



# Call with Cooling Equipment Service Inc - Shane Mandt

Emily Whitehurst with Cooling Equipment Service Inc  
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## Participants

### **SERVICETRADE**

Emily Whitehurst  
*Territory Manager*

### **COOLING EQUIPMENT SERVICE INC**

Shane Mandt  
*Service Manager*

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# Transcript

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EMILY

0:00 Hi, Shane. This is Emily whitehurst over at service trade. Did I catch you at a good time?

SHANE

0:00 Hello, this is Jane.

SHANE

0:07 I, Emily. Yeah, I was trying to, I was like, I gotta call you back. I've been trying, I just, we're unbelievably swamped with work. So just trying to.

EMILY

0:17 Yeah, no worries.

SHANE

0:21 Fit everything in the schedule. But, yeah, I wanted to give you a call back and to chat with you. Unfortunately, I haven't really had a whole lot of time yet to really look at the service trade demos, but.

EMILY

0:22 Yeah.

SHANE

0:36 You know, I am looking for us to institute something different because we've had issues with our current system that's for sure.

EMILY

0:37 Okay.

*--- Accounting integrations ---*

EMILY

0:46 Okay. Gotcha. What are you guys currently using?

SHANE

0:49 We have a system that's called say?

EMILY

0:53 Okay. I'm not sure if I've ever heard of that. What all, what all is that doing for you guys right now?

SHANE

0:59 So that's part of the part of the issue is the original purchase of, that was the intent. We had some of our ladies in the front office and our accounting department wanted to have the accounting and the...

SHANE

1:17 Dispatching software kind all inclusive together, which really limited our options. But right now, that's our accounting software, but it's got a whole bunch of clerks with that. And then it's doing our dispatching, POS, all that kind of stuff as well that you would normally see from like a, you know.

EMILY

1:23 He...

SHANE

1:38 Service trade type interface.

EMILY

1:40 Yeah. And you know, we talked to a lot of people where, you know, people in the back office are, you know, an all in one software. And what we kinda say over here is like, it doesn't really exist because, you know, it's always lacking in some department and typically that's you know, with your service side.

--- Purchase decision ---

EMILY

2:00 So it sounds like you guys are definitely experiencing that. So, you know, I know you signed up for some webinars and you said you haven't really had time to watch the recording. And that's honestly why I've been trying to get in touch with you because, we set up like 30 minutes to an hour on Zoom demonstration where a territory man actually like hops on with you and shows you the platform and it kinda runs you through like some mock jobs and shows you what it would look like for your specific business and he's able to answer any questions like right there. And then it's recorded as well. So you can like pass it along to anyone at the company. So it really helps like in your evaluation process.

SHANE

2:01 Yup.

SHANE

2:18 I...

SHANE

2:35 Okay.

SHANE

2:38 Yeah. I mean, that would be something that I would be interested in because there's a few people I'd probably want to have joined in on that, and that'll be great because then I could have a few other people look at it as well.

EMILY

2:44 Okay.

*--- Accounting integrations ---*

EMILY

2:50 Right.

SHANE

2:51 As far as on, just so I have a better understanding you guys who is like Quickbooks or like who do you normally look Sage? What kind of financial?

EMILY

2:55 Please?

EMILY

3:06 Yeah. So.

SHANE

3:06 Book software, do you typically integrate with?

EMILY

3:10 For accounting, we have partnerships with a lot of different accounting softwares and we can integrate with anything that has an open API, but I would say most of our customers are using like Quickbooks online or desktop. We do have like a direct partnership and integration with them, but, you know, that is, are you, would you guys be looking at a change completely like as well as your accounting?

SHANE

3:20 Yep.

SHANE

3:37 Yeah. The accounting is there's so many issues on the accounting side as well that.

SHANE

3:43 Then that's one of the ladies that I would probably have joined us on the call because she's you know, looking at job costing is an issue.

*--- Paper process ---*

EMILY

3:51 Yup.

SHANE

3:54 How about just, you know, job follow up and quote follow up and things like that or issues like internally and then just the interface of trying to say wins interface for like the text to input information is not that user friendly and it ends up costing us time and money, trying to get them to input the information properly.

*--- Access to information ---*

SHANE

4:17 So it'd be nice to see like, all right, what you guys have to offer as far as the flow both on the mobile side and in the office side.

*--- Paper process ---*

EMILY

3:59 There you.

*--- Access to information ---*

EMILY

4:22 Okay. Yeah, definitely. And that's a big thing for us. You know, your technicians being able to have a mobile app out in the field where they're able to like easily log pictures, videos, voice memos, notes. And then, you know, we even have the option where if they're somewhere that doesn't have, you know, like internet access, like it all save and we'll log when they're connected to internet. And then all of that goes straight to the back office where they're able to see it, you know, all that in desktop view.

*--- Type of work ---*

EMILY

4:50 So that communication, you know, between field and office is definitely super important. And I know you said like jobs kind of follow ups and are slipping through

the cracks. Are you guys doing a good amount of like planned work like recurring service?

SHANE

5:07 Yeah. So I mean, at least on the contract side, I probably have somewhere around a couple of 100 contracts which are either, you know, maintenance, full coverage, all that kind of stuff. And then also we're just getting into a lot bigger jobs too where I have multiple phases on the jobs as well.

EMILY

5:22 Okay. Gotcha. And how are you guys currently tracking those reoccurring services? Like how do you guys have reminders setup for when you're supposed to go out?

SHANE

5:35 Yeah, but they don't work that great. If we're being honest that's part of the issue with, the sa in software is very limited. And...

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

SHANE

5:48 They also don't follow up as much as they used to when we first got it in end of 2016 beginning of 2017.

EMILY

5:56 Hello?

SHANE

5:59 Very responsive. But as we've lost like account managers or people who have moved on and things like that, now, it's become very difficult and there's a lot of parts to the program that just like frankly, we can't even get to work.

*--- Purchase decision ---*

SHANE

6:12 So, there's issues with it. My hurdle is going to end up, you know, I gotta talk my boss into it fully of, you know, recommitting money to something that he just spent a lot of money on in the not so distant past.

EMILY

6:12 Right.

EMILY

6:27 Yeah, yeah, no, for sure.

--- Paper process ---

EMILY

6:31 And that's always a big thing. But, you know, the way I see, it sounds like, you know, from, based on what you've told me, it sounds like you guys are having, you know, a good amount of kind of cumbersome issues. It's kinda getting in the way of, you know, you guys making more money.

--- Customer engagement ---

EMILY

6:44 So, I think if, you know, you were able to sit down and look at service trade and kinda see how, you know, we can benefit your business and make you more money by being able to track those recurring services, being able to notify your customers, build a better, you know, customer relationship, have better communication from field to office. You know, I think having all these things, the value, you know, would end up outweighing the cost.

SHANE

6:46 India.

--- Accounting integrations ---

SHANE

7:08 So, in saying that, just so I have like a little bit of an idea in my mind, I'm assuming you guys are cloud based?

EMILY

7:12 Huh.

EMILY

7:16 Yep.

SHANE

7:17 Okay. So I wouldn't have to host the server which I currently do for the sa, win system. So that would, that explains why if you're even if the tech doesn't have, you know, mobile sell service or whatever that it'll update to the main system later on once it does?

--- Pricing ---

EMILY

7:34 Yeah.

SHANE



7:37 How do you have like a ballpark idea of like a per user cost? Because I have, obviously, I'm gonna have people inside the office that have to have access to all parts of the system. And then I'm gonna have my mobile tech users trying to understand like, okay, is it same cost for each? Is it a monthly cost? Is a yearly cost? Is there a setup cost?

EMILY

7:52 Okay.

EMILY

8:01 So...

EMILY

8:03 We actually don't charge for office users are free and unlimited. We only charge per technician. And then our base package is around, you know, like I believe it's around 79 dollars per technician. But the thing, the reason why we do the demos is actually to kind of evaluate, you know, your business, see how many, you know, licenses you would need, see like what parts of service trade would be most beneficial for you.

--- Purchase decision ---

EMILY

8:32 So pricing, the best way to get like the best understanding of pricing would be to do a demo. And at the end of the demo, the territory manager can give you like a rough estimate of how much it would cost. So, how many technicians do you guys have right now doing service?

SHANE

8:45 Yeah. Yep.

--- Type of work ---

SHANE

8:51 So, on service side, well, I'll just give you a number of around 30.

EMILY

8:57 Hum.

SHANE

9:00 We also, we have three companies for one thing now, as far as like the other two companies, they, their tax or should I say, their workers don't necessarily post their own hours like my service text, do.

EMILY

9:14 Hum.

--- Pricing ---

SHANE

9:19 So, it's a little different there. But if, you know, depending on, you know, that's also how we have it set up with our current system total all around, we're around 75 to 80 employees between the three different divisions. But, but as far as like what I'd be looking at on the mobile side, probably right around 30... mobile users.

EMILY

9:32 Okay.

EMILY

9:38 Okay. Gotcha.

--- Type of work ---

EMILY

9:40 And, what kind of work are like your service types doing day to day? Like what's your biggest workflow?

SHANE

9:48 Our biggest workflow is commercial and industrial refrigeration and building automation.

EMILY

9:56 Okay.

EMILY

9:58 Gotcha. And we also, you know, we're one of the few companies that offers like refrigerant tracking as well.

--- Purchase decision ---

EMILY

10:03 So, a lot of refrigeration companies find a lot of, you know, benefit in service trade as well. So, I definitely think it will be, you know, definitely worth you guys time to sit down here with Michael and just kinda he'll be able to walk you through, you know, the platform. Like I said, get a little bit more understanding about your business. And then from there, you know, if you wanted to bring in more people, you know, you'll have the recording and kind of a rougher price estimate. If that's something, you know, you'd be interested in going ahead and getting on the calendar.

SHANE

10:33 Yeah. And actually, I mean, at least on our end, it's probably easier for us coming up to Christmas and New Year's and our customers tend to be a little less needy because they're preoccupied. So we're coming up. We're coming up to a point of where like it. We could probably fit something like that in.

EMILY

10:48 Right.

EMILY

10:53 Yeah. Awesome. I mean, I have my calendar up here. If you wanna go ahead and pull yours out.

SHANE

11:03 The only thing I would say with it, is I got at least one, possibly two people I'd like to sit in for that piece of it.

SHANE

11:13 But if we plan it out.

SHANE

11:19 What is your schedule look like the week of the eighteenth?

EMILY

11:24 Let me see here. The week of the eighteenth, honestly. And Michael is pretty wide open here, the week of the eighteenth.

EMILY

11:35 The only thing would be a couple of things here like early Monday morning, but pretty much any day or time works for you guys would be great.

SHANE

11:41 Yeah.

SHANE

11:44 Yeah. Monday is a tough day for us too, because that's brought payrolls trying to be processed and finalized and all that good stuff.

EMILY

11:48 I...

SHANE

11:56 Just trying to see.

SHANE

12:02 I'm going to send you an e-mail I'm gonna respond to your last e-mail and add a couple of people on there.

EMILY

12:09 Okay.

SHANE

12:10 So, we can get a little verbal feedback from them.

EMILY

12:15 Okay.

SHANE

12:16 When we might be able to like, at least you said it'd probably be like a team's call or a Zoom meeting, right? Yeah. So they could even dial in, yeah, you know, if we're not altogether, because a lot of us do travel for work too.

EMILY

12:23 Yep. It's a Zoom meeting.

EMILY

12:29 Okay. Yeah, they could just dial in if they're on the road.

SHANE

12:32 Yup. So I'm gonna add a couple of people to this for the initial and I'm gonna respond and then we can kinda see.

SHANE

12:47 Do that right now.

SHANE

12:53 While we're on the phone?

EMILY

12:55 Perfect.

SHANE

13:01 Do...

EMILY

13:18 I...

SHANE

13:27 Body the next two weeks?

EMILY

13:53 Okay.

SHANE

14:01 Right.

--- *Purchase decision* ---

EMILY

14:14 I know you said, you know, you guys... would have like more time to do something like this now at the end of the year, are you guys looking to go ahead and switch?

EMILY

14:25 You know, starting to switch your process over here at the beginning of the year? Is this just kind of, the like initial phase?

--- *Purchase decision ends* ---

SHANE

14:32 So, I planned to see my boss is an interesting cookie is the best way I can see it. He's one of those where I've been planting seeds in the last couple of months of.

SHANE

14:47 Looking into some of this stuff. So like BuildOps, BuildOps is another one that I've looked at and just trying to get like a feel for it. We all know that say has deficiencies, it's just how fast can I talk them into making a move on what will work for us best.

EMILY

14:49 Hey.

EMILY

14:59 Okay.

EMILY

15:05 Right. Yeah, for sure. And.

SHANE

15:06 So, I mean, I know at this rate, like it's going to be hard to start integrating anything before the end of the year, but, you know, and even talking with the, some of my other ladies in the office working like our accounting department and stuff like that, they have a lot of catch up to do any way usually in the first part of the year with taxes and things like that where it almost even to that to me, it sounded like to them like, you know, it almost be better like a February leading into March type of thing anyway. And I'm assuming, you know, that's a win was like this and a lot of you guys as, you know, competitors are like this where you guys would have a team or at least a person or two on site for like the go live week and things like that.

EMILY

15:15 Yeah.

EMILY

15:39 Yeah.

EMILY

15:57 Yeah, for sure. And that's something, I was gonna bring up, you know, in a company of your size, you know, and after you meet with Michael, I'm sure he'll mention this but, you know, he, he's more than happy to, you know, go out there and be on site, you know, and meet with your boss.

*--- Implementation and ongoing support ---*

EMILY

16:12 You know, if the initial conversation goes well, I, and that's something that, you know, you guys would see as beneficial for our next step. And we also have an entire onboarding team, you know, that works, really hard to move all your data over. And so it's kinda no trouble for you guys and, you know, we don't just leave you out to fail and then we onboard do. And then once you're on boarded, you're assigned an account manager who stays with you your entire time on service trade. And there basically, you know, your go to, for any technical issues. I mean, any issues you're having at all? So, yeah, for sure. We have an entire team that, you know, is dedicated to onboarding, and we also have a lady who her whole job is, you know, accounting integrations, and... working with your accounting team to make service trade work.

*--- Implementation and ongoing support ends ---*

EMILY

16:57 So, I definitely think, you know, we have all the right people in place to help, you know, convince your boss to take that step for sure.

SHANE

17:06 Yup. Okay. Yeah, I sent that e-mail I responded to you and added to redo, rodrigu, and Victor, eve, see what their schedule is like. And then, yeah, we can get something scheduled up and I'm sure they will follow up. So, and I'll make sure if they didn't see the e-mail that I'll be talking to them in person. So I would say by early next week, we should have probably by Monday, some type of feedback as far as what they have available.

EMILY

17:12 Huh.

EMILY

17:33 Okay. Perfect. Well, that sounds great. I'll look, I just got your e-mail so I'll look forward to hearing back from them. And then if like later in the day on Monday, I haven't heard anything. I'll give you a call or shoot you an e-mail.

SHANE

17:44 Okay. That sounds good.

EMILY

17:46 Perfect. Well, thanks so much for your time, Shane. It was great to talk with you.

SHANE

17:50 Yup. Thank you, Emily. Sorry, it's just taking a little bit.

EMILY

17:51 Have...

EMILY

17:54 Have a good one.

SHANE

17:56 All right. You have a good weekend. Bye.

EMILY

17:57 Bye.

*The End*