



# **ServiceTrade/Pueblo Mechanical Call**

Maribeth Steffen with Pueblo Mechanical & Controls Inc  
Recorded on 4/6/22 via Zoom, 10 min.

## **Participants**

### **SERVICETRADE**

Maribeth Steffen  
*Field Manager*

Lauren Rice  
*Director of Enterprise Sales*

### **PUEBLO MECHANICAL & CONTROLS INC**

Steve Kallan  
*Service Director*

# Topics

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# Transcript

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

MARIBETH

0:00 Okay.

LAUREN

0:00 Again, hello, you're wearing the same color shirt as Anna today. I'm all right. Yep. And then Jonathan... Jonathan awesome.

MARIBETH

0:12 We got, we, the memo went out. I guess.

LAUREN

0:15 They were like staring HR, you're not...

LAUREN

0:22 Fun...

MARIBETH

0:24 Hold here today. So, I've got this cater right next to me and... double layers.

LAUREN

0:34 It's not cold here. In fact, it's supposed to be up to 90 tomorrow. So, I took Thursday off the boat is finally running and we took it out this weekend. It was late cold. So, we are, I'm taking off tomorrow so we can enjoy the day... now that'll be good.

MARIBETH

1:02 Yeah. Where?

LAUREN

1:03 Are your call objectives?

MARIBETH

1:06 Yeah.

LAUREN

1:07 I saw you had something.

LAUREN

1:14 I'm just trying to pull up all my notes.

MARIBETH

1:17 Hi, they should be in your inbox?

LAUREN

1:19 Cool. We should ask. Can I have the golfing ones?

MARIBETH

1:25 Yeah, yeah. I was going to... I actually looked already to see how she performed. I think she was like 30 fifth. It was a 5,000,000 dollar purse.

LAUREN

1:40 That's wild.

MARIBETH

1:41 I know.

MARIBETH

1:53 So, Brian and job, they'll send me a second. It's probably better for them because they have a board meeting, I guess on the 26 perfect. So... I'm just gonna confirm that with Tory. And then I'll drop it on every with Brian said he wants to check and I'll let you know tomorrow bye.

LAUREN

2:07 Okay. That sounds good. Okay?

LAUREN

2:17 Have you gotten until we're at all yet?

MARIBETH

2:20 Hello?

LAUREN

2:22 Months fast. How?

MARIBETH

2:25 Sure. What you get like five yeses? Or something?

LAUREN

2:29 It's like six gases?

MARIBETH

2:31 Okay.

LAUREN

2:32 From word all to court all would just forward that once it's it is, and...

LAUREN

2:48 Yeah, I've already.

MARIBETH

2:49 Good at it. Are you, do you normally guess it?

LAUREN

2:53 Yeah, I do. I love work and it's like I always you simply like anagram slight, what words are inside this word and all that stuff. Yeah.

MARIBETH

3:05 Like...

LAUREN

3:05 This word jumbles like to figure out what the word is, the, this is right up my alley.

MARIBETH

3:11 Did you, did you ever get into sudoku?

LAUREN

3:14 I did, I like pseudo, who, if I stare at it long enough, I get headaches.

MARIBETH

3:20 Yeah. Here he comes.

LAUREN

3:22 Cool. It's not to say, should we call?

MARIBETH

3:35 Hey, Steve?

STEVE

3:39 Can you hear?

MARIBETH

3:40 I can now, how are you today doing?

STEVE

3:44 Hello. Good. Let me start the video. There. Sorry, a couple of technical difficulties.

MARIBETH

3:50 Par for the course.

STEVE

3:52 Yeah... we're right at one o'clock... I want to share some information with you. We've... we've made a decision and we're gonna go with BuildOps at this point but... but I want to share some information may maybe what the difference was in the feedback that I got from the team because we have a lot of mixed opinions. We laid out a lot of the things that service trade did. Well. I can tell you one of the big things that... that... that really worked well for you, it was the be enable to use service trade and pro court together at this point which BuildOps is in the process of doing themselves now, but it's not 100 percent based and you're ready to roll ready to go. Okay. Pricing was... was not an issue. Just... just so, you know, pricing was very equivalent on both sides. Right now. They... they... they have the implementation here in the office and your point was wall taken around as they grow and become larger and larger. They may run into some of the same challenges that service trade has with onsite personnel spending all the time in the implementation stage and the integration stage live at the customer site, right? Which is something I know you can do, but I know that as you grow, I think in the beginning, you guys had mentioned that in the beginning when you were smaller, you were able to spend a lot of time in the implementation stage. Probably the two biggest challenges for the team was the... the use of three different apps, right?

*--- Accounting integrations ---*

STEVE

5:37 So you've got service, prayed you've got parts ledger and you've got my Google reports, different applications that are used were BuildOps. It's all in one package to do it. There's not three different types of programs. And then from a field perspective, the... the largest one was the asset tool that they've got were using their cameras or fills the asset immediately right into the program.

*--- Accounting integrations ends ---*

STEVE

6:09 And they were able too exhibit that several times with us on data place that we're warm data place that we're really clean and the application seemed to work really

well. So those were the main points in the takeaways of the difference between the two. And it has nothing to do with pricing. You're very... very competitive that your references and their references were both very good. One of the references made a comment that it is a tremendous sales tool that they didn't use it on the administrative side of the business to do their billings. They use something else. But was very enthusiastic about it being a sales tool and how it would help them generate sales. And that... that was really the main feedback that we got the other... the other people we spoke to talk again about the field application. The technicians being able to quote work in the field and how would help to generate revenue for them. They were very high on that. They did use it as an administrative tool. They fill out of it. They do like that. So, I'm just a little bit of feedback on why we decided to go with BuildOps.

MARIBETH

7:33 Yeah. I think that's... that's really helpful. And I appreciate you being so kind, have open and transparent about, you know, the evaluation process internally within your team. Yeah, I mean, I... I can't... I can't say we're not disappointed.

STEVE

7:52 Totally understand.

MARIBETH

7:53 Yeah, yeah.

LAUREN

7:55 Did you say Steve, that there were like two camp, so, so for the... the accounts that were more focused on the operations and the camp that was more focused on the sales aspect.

STEVE

8:05 Saw the... the, you know, we had a good mix in there. So I made sure that we had an estimator in there as well, too, right? One of our service estimators that works on the sales side. But a lot of the people that are gonna be working in BuildOps or service trade on a daily basis. For the ones that have the most influence, right? The ones that are going to be working in a generating po, is getting the reports out of it, doing the invoicing, doing the dispatching, the heavy lifting of what we need a program to do additionally. As, you know, we're... we're... we're we are expanding into other markets as well too.

--- Purchase decision ---

STEVE

8:41 So we wanted an application that I think we're going to launch to maybe Texas next, then, you know, we may roll out BuildOps and Texas to once we get our feet on the ground. And once we're able to... to evaluate and test that we actually have it in place for a while.

MARIBETH

9:00 Yeah, that... that makes sense. Alright. Well, well, Lauren, do you have any other questions?

LAUREN

9:07 I don't think so. If I may be so bold, see that, I don't think this will be the last conversation that we have and I hope you keep us in mind if you all ever do change your mind.

*--- Purchase decision ends ---*

STEVE

9:21 I totally agree and listen if... if you have further questions later today tomorrow, next week, whatever it might be, you've got my number, Mary, Beth, you know, how to reach out to me. Feel free.

MARIBETH

9:34 Awesome. I appreciate that.

STEVE

9:36 Okay. All right, guys. Thank you very much for every either.

MARIBETH

9:41 Yeah, thank you. Thanks for everyone's. Time and good luck to you guys to.

STEVE

9:44 Thank you. Bye-bye.

MARIBETH

9:45 Alright. Bye.

*The End*