



Call with Cli-Metrics - Kevin Colin

Henry Drake with Cli-Metrics
Recorded on 9/14/23 via SalesLoft, 11 min.

Participants

SERVICETRADE

Henry Drake
SDR

OTHER

Kevin Colin

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Transcript

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

KEVIN

0:00 Good morning, Henry. This is Kevin.

HENRY

0:03 Hey, Kevin. How are you this morning?

KEVIN

0:05 Good. And yourself?

HENRY

0:06 I'm doing well. Thanks. I'm doing well. Yeah, well, thanks for taking the time with me this morning. You know, it sounds like you are in the market for software. Is that correct?

KEVIN

0:16 That's correct?

HENRY

0:18 Okay, awesome. So, I'm curious what kind of software you guys are using now, if any, and what kind of you're looking for in a software?

--- Accounting integrations ---

KEVIN

0:28 We're using a software package called a sent, which is from a company by the name of comp source. I don't know if you ever heard of them.

HENRY

0:32 Okay.

HENRY

0:36 No, I don't think so. So, sounds kinda familiar.

KEVIN

0:38 Compute source is owned by Jonas.

HENRY

0:41 Okay.

KEVIN

0:42 You know, who Jonas is. Yeah. Okay. So that's who that's they are. It's a...

KEVIN

0:51 It's a service contractors based software.

KEVIN

0:58 That has great maintenance contract management capabilities as well as detailed tasking. It has a, they don't, they both on a...

KEVIN

1:15 A GL package or an accounting package from open systems called traverse, but we don't deal with traverse. We only deal with comp source for that accounting package because it's tightly integrated.

HENRY

1:20 Okay.

HENRY

1:31 Okay.

KEVIN

1:33 And the reason I'm looking to make a change is because they're scheduling and dispatching module if you will.

KEVIN

1:41 Is extremely outdated and they're not putting any money into it's development. And we have a peculiar need. It seems for the ability to dispatch multiple technicians over multiple, that the software packages cannot accommodate easily.

--- *Type of work* ---

HENRY

2:05 Gotcha.

KEVIN

2:06 And our maintenance. Our maintenance contracts are pretty detailed and complex. So, what I'm looking for is a software package that offers us scheduling and dispatching that gives us clear visibility of what work we have out standing and

where everybody is at the moment in time, you know, looking at a calendar based system.

--- Customer engagement ---

HENRY

2:33 Okay.

KEVIN

2:33 And be able to replicate the level of tasking that we have. We also have a web portal through them.

HENRY

2:40 Like a customer portal.

KEVIN

2:42 Yeah.

HENRY

2:43 Okay. Got it. Yeah, I mean, everything you said we can do, right? We're built for companies doing commercial service, particularly doing a lot of preventive maintenance.

--- ST app contracts and pricing ---

HENRY

2:56 You have service contracts. So definitely checking off. There. Is there anything else you can think of that is the top need besides, you know, scheduling dispatching? And the tasking?

KEVIN

3:09 Well, tasking web portal. Do you have a quotes module?

HENRY

3:15 We do, yeah.

KEVIN

3:16 You have a quotes module? Okay? So I assume it then, do you must have job cost for a larger project?

HENRY

3:20 Job costing? I believe we do. I'll make note of that. I'm not 100 percent sure of that.

KEVIN

3:26 What's the accounting package that is your, is the accounting package that you guys have? Is it part of service trade or is it a bolt on like Quickbooks?

HENRY

3:36 So, yeah, we are not an accounting platform. We do have integrations with, you know, like Quickbooks, Sage, we have an open API, so we can integrate with pretty much any accounting platform.

--- Access to information ---

KEVIN

3:49 Okay. And it's cloud based software.

HENRY

3:52 It is.

KEVIN

3:55 And what is the method of... access? Is it, do you have an app or do you have a browser?

HENRY

4:05 So, we have both app for technicians out in the field, you know, so they can do their work on there in the field, you know, take pictures, what they need to do an interview for office and admin as well.

KEVIN

4:18 Okay. Say that again, Henry, I'm sorry.

HENRY

4:20 So, there's an app for technicians that they can use out in the field, you know, to do work orders on report, deficiencies, things like that. And then there's a view for office and admin, you know, web based. So... they can, you know, see the scheduling, dispatching, everything like that on there?

KEVIN

4:41 Okay.

KEVIN

4:46 So, the office would be using a browser for accessing and the field would be using an app?

HENRY

4:52 Correct.

KEVIN

4:54 Okay. So when a dispatcher looks at their screen, right? Their dispatch screen?

KEVIN

5:00 So, I assume you have the ability, you obviously have the ability to create a call or a ticket or, you know, service call comes in, right? Too. Hot dispatcher goes in and create something, right?

--- Dispatch ---

HENRY

5:12 Right.

KEVIN

5:14 Okay. So, once they've created that.

KEVIN

5:19 That request?

KEVIN

5:21 And dispatched it to the technician, how different of you, does the technician have than what the dispatcher sees?

HENRY

5:32 You know, that's a good question.

HENRY

5:35 I'm not too familiar with that. I think the best way forward would be to set up a demonstration over Zoom, you know, run through some of those mock jobs and calls and kinda show you exactly how that happens.

KEVIN

5:49 Okay.

--- Purchase decision ---

KEVIN

5:50 So you're a qualifier, your role is to go out, find out who's interested, do some preliminary qualification and then pursue setting up a demo of some sort.

HENRY

6:03 Correct. Yeah.

KEVIN

6:04 Okay. I got.

HENRY

6:07 Yeah. Dan, he works with companies in California and he's really a product expert. So he'll you know, run you through mock jobs and everything to show you how it works.

--- Purchase decision ends ---

KEVIN

6:17 How big is service trade? Where are you guys based out of? How many people do you have? You know, in the company? That sort of thing?

HENRY

6:25 Yeah. So based out of Durham, North Carolina?

HENRY

6:30 We've got field reps kind of all over a few in California.

HENRY

6:34 About 200 plus employees.

KEVIN

6:38 Okay.

HENRY

6:39 And over 1,200 active customers right now.

KEVIN

6:44 And who is service trade a privately held company?

HENRY

6:49 Sorry say that again? Yeah.

KEVIN

6:51 Is service trade a privately held company?

KEVIN

6:55 It is, okay.

HENRY

6:58 Yep.

KEVIN

6:59 Well, at least for today anyway.

HENRY

7:01 That's right. Yeah.

KEVIN

7:02 Yeah, ascent was privately held once upon a time too?

HENRY

7:07 Okay. Yeah, you never know, I guess. Yeah.

KEVIN

7:07 So, nothing stays the same. Yeah, you know, and that's one of, the other challenges with a sent is, you know, they.

KEVIN

7:17 They were acquired by, Jonas is owned by even a larger company called constallation.

KEVIN

7:23 And they, quite frankly, I don't give a shit about any of the industries. They re, it's all about, you know, how much money are they making? So.

HENRY

7:31 Right. Yep. Yeah. I know we've tried, we've had some companies. I've tried to buy us out.

HENRY

7:37 Particularly some of our competition. I don't think that's what our CEO wants to do right now.

KEVIN

7:43 Yeah. Okay. Well, let's go to the next step because right now, it, I'm working with BuildOps to see if they're gonna, I've cold through a lot of software packages and they're, the last one standing other than you guys right now.

HENRY

7:55 Okay.

--- Type of work ---

HENRY

7:59 Cool. Yeah. Well, let's definitely set something up. Just curious. So, you guys, I mean, look at the website you guys do mainly commercial services at all commercial service? Do you guys do any residential?

KEVIN

8:09 No, no, residential.

HENRY

8:11 Okay. Perfect. And then how many technicians are you guys at over there right now?

--- Type of work ends ---

KEVIN

8:16 We've got, I don't know eight or 10.

HENRY

8:21 Okay. Perfect.

HENRY

8:24 Let me pull up my calendar. Is there a day next week that works best for you?

KEVIN

8:30 Next week is not gonna work.

HENRY

8:32 Next week, I work. Okay? The following week you open?

KEVIN

8:34 Yeah.

HENRY

8:36 Or tomorrow by chance?

KEVIN

8:39 No, I'm pretty much booked out two weeks in advance.

HENRY

8:40 Okay.

KEVIN

8:44 Which is one of the reasons why it's been so difficult for you and I to just to have this conversation.

HENRY

8:49 Right. Yeah. Busy man.

HENRY

8:54 Is like 27, 28.

KEVIN

8:54 So...

KEVIN

8:59 Yeah, the...

KEVIN

9:05 Yeah, the, but as I mentioned, I'm pretty much booked out two weeks in advance so, I'm done for the rest of this month calendar wise.

HENRY

9:12 Okay.

KEVIN

9:15 The first opening that I would have.

KEVIN

9:20 Would be October fourth or fifth sometime in.

HENRY

9:26 All right. Let's see here.

HENRY

9:31 How would October fourth, nine am work? Or we could do seven am? Yeah.

KEVIN

9:37 Nine am Pacific Time?

KEVIN

9:40 Yeah, that'll be fine.

HENRY

9:41 Okay, perfect. Nine am. Is there anyone else who want me to include on the calendar invite?

HENRY

9:48 Okay. Just you perfect. Well, I will shoot you over this calendar invite and I'll follow up with, you know, October third just to make sure nothing came up and we're still good to go.

KEVIN

9:58 Yeah, and that, that's always possibility, Henry. So just fyi.

HENRY

9:59 Awesome.

HENRY

10:02 Yeah, yeah. I know you're busy and things come up. So, yeah, I'll definitely follow up with you.

KEVIN

10:07 Yeah, those damn clients, you know, they're so demanding.

HENRY

10:13 Well, sounds good, Kevin. I appreciate your time today and looking forward to talking in the future. Yep. Bye.

KEVIN

10:16 All right. Thank you.

KEVIN

10:18 Yep. And, and, I wanna tell you something you're very professional. You're consistently, you do consistently follow up and that gives you a leg up in the world of sales. There are a lot of people that... are not as professional as you are. So, thank you for that.

HENRY

10:21 Yeah.

HENRY

10:35 I, yeah, I appreciate that. Kevin.

KEVIN

10:38 All right. You take care. Bye bye.

HENRY

10:39 Yeah, you too. Bye.

The End