



ServiceTrade Demo with Rieve Fire Protection

Jonathan Middlemas with Rieve Fire Protection
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Participants

SERVICETRADE

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RIEVE FIRE PROTECTION

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Topics

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Transcript

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JONATHAN

0:00 So, you know, pretty much just, to kick it off, pretty much the plan is just going to be for me to, you know, learn a little bit more about your business, what you're looking to accomplish, you know, with potentially bringing, you know, something like service trade onboard. And then, you know, I'll give you a background on service trade. We'll look at the product, you know, have, some conversation about it. Then at the end, if you think it's worth setting up like an additional meeting, we can get that scheduled on the back end of the call if that works. Yeah, absolutely. All right. Yeah. So.

ERIC

0:29 Me in a little bit. I mean.

JONATHAN

0:30 I know, you know, basically, I know you're with InspectPoint, you looked at service trade a couple of years ago, and it seems like you went with InspectPoint at the time. I also know, and I'm kinda curious about that. You know, you sat in on the project management webinar, as well as, you know, the sales manager webinars. So, yes, just to kinda started off, you know, what were your thoughts on, those webinars?

ERIC

0:50 That, the thing is actually the reason why we started kind of reach out again is because it looks like you guys have expanded, your range a little bit on what you guys offer us.

JONATHAN

0:59 Services.

ERIC

1:02 And, you know, at the time that we went with InspectPoint, which was two years ago, I think now like their system for how they track and document and like the workflow that they have for inspection deficiencies, just jell better with us. And it might still, but well, you know, it's kind of a different road. But the other side of our business, the... estimating proposing quoting billing side of the business, InspectPoint doesn't do any of that. And so, we've used other software for those tasks. And it looks like at least from what I can tell in the last interviewing years, you guys have really expanded that side of it. And so that's where it's more kind of like interested in kind of taking a second look to see how you guys handle quotes and estimates and proposals and...

JONATHAN

1:56 Stuff like that where.

ERIC

1:58 You know, InspectPoint on we have InspectPoint is that they've got a relatively decent calendar for tracking all of our inspections, but I can't fill in my Construction projects on the same calendar, right? So, like when I've got a small group of guys that does a lot of different types of work, it's kinda hard to let anyone know that they can, you know, they can go ahead and schedule one of my guys for an inspection or, they think they can because they don't see anything for his name on that day, but he's actually scheduled to do, you know, a renovation job that day and...

JONATHAN

2:32 Right. That's...

ERIC

2:34 Where one of the pinch points really is. And then also just general things about like you're preparing, you know, proposals and making them look good and getting, you know, customers to sign them. And then, you know, the fall through with the invoicing, and the tracking of costs and everything is like, you know, it's really, it's very kind ad hock and split over like four or five different systems. And so just kinda basically wanting to get a quick overview, you know, how that comes together with you guys now that you're a bit broader... and like one of the biggest questions like I had like in, the sales manager thing I watched just, was that just yesterday?

JONATHAN

3:15 It...

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ERIC

3:16 The day before, like, is that like a separate thing that cost separate or is it all just included in service strict like trade? Because like, you know, they have like you guys have a different name for like Northboundary or whatever. It makes it sound like it's like a different extra cost.

JONATHAN

3:29 Yeah. So, to answer kind of like, that question? Yeah, this was probably brought up in the webinar, but, you know, Northboundary, was it's a company we, you know, acquired.

ERIC

3:41 Gotcha.

JONATHAN

3:42 Probably like, you know, eight months ago or something like that. So it's been a little bit of time, but as of right now, I mean, it just, it's all kinds of it's still, you know, separate essentially. I mean, the they'll like, you know, talk to each other a little bit and, you know, integrate with each other. Obviously, that's on the road map to have it all, you know, just be, you know, one, but that stuff takes a lot of time to make sure that, you know, nothing gets lost in translation. So, as of right now... you know, maybe the easiest best way to view it is, you know, two two separate, you know, products because it is, you know, for today's, terms, it is, you know, service trade and you can buy them separately as well. So that's how that works and they are separate products.

ERIC

4:35 If we, if so, if we did the service trade subscription, whatever you guys have like 120 bucks month, we don't get access to that then.

JONATHAN

4:43 No, you wouldn't get access to like the Northboundary service manager, you would get access to like the project management, you know, everything that you've probably seen service trade in the past as well as, you know, our inspection manager.

ERIC

5:00 Okay.

JONATHAN

5:00 That, that's those are like what service trade is today. And in Northboundary is still, you know, its own separate thing.

ERIC

5:08 Okay. Gotcha.

JONATHAN

5:09 Make sense. Does that, does that help?

ERIC

5:11 It does, yeah... because.

JONATHAN

5:15 What are you, what are you most interested in? You know, are you looking to, you know, get service trade core with like the inspections? And I mean, that comes with, the project management piece included in that, it's not separate.

ERIC

5:33 Yeah. Well, it looks, it, it's yeah, it's hard because like your website doesn't really seem to make like clear that there's differences. It just seems like there's just service trade. Not exactly sure. Like I said, we don't really need inspection stuff at the

moment because we're pretty happy with InspectPoint. It's the other side of the business. Like I said, the project management and estimating proposal quoting, contract writing, all of that stuff that's really the pinch point. And like, you know, yeah, that's really, it's more of that. It's really more than you know, it's more the more accounts receivable like writing invoices, having part databases that you can have pricing. So people can do estimates... with, you know, we more quickly and cleaner with, you know, customer accounts and stuff all pre filled instead of having to always constantly like write things out all the way is really what we're looking for. And that's kinda what I thought that Northboundary thing looks kind of like it was. But maybe I'm...

JONATHAN

6:37 Yeah. So that Northboundary, so, when you're talking about writing proposals, you mean like not like service work but like, to write up like a service agreement and things like that for like.

ERIC

6:50 Yeah, or like, you know, to install a new sprinkler system for like 200,000 dollars or whatever, you know, like those sort of like actual Construction contracts, stuff, and managing those projects with job costing and estimating that whole stuff that whole like pipeline from an estimate to a quote proposal contract.

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ERIC

7:10 And then, you know, labor tracking... and then, you know, Progress invoicing and the whole stale, that whole workflow. But it sounds like maybe that's kind of like two separate products for you guys?

JONATHAN

7:25 Yeah. So that's what I was just getting ready to say. So it sounds like you're looking for, you know, Northboundary as well as project management, correct?

ERIC

7:35 Yeah. I me, is only, they were integrated more than I guess they are.

JONATHAN

7:40 So, I'm not sure. I haven't looked at our website a lot in a long time to know maybe how it's praised. But, you know, I believe you, I'll say that. So, yeah, basically, yeah, because that's just the way that, you know, we have it kinda have, the products like lined up. So Northboundary already kinda went with this and the project management inside of service trade core, which is where, you know, we're tracking your services, doing your deficiencies and your quoting and things like that.

ERIC

8:11 So, gotcha.

JONATHAN

8:13 That's kinda where it lives. It's you know, I know you're on InspectPoint and, you know, maybe, you seem, you know, happy enough with it but, you know, that's kinda like, where service trade core lives.

ERIC

8:28 Gotcha.

JONATHAN

8:29 Like, the project management would just be part of that where you can do those change, you know, change orders, you know, work in Progress, things like that, you know, tracking budgets in our project management. I know you set through the webinar, so you're probably familiar, but it's kinda that's the way it's structured. You would have to, you know, for the project management, you know, it would be like most beneficial for your business to like maybe move out, of InspectPoint because we, I mean, we do have inspection software as well. That way you could track and manage all your deficiencies in quoting, you know, in one place... is that something makes sense to you or is that just, you know?

ERIC

9:08 Like I said, I guess, yeah, I'm not sure. It does like right now. Like I said, like I said, we're much more, you know, stuck, with the CRM and, you know, invoicing part of the business less so with the inspection reporting part of it into like that thing is like InspectPoint does that one thing pretty well? Like would be really hard to like change lanes on that if it like it was integrated with everything else. It'd be kind of a different story I think but like, and, you know, right? Because like right now we use, you know, we use autodesk build and we're using another software called contractor form in right now to do that like project management stuff.

JONATHAN

9:48 Yeah.

ERIC

9:48 Right now, we have two softwares, InspectPoint contract for a contract or form and I'd love to have one software. So, so some of those more recent videos kinda made it look like that was suddenly the case which is why it was more interesting. But if they're still kind of, you know, siloed from each other... I think it's a little harder, of a transition to make because we like said our inspection report system like it's really custom already as it is. And we, you know, we spent years kind of setting up our inspection system. We're kind of like and that's a tough part for me is like we come from, you know, in the inspection side of business, you know, I started doing digital inspection in about 25 years ago with what was it a life safety inspector, I think in like a pom pilot too, and went from there to trade master, mobilize with Tom German. And like as we've gone through it now, this back point like all those steps along the way, like I worked with the owners of these companies to like help write like they didn't even like I remember work with Tom German on how to write a hybrid flow test calculations and like he even get it done. So like, our inspection system is very custom, right? And like we're very picky about how our reports are

generated. So like that's not what I'm looking to change at the moment, if that makes sense?

JONATHAN

11:09 Yeah, no, absolutely. I mean, I totally get that it's a big undertaking. You, you're more familiar with me because, you know, you've done it a couple of times. So.

ERIC

11:17 And...

JONATHAN

11:17 That...

ERIC

11:18 It's just like, you know, a lot of companies and it's like, and I don't know the specifics particularly of your, I mean, besides watching a few YouTube videos on how your inspection software works versus InspectPoint, you know, but like this is, the amount of work we've put into making InspectPoint work for us to the point that it doesn't even they're not really at the point where we want them to be yet, but they're getting there. Is it like it to be hard to jump shift at the moment? So like we were like I said more interested in, the other side of the business the, you know, the counting and, the billing and all of that sort of stuff that, you know, that's where our pinch point is.

JONATHAN

11:57 Yeah. And like I said, I mean, I don't wanna like waste your time or, you know, just repeat, no, because I know you understand, but.

ERIC

12:05 Yeah.

JONATHAN

12:05 The way that we're set up, it's all kinda lumped in together, you know? So we're kinda trying to go down the road of becoming, you know, that all in one, you know, software with different options but all under one roof. So, you know, businesses like yours could take advantage. And then other businesses that like don't need project management. Well, that's fine too. You know, we'll have it there if you need it. But if not that's you know, it's an option. So that's the road that we're in. And right now, it just doesn't seem like we have stuff like packaged and boxed... to where it makes sense, you know, for.

ERIC

12:41 Yeah, probably not like hopefully that'll shit, you know, if that does change, you know, we said we're pretty, you know, on top of tracking the market with these stuff and...

JONATHAN

12:50 Yeah.

ERIC

12:50 Keep an eye on things. We go to the, you know, we saw you guys at the say convention last two weeks back and I said we'll just keep on keeping on I guess. And, you know, if things like that sales manager does get more integrated and get more about like not just integrated but also like, the costing platform of it, you know, is more integrated. So we're not having to buy, you know, 300 dollars of software per person or whatever, how. And I guess Northboundary manager is even priced then. So that's something you not even really into then, right? Is that like a separate division of your company then for like from a sales perspective for you?

JONATHAN

13:26 As of right now, yes, I mean, that'll be something that I take on in the next few months. But yeah, right now, we kinda, we have people that obviously like work before that are a lot more familiar. So we're still working through, you know, those sorts of growing pains that come with acquiring, you know, a company. So there would be a separate conversation with somebody else. I mean, I can set it up for you. I can send you some additional resources. I don't know.

ERIC

13:54 It might just be best to kind of wait to see how things grow a little bit, maybe.

JONATHAN

13:57 You...

ERIC

13:57 Know, because like if you guys can integrate better between the two software. And then if the pricing structure for it becomes more integrated as well, then like that's probably a lot more value for everybody. So.

JONATHAN

14:10 Yeah.

ERIC

14:10 You know, it's probably just best to kinda like see what happens I guess for a little bit.

JONATHAN

14:15 That's and that's perfectly fair. What I'll do. I mean, I always make notes of stuff like this. So, I know when the best time to like send Eric an e-mail and then like, hey, what we spoke about. And this is kind of where we're at if you're interested in picking it up. So I can certainly leave myself, you know, a note and reach out when it would make more sense, if that.

ERIC

14:35 Yeah, I think that makes sense.

JONATHAN

14:37 Yeah, man, I can do that. I will tell you man. I appreciate like talking to you for these few minutes and you being like transparent with me. So then I can kinda do the same back to you because that's just kinda how I role.

ERIC

14:50 Yep. Well, yeah. I mean, I said we've been in this in the market for so long and I understand that like every technology platform is different. You know, no platform is perfect. You know, everything's gonna have like and we've used so many over the ServiceFusion and, you know, said mobilize life safety inspector like it's just been all over the place and, you know, it's there's that unicorn basically like the perfect software that everyone wants to have, but no one can actually like, I mean, you could be like pro core and say you have everything in charge of 1,000,000 bucks and still not be great. So like, you know, there's a broad range and.

JONATHAN

15:20 Yeah, man, we're working on, we're working on getting there. So, I mean, as, you know, since you've looked at us two years ago, obviously quite a few things have changed and, you know, a year from now it'll be different again and hopefully, at that time, you know, it'll be something that's like, you know, pretty close to perfect for your business.

ERIC

15:37 Yeah, that's like the biggest thing is just like keeping an eye on it because like all the different CRM or like ERP systems that are out there that none of them even seem to care that sprinklers even exist like at least for like service trade, like gets that fire protection is an industry that matters, right? Like we're really hopeful that you guys, you know, kinda do get there because like nobody else seems to even to be trying, you know?

JONATHAN

16:01 Yeah, that's our bread and butter man, fire protection. We obviously work with some excuse me, hvac contractors, but for the most part, it's fire protection that's the Lane that we're most comfortable.

ERIC

16:12 So, yeah. So I said, well, keep an eye on it and we'll hopefully get to reach out again, you know, sometime in the future.

JONATHAN

16:17 That'll work one more question for, you know, got answered if you don't want to. But Chris left me a note that you met with BuildOps. What do you think about them?

ERIC

16:26 Well, well, like I said, I have another meeting with them tomorrow actually. And so we'll see, you know, so that's kinda like the flip side like they don't do anything inspection related, right? You know, they don't have a platform but it seems like they may be a little more integrated with the sales invoicing slash employee management.

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ERIC

16:43 So we'll have to kinda see what they like I said, I've got a second meeting with them too. They're they're actually, but they're at the same time, they're significantly more expensive than you guys. So that's like, you know, going to be a challenge for that price, the value ratio, but it's just gotta, you know, if they can do like that, you know, sales management proposal generation, you know, contract management, and then also just day tracking with projects like that's. Kind of like what we're looking for, which sounds very similar to what you guys have with this Northboundary thing. I just think like it, you know, would just probably it maybe just need a little more time to cook for you guys. So I'm probably not gonna, you know, I don't see is probably going with BuildOps either because they have a very like I don't like their pricing structure making me pay like 180 bucks for like an admin assistant in the office. It's like I don't, they don't need, you know, they're not adding any value to my company is overhead. So like tacking on another 190 bucks a month for every last person to have access to, you know, view something I kinda stinks compare. I think you guys are opposite where you guys give as many back office slots as needed and just build for, the technicians. So like that's going to be a harder that's going to be a little harder sell for them, I think because...

JONATHAN

18:02 Yeah. So we'd go for technicians and then on Northboundary, we would just Bill for like salespeople, like how many people do you have?

ERIC

18:10 Me, I'm the only one.

JONATHAN

18:11 You're the one. Yeah.

ERIC

18:13 And so like it's just like keeping, I just need systems that work better for me. Like I have so many different silo projects with like, you know, I use excel for the actual like math part of the estimate. I use Pipedrive. Well, at least I used to, I got, I dropped them about two months.

JONATHAN

18:30 Which...

ERIC

18:30 Was just for writing the proposals because like they kept, the customer name, like the account information really well organized and they had a really nice custom proposal generator... and then they decided to like double their price. I'm just gonna do it in word, I guess.

JONATHAN

18:47 Yeah.

ERIC

18:48 Now I just do it in word and then I use contract or form in to once it's a project to track the cost, then the labor hours and all of that sort stuff. So I can watch the projects even, you know, project cycle, for job costing. So like it's you know, it's four different steps. I'd love it to be one step. Yeah. And that's and then there's the side of it is like what I'd love to have is a system that also is a little usable so that if my brother needs to do a small like proposal to like replace a rise or something, I have a product database of couplings and fittings and elbows and pipe that, I keep up the date and he can just get into it real quick and do something that I have to like, you know, research the whole wheel on what everything costs. And so that's kind of where we're stuck that's where I say that's like the big pinch point is not being able to get those estimates done quickly and accurately, on the huge scale difference between a 200,000 dollar, you know, system install at a school versus, you know, 2000 dollar riser build and having one estimating platform that can do that range of work where I can do excel super easily. But, you know, God forbid it, it'd be that simple somewhere else for some reason like.

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JONATHAN

20:03 Yeah.

ERIC

20:04 For man like contract or for man, has, you know, in a very cheap software has a really decent way of tracking the costs between labor and materials and all that sort of stuff. But when I try to make an estimate like that, you can't put in like or not very easily like four inch group openings. I want four inch group openings, three inch group openings, two inch group openings, in a parcel list and they don't really have the ability to do that. And that's where it's like gets frustrated. So they're bent, they're better for large shop costing where you can just put, you know, labor materials and, you know, four or five different subs and stuff like that contingency, right? But they don't do that small service based, you know, estimating that. I bet your guys software probably does a lot better... but the problem is we can both.

JONATHAN

20:48 Yeah, because you want to build that proposal. Obviously after you win the bid, then you want to be able to track.

ERIC

20:56 Track...

JONATHAN

20:57 It against the budget against the bid that you put together, correct?

ERIC

20:59 It's like, you know, once we have like 70,000 dollars in fab, and, you know, loose materials and heads, like I need to build to put those invoices as they come in into the system so they can track the labor, the materials, track the labor. And so that's why we, you know, we're kind of stuff where I know that I know that like technologically we're in a bad spot where we're a small company. So we don't have a lot of, you know, resources to pay for software and we do both 50 percent service and inspections at a very high level. And also, you know, new Construction projects. So we're it's just tough for us.

JONATHAN

21:32 Yeah, no, absolutely. You got, I mean, you're in a good spot, I think, yeah, you're almost like in too good of a spot in the sense of you're like you're ahead of you're like kind of ahead of where any of the softwares are at, you know?

ERIC

21:45 Yeah. Well, I think I've been that way for 20 years, like I said, I was.

JONATHAN

21:48 Yeah, it sounds like, so we're trying to catch up with you just so, you know, Eric, we're trying to catch up with you and when we do, we'll let you know because.

ERIC

21:55 Yeah.

JONATHAN

21:56 It sounds like it'd probably make, your life a lot.

ERIC

21:58 We've kept software for ages and like I said, a lot of it's great. Like your branding style is great. Your, your cleanliness of like, the user interface and the cleanliness of the presentation to customers is really great. So, like it's got a lot there. Like, you know, a lot better than a lot of their brands. It's just on the technical side of things. It gets sticky inspections where, you know, I have every intention of sitting on end of 25, it some day on, you know, as a technical member. And so like I need my inspection reports to level of complexity, that we need. And so like, no, and no one does that. Like it's back point. We've had to like do tons of customization on its back point to get it to our level. And we don't even use them for fire pumps because their fire pump inspection reporting just doesn't meet our standards. We actually use host monsters reports for the fire pumps because they actually track performance correction curves and power outlet and stuff like that properly. And so like it's tough for us like we, we're just have very specific needs, I guess.

JONATHAN

23:01 Yeah, absolutely. And there's nothing wrong with, there's nothing wrong with wanting to be, you know, as professional as possible, right? The everybody's goal awesome.

ERIC

23:08 Yeah. So that's kind of where it is. Well, I said you guys do have a lot going for you with that kind of like professionalism look that a lot of other softwares kinda lack. Like one of the things that we like, we don't use InspectPoint for service contracts because when I generate it through their software, they don't know how to handle page breaks. And so it looks fine if you open it up in a web, it a web, you know, browser and it's just a browser. But if they open up it as a PDF, if one line is one, was one, is one, you know, space too long, then I've got a whole blank page of paper because they didn't have their line breaks set up properly?

JONATHAN

23:41 Really?

ERIC

23:41 Yeah, I use like, so like it just looks horrendous, right? And so, those sort of like little things, you know, that for me is personally that are just a nonstarter. Like I can't have a two page contract to be four pages long with two pages that are half empty because they don't have the ability for me to customize line breaks or page breaks.

JONATHAN

24:01 All right. That's interesting.

ERIC

24:03 I guess I'm pretty picky.

JONATHAN

24:05 No, you're not, I mean, you're picky, but in the, in kinda the right things like why would you send somebody a four page report? And two of the pages are blank that?

ERIC

24:11 You?

JONATHAN

24:12 Didn't double check your work?

ERIC

24:15 Yeah. It makes me just makes me look like, you know, too bad. So.

JONATHAN

24:18 Yeah. I guess I get that. I'm kinda the same way when it comes to stuff like that. So, I can relate specifically to that example. Yeah. But did you say you're on the nfpa board? Is that?

ERIC

24:29 I want to be not quite yet. So like I have to say, like I work with as a technical committee stuff, I'm one of their teachers for their apprenticip program. So I'm trying to get more and more involved on the, as a side. They're opening up a new technical advisory committee that I was, I'm pretty hot to get a seat on. Okay? And I'm hoping that will spring board me to an actual committee seat. You know, I take my time, five or six years maybe.

JONATHAN

24:53 Absolutely. The only reason I ask this is getting off track is we have a gentleman that works for us. His name is Jack cofelt, but, he's on a couple of those boards with the pa and I don't know if a fa or not fsa or not. But I didn't I was just gonna really suggest to you that I don't know if you're on LinkedIn or anything like that. Eric, but Jack is, I'll suggest, you know, linking up with him or at least fall on him because he posts a lot of stuff. It's all obviously, you know, fire protection, specific code, updates, things like that. So, you know, it's always good to just, to network and if that's kind of where you're working towards, he's a good person to.

ERIC

25:34 Co, field, I think the name rings a bell.

JONATHAN

25:36 Yeah, I think I've met.

ERIC

25:37 Him personally, but...

JONATHAN

25:40 Yeah, I'll put it in the chat, so I don't like I said, I don't know if you're on LinkedIn?

ERIC

25:45 Yeah.

JONATHAN

25:46 Yeah, look him up and, you know, follow him, or whatever, but he's very involved in those organizations as well. So just figured why I had you if that's what you're looking to do. It's. Always nice, to have somebody, to network with.

ERIC

26:01 Absolutely. Thanks. I appreciate it.

JONATHAN

26:02 Yeah, not a problem. I'll let you go. I really appreciate you hopping on here, you know, and kinda fill me in on what you're looking for. I believe that we'll catch up to you in the next 12 to 18 months with what you're looking for software wise, but right now, you're a little bit ahead of us. Your, your mind is where we're trying to get to. So we're coming and eventually we'll...

ERIC

26:24 Well, we'll keep an...

JONATHAN

26:25 Eye on.

ERIC

26:27 Right. Thanks so much. I'll talk to.

JONATHAN

26:28 You soon have a good one.

ERIC

26:30 Bye bye.

The End