. It'll be right, right, and take one right now.

HARRISON

1:03 But, yeah, cool. I mean, I really just kinda wanted to schedule this and I know there's been a lot of information to you guys, you know, the past couple of weeks and stuff. So, you know, definitely use time this as a time to decompress and just kinda gather your thoughts.

--- *Type of work* ---

HARRISON

1:19 I'm sure there's a 1,000,000 questions about, you know, everything that's been said. So wanted to take some time to fill those as well. How did that project management webinar go yesterday?

JOHN

1:30 I really like it. You know, we've kinda compared a couple of different softwares and build off being one of those and some of the things that we needed, from the software, you know, service trade has the functionality, and the other softwares. Haven't so especially on the Construction management side... I really like that.

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

HARRISON

1:58 Good. Are, are you guys still actively looking at got? Ops?

JOHN

2:03 Yeah. So pretty much between you guys, and BuildOps, or what we're whittling it down to?

HARRISON

2:10 Okay. Yeah. We're we're pretty familiar with BuildOps over here especially so, you know, I know I've mentioned it before but... we do fire and mechanical, you know, BuildOps came around I guess a few years back and they're kind of more on the mechanical side. I think maybe the last year or so they've been trying to break more into the fire and life safety side, kinda trying to take up that market. So I don't hear about them quite as much on the fire, but I am pretty familiar with them on the, you know, mechanical side of things.

--- *Access to information* ---

HARRISON

2:45 And... yeah, so so definitely glad that, you know, that went well, you know, in terms of service trade as a whole, I mean, what other questions do you guys have? Or, you know, what else do you really need to see?

JOHN

2:59 We did have some questions. I guess one of the things that we liked about service trade is that the office folks aren't you know, the subscriptions and stuff aren't charged for office staff in regards to scheduling though. So like I'm office staff, but I also schedule myself for certain design projects or whatever. Does the fact that I'm an office person does that limit my ability to schedule me for things?

HARRISON

3:33 So, let me ask you this whenever you go out into the field. I mean, would you need, the mobile app for like the description of work or are you just scheduling yourself and going out?

--- Access to information ends ---

JOHN

3:46 It's pretty much just to block it out on the calendar. So it's not like I'm taking service calls or anything like that.

HARRISON

3:53 Yeah. I mean, that shouldn't be a problem, you know, whenever we go like to the scheduler or the dispatch board, you know, you can add your users to that kind of like what you would probably do honestly if you're not scheduling yourself like a service call is almost creating like a dummy job, so to speak, so we can block out this time.

--- Access to information ---

HARRISON

4:13 You know, everyone in the office knows that, you know, John's go in here for, you know, these days, but, you know, if you're not using the app, then obviously, you know, you wouldn't be able to see that stuff out in the field, right? But, you know, from the office, we can absolutely block that off for you.

--- Access to information ends ---

JOHN

4:29 Okay. All right. So it's not like I lose functionality in that respect.

JOHN

4:34 Right. But would the text be able to see it that's that was our question? We use it a lot for like vacation scheduling. So, they know kinda who's in charge of the office. If somebody's out, if I'm out, then they know to call JD or if JD is out, then they know to call me.

--- Access to information ---

JOHN

4:51 So we use the calendar kinda just for a heads up as to who's in the office and where they're at.

JOHN

4:59 What?

HARRISON

5:01 So whenever they're doing it now, is that, you know, like are the text view in that like through... kind of like an office view now, right? So, like, I mean, you're not using like a mobile app currently. So is that like on Google calendar kind of thing?

JOHN

5:19 Yeah, yup. Yeah. So everybody sees everybody... that scheduled.

HARRISON

5:27 Yeah. So I mean, and, I wouldn't really think that would be a problem either. And the reason why is because again, what we Bill based solely on the number of technicians. So anyone that wants to have an office license can have an office license, you know, the ServiceTrade mobile app itself. You can access like, the office you through there as well. So, you know, if you wanted them to have access to that information, you know, they could see the scheduler... you know, on like a monthly basis or, you know, a weekly basis however you wanted to. So they know, you know, hey, I'm not in the field. Now. Let me not call him or let me call him for, you know, the certain issue that I have.

--- Access to information ends ---

JOHN

6:07 Okay. Good deal. Is the pricing that's listed on the website? Is that pretty much fixed pricing? Is there... you know, with higher numbers of users or anything like that? Is there any discounts or adjustments?

HARRISON

6:26 Yeah. Let me share my screen with you real quick because I actually created a quote... you know, kind O, just over our basic pricing is gonna be what you saw on the website.

--- Pricing ---

HARRISON

6:39 So this is what it's gonna look like right here. I would recommend you guys for that premium one because it is gonna cover that project management aspect of it. So it's going to be 139 dollars a month per technician. And then we do have a one time setup fee of about 3,500 bucks. So you'd be looking at annually about 15,000 and then the 3,500 for the one time charges. So about 18, 1,850 your first year and about 15,000 for recurring. That's our standard pricing.

--- Pricing ends ---

HARRISON

7:14 You know, I don't want pricing to be the reason why you decide not to go with service rate. If it's a functionality feature, you know, that's fine. You gotta do what's best for you. But, you know, if you feel like service that the best fit for you guys. I don't want pricing to be the factor and we'd be more than willing, to work with pricing, you know, whenever it comes time to it, I don't have a specific number that I can give you just know I can, you know, talk with some higher ups and figure something out.

--- Implementation and ongoing support ---

JOHN

7:45 Sounds good.

JOHN

7:52 A name was our other?

JOHN

7:55 Yeah. So kind of, the onboarding process, getting some training to our guys are going to be using the apps and then getting training to us that will be managing, the software, how I guess what's the process and how that rolls out.

--- Pricing ---

HARRISON

8:12 Yeah. So onboarding is something that I think we do a really good job of. We have a 97 percent retention rate. And I think a big reason why people don't you know, renew with their provider in the first place. It's just because they never really get set up, right?

--- Pricing ends ---

HARRISON

8:29 So I think that's a big reason why ours is, you know, as high as it is. So actually this is on our website and it's going to outline it perfectly. This is, I'll send you both over this link right here, but kinda just walk in through onboarding. So pretty much what's gonna happen is, you know, if you go forward with service trade, sign the contract.

--- Implementation and ongoing support ---

HARRISON

8:47 The first thing that's gonna happen is we're going to get you set up with our onboarding and implementation team. So send you a e-mail get you set up with

them. You'll also be assigned a project manager and essentially what that person's gonna be is like a coach for, you know, best practices for using ServiceTrade from the best practices, you know, from using it in the office. So you'll be assigned them. You'll have your kickoff call, you know, with that implementation team, it'll be about 30 minutes a couple, probably a week or so before your onboarding actually starts to, you know, you'll meet with them, kinda figure out what your goals are, what your data is looking like, things like that. You know, what do we need to do? What do you guys need to do in the meantime? You know, while we're waiting for onboarding to start, you know, to prep all that data, then you'll have your kickoff call. So during this time, it's we're gonna schedule out weekly meetings with that project manager. You know, again we want you guys to be able to hit the ground right? With this, use this as efficiently as possible. Discuss your data. Also what we're gonna do as well is we're gonna enroll the office and tech missions into our certification courses. Really really helpful. I had to take these whenever I started at service trade. But essentially what these, are self paced kind of modules or assignments. You know, you can go back and do them as many times as you want to. But super helpful. So that's another resource outside of that project management. You know, again, we're going to get all this data together, you know, import this into ServiceTrade where, you know, customers locations, pricing, you know, asset things like that.

--- Accounting integrations ---

HARRISON

10:29 You know, you have your certification programs, you know, weekly calls with your project manager, any integrations. So, you know, the Quickbooks integration is native to service trade. So, you know, we don't really have to worry about that, but we'll get that Quickbooks integration set up for you. So you don't have to, you know, do anything on that on your end.

--- Implementation and ongoing support ---

HARRISON

10:50 Then we're going to review your data, make sure everything looks good. And then after that, you're gonna go ahead and go live after you go live a couple of things is, so your onboarding is we're gonna block off about 90 days for it. You know, some people finish out a lot sooner than that. It's really about what pace that you guys want to go, but we'll block off 90 days for it. After your onboarding is done. You know, you won't have access to the project manager anymore, but you also have 24 seven access to customer support. And then you'll also be assigned an account manager as well throughout your entire time. You working with service trade and, you know, they're really kinda used as a resource as well. Make sure, you know, your account help is good, and make sure you're using that, you know, any questions, anything like that. So, you know, it's kinda long winded, but, you know, definitely wanna say that you're going to be in good hands, you know, with service trade the whole time, you know, we're not gonna, you know, hand you the keys and tell you good luck, right? So you wanna make sure that you're using that.

--- Implementation and ongoing support ends ---

JOHN

11:47 Okay. Is through that 90 day process, you know, there's obviously a lot, to set up and prepare but is it pretty much a one day? We don't have it the next day we do, or is there kind of?

HARRISON

12:03 Yeah.

JOHN

12:04 I...

HARRISON

12:05 I know what you're trying to say. Yes.

--- Implementation and ongoing support ---

HARRISON

12:07 So, great question. Yes. So, you know, you bought service trade, we're not gonna wait, make you wait 90 days for you to start using it. You know, why you're paying for it. Doesn't really make sense. You'll be assigned kind a, like a demo account, you know, use quote on a like a demo account. So, you know, you can go ahead and go in and start scheduling jobs. You can start quoting, you know, you can start invoicing directly through there, you know, all while we're kind of getting, your account set up within ServiceTrade. So, you know, really whenever you purchase ServiceTrade, you can start using it, you know, you might need a little bit of coaching on really how to use it. But yeah, you can definitely go ahead and start using that cool. Yep.

--- Purchase decision ---

JOHN

12:55 We didn't have a very long list of questions... how?

HARRISON

13:02 You know, and we didn't talk about this too much earlier. But I mean, in terms of like software evaluations, I mean, what's typically the process for you guys? I mean, I know we've had a couple of meetings, you know, it seems at least in my opinion that it checks off a lot of boxes. I mean, what typically happens next?

JOHN

13:22 We've never done this before. We're learning as we go.

HARRISON

13:27 I sit...

JOHN

13:28 Down at my desk and watch some YouTube videos on how I'm gonna, you know, make some sort of spreadsheets. So... yeah, I guess this is the first time we really crossed this bridge.

HARRISON

13:43 Okay. Would there be anyone else that you think would want to see this or?

JOHN

13:51 We're the decision making team. So... no, I think just between the last couple... webinars and whatnot that we've had a chance to see the software... really definitely a benefit to us. There's so many things, that we're like my gosh, that solves that all different problems all in one shot. So.

HARRISON

14:23 Yeah. Well, and so, I know when we initially spoke... you know, you didn't really have a super set time line on when you wanted something set up. I know you talked with us. You talked with BuildOps. I mean, kinda through that process. You know, do you have a little better idea of when you wanted to get something set up?

JOHN

14:46 We, we've talked a little bit about it. Nothing set in stone, but Steve's out this week. He's he's sick and I think it's... kinda shown us a bit. Maybe we need to jump into this sooner than later to help alleviate some of those gaps that we have in Steve's gone. So.

--- Implementation and ongoing support ---

HARRISON

15:10 Okay. Well, let me here, I'll show you this as well. And I'll kind of explain the reasoning for it. So this is kind of what our onboarding schedule looks like. So we have different time slots on when we do onboarding. And the reason why is because, you know, we have limited time slots. And the reason why is because we don't want to overlook ourselves. So, you know, we don't want to sign up, you know, 15 companies at the beginning of, you know, October and then figure out, hey, we can't actually get these people onboarding, they're going to be onboarding for, you know, the next six months because we just don't have the resources for it. So we have a limited number of time slots, you guys would be looking at this one right here for the premium. So currently, we have two spots left for September fifteenth. Those are actually gonna go away tomorrow because we like to leave a two week, at least a two week gap, you know, just so you know, you guys have time to get your data ready. We have time, to get prepared. So I don't think that the 915 one is going to be realistic for you. You know, being out this week, the next one after that, we have three spots left for October first. Those are first come first. After that's gone, it's gonna move over to October fifteenth. So that's when the onboarding would actually start. And like I said, that would take about, you know, 90 days, you know, probably a little bit less, you know, just kinda depending on, you know, where you guys are, but, you know, those are the two dates I would probably keep in mind for the next upcoming is October first, October fifteenth.

--- Purchase decision ---

HARRISON

16:51 Okay. We're not a busy season for mechanical. So that's starting to pick back up. So they'll probably start to go a little bit faster, but, you know, just wanna kinda throw those dates out there to you.

JOHN

17:01 Okay. And kinda looking at our rough goal that we had in mind was to have something fully implemented by the first of the year, so.

--- Implementation and ongoing support ---

HARRISON

17:10 Yeah. I mean, I do October fifteenth, 90 days that's gonna have you pretty up and running, you know, beginning of the new year.

JOHN

17:19 Okay.

JOHN

17:26 Well, great.

JOHN

17:32 I don't know that we've got any other questions.

HARRISON

17:35 Okay. And in terms of just the standard pricing, I mean, in terms of what you're getting, I mean, do you think that price seems reasonable? I mean, what kind of work do I need to do on my end?

--- Pricing ---

JOHN

17:50 I mean, we take any help we can get... the sales guy that we're working with at BuildOps. He did, he gave us a spiff, it was like three months free. I think it worked out to about 3,000 bucks, something like that. So in their software is more expensive, but, with his discount, it brought it down pretty close to what the standard pricing is for you guys.

--- Pricing ends ---

HARRISON

18:19 Okay. That's good to know I got a quick question for you. Does he know that you guys are talking to service rate as well?

JOHN

18:26 I'm pretty sure I've mentioned it, so.

HARRISON

18:28 Okay. Because the BuildOps, you know, it is, it's really good software. They kind of play it on service trade sometimes especially on the mechanical space. They absolutely drag our name through the model a lot of times. So, I'm just kinda curious. I was actually kinda surprised once you said BuildOps still want to talk to us after.

JOHN

18:47 One of the things that I appreciate it about ServiceTrade is just having as much info including pricing as you guys do on the website.

--- Implementation and ongoing support ---

JOHN

18:59 There's been a ton of info that we will have a random question and the answer is just kinda right there. So.

HARRISON

19:06 Yeah. And I mean, you know, even obviously, you're going to have that 24 seven support. You're going to have your account manager, but, you know, even on your own, hang on, I'll show you this as well. You'll have the support page as well. So, I mean, pretty much any questions that you have, you can look on the support page as well and kinda figure it out. So, you know, if I had questions about, you know, quoting and I didn't feel like waiting, you know, reaching out to support, you know, we have all these articles about quoting.

--- Implementation and ongoing support ends ---

HARRISON

19:40 So, you know, creating and managing quotes, right? So, you know, I can click in here. It's gonna walk me through how to do all this stuff. So, you know, you even have these resources as well. So I want to keep you pretty informed. We update these constantly. We're always adding new stuff there.

JOHN

20:00 It's good save on a phone call and just kinda find or?

HARRISON

20:04 Exactly that's. I hate getting on the phone with a customer service. I always just you TAM stuff.

JOHN

20:10 Right.

HARRISON

20:14 Yeah. Anything else for me at this time?

JOHN

20:20 Nothing I can think, I think so I might send you an e-mail here in there if something pops up.

--- Purchase decision ---

HARRISON

20:27 Okay. That sounds good on my end. What I'll do is I can definitely work on pricing. I'm actually in the office today so I can figure some stuff out. Would you guys want to meet up again and run through that or, you know, because honestly, I just want to get on the same time frame as you guys. You know, I don't wanna, you know, schedule a lot of meetings for, you know, next week or the week after and you're looking to make a decision, you know, end of September or something like that. So you guys just let me know at what pace you wanna work, you know, when you wanna meet up again and, we can schedule from there.

--- Purchase decision ends ---

JOHN

21:04 That works.

HARRISON

21:07 Okay. Well, cool. Let me know if you have any questions, but yeah, we will, we'll talk soon.

JOHN

21:13 All right. Thanks so much. Thank you.

HARRISON

21:16 Have a good one.

The End