



# Inbound Call with (949) 355-7875

Sarah Pittard

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## Participants

### **SERVICE**TRADE

Sarah Pittard

*Territory Manager*

### **OTHER**

Phone Caller #1

# Topics

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# Transcript

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

--- Call Setup ---

SARAH

0:02 Hi, this is Sarah at service trade. How can I help you?

PHONE CALLER #1

0:05 Hi, Sarah. This is Tony him on our returning your call.

SARAH

0:10 Yeah. Hey, Danny. How are you?

PHONE CALLER #1

0:12 Good. Thank you.

SARAH

0:14 Good. Yeah, I was just giving you a call regarding your demo request. Did you have a quick second to chat?

PHONE CALLER #1

0:22 Sure.

SARAH

0:23 Thanks. I'll be brief. So to kind of make the most of your time and to prepare my manager for the meeting. I just wanted to learn a little bit more about your company as far as the type of work you guys are doing, what your current process looks like. And then some of the things that you're specifically looking for in a field service management platform, and then we can pull up the calendar and find a good day and time that works for you. How does that sound?

PHONE CALLER #1

0:50 Fine.

SARAH

0:52 Alright, perfect. Yeah. So, do you wanna tell me a little bit about you guys? Be great.

PHONE CALLER #1

0:57 Sure. We're a commercial mechanical contractor. Do we're about a 10,000,000 dollar company? Don't 50 something employees have an ERP field one that we recently transition to BuildOps, not necessarily.

PHONE CALLER #1

1:19 Convinced that this is a long term solution for us. So kind of re, exploring the field, the see what else is out there.

SARAH

1:27 Yeah, definitely. So, how long have you guys been with BuildOps for?

PHONE CALLER #1

1:33 About eight months?

SARAH

1:36 Okay. And y'all, just aren't crazy about it or what are some things that, yeah, you're kinda wishing that would do better?

PHONE CALLER #1

1:45 Just about everything. So, there's just a lot of... lot of just different things that we're not completely sold on. We'd like to field, well, feel one his old and as recently bought by Microsoft and they are not supporting it anymore. And... and it wasn't cloud basically have a cloud solution, but it's not that didn't... didn't really kind of check all the boxes. If we're going to make a change, we wanted to have something a little bit more robust. So, so I'm looking at a couple of different ERP alternatives right now, and I think it was timely that want someone from your company called hours and they put it on my radar so that's how we're talking now?

SARAH

2:16 Hello?

SARAH

2:22 Yeah.

SARAH

2:36 Yeah. Awesome. We were built specifically for the commercial industrial. And so you guys are doing just strictly commercial service work. Is that right? Okay, perfect. Gotcha. And I think you put you had 40 service techs on the demo request. Is that correct?

PHONE CALLER #1

2:46 Correct service in projects?

PHONE CALLER #1

2:57 Correct.

SARAH

2:58 Okay. And are you, do you have?

PHONE CALLER #1

3:00 Well, 40 guys in the field, put it that way.

SARAH

3:04 Okay. So, how many of those guys are service timecard?

PHONE CALLER #1

3:10 Well...

PHONE CALLER #1

3:12 We take a lot of pride that we look a lot of guys from service the install and back again. So any of them can do call it a maintenance or service call. Yeah.

SARAH

3:21 They're cross.

SARAH

3:25 Awesome. Gotcha.

PHONE CALLER #1

3:26 All of them will have the app, put it that way.

--- Call Setup ---

SARAH

3:30 Okay. Got it. Cool. And Tony, do you happen to be end of the office today? My field rep, Clint. When he saw your demo request came in, he is the for California and he said he's actually heading back kind of near you guys later this afternoon and said that he would love to stop by and introduce himself or do you happen to be in the office?

PHONE CALLER #1

3:55 Yeah. Hold on one second. Let me look at my calendar real quick.

PHONE CALLER #1

4:11 Yeah, I've got a demo and a half hour, and then I've got a one o'clock after that, but I'm pretty open after that.

SARAH

4:20 Okay, cool. And it's the demo an hour long that you have.

PHONE CALLER #1

4:27 I'm sorry?

SARAH

4:29 Is the demo an hour long?

PHONE CALLER #1

4:32 Well, yeah. So I'm... I'm tied up till call it two o'clock...

SARAH

4:37 Okay, perfect. Yeah, I'll give him a call after this and say, yeah, if he can, and will you be in the office until five?

PHONE CALLER #1

4:47 Yeah, probably much later, but, yeah.

SARAH

4:50 No. Okay. Yeah, I'll call him and that, yeah, tell him to stop by. He'll be super excited and then I can get you, let's see. We can go ahead and get you on the calendar for a demo with Clint to he's pretty open tomorrow and Friday, what is it one of those days work for you?

PHONE CALLER #1

4:51 Yeah.

PHONE CALLER #1

5:19 Things are filling up pretty quick Fridays. No, definitely not good.

PHONE CALLER #1

5:34 I've got a two o'clock slot tomorrow.

PHONE CALLER #1

5:39 Two in the afternoon and that's about it. And then next week got a lot of traveling and stuff. So that will be kinda sketchy as well.

SARAH

5:47 Okay. Let me see. Yeah, I think click can do to tomorrow... and he might, yeah. And when he comes in today, he might be able to come back on site for an onsite demo, if that would be something you'd be interested in, but I can definitely go ahead and book it for two tomorrow for you guys. And I have your email at Tony. It in three H back. Dot com. Is that correct?

PHONE CALLER #1

6:13 Correct.

SARAH

6:15 Okay. And what?

PHONE CALLER #1

6:16 Yeah. So go ahead and send me an email invite on that. Get you on the calendar.

SARAH

6:21 Yeah, we'll do. Yeah. And if you can just accept it. So I know you got it. And then what's your role with the company Tony?

PHONE CALLER #1

6:30 Owner, president.

SARAH

6:32 Okay, perfect. Do you want me to add anyone else to the demo with you?

PHONE CALLER #1

6:38 Yeah, they'll be a few people. I don't know who else, but they're... they're probably just come into my office.

SARAH

6:45 Okay. Cool. And are you guys doing a lot of preventative maintenance?

PHONE CALLER #1

6:51 Yeah, yeah.

SARAH

6:53 Okay. And are y'all, tracking that through BuildOps right now?

PHONE CALLER #1

6:58 Yeah, and other means, but yes.

SARAH

7:02 Okay, perfect. And then what are you guys using for your accounting software?

PHONE CALLER #1

7:10 We have Quickbooks enterprise online.

SARAH

7:14 Okay. Gotcha.

SARAH

7:18 Okay. And yeah, what are a few things that would be important for you to see on the demo, Danny.

PHONE CALLER #1

7:25 Wanna see you're. Estimating module and how you go about generating estimates, proposals, and then how that's tracked through the job costing phase through invoicing as well? I see what you're real time.

PHONE CALLER #1

7:44 Costing is.

PHONE CALLER #1

7:48 Course, would be curious about the dispatch and.

PHONE CALLER #1

7:53 And also do is your work order or job, whatever you... you, your term you use. Is that the same number as a proposal?

SARAH

8:05 Hi, I'm not sure about that... that. The questions are clear.

PHONE CALLER #1

8:06 Did you?

PHONE CALLER #1

8:09 Okay.

SARAH

8:09 I honestly have no idea but I'll kind of, yeah, let him know all these things that are important to you and you want to see, and he'll definitely be sure to cover all that with you on the demo. Let's see. Are you guys, how are you all currently scheduling and dispatching your tax?



PHONE CALLER #1

8:27 To BuildOps?

SARAH

8:29 Okay. And then you are quoting and invoicing through Quickbooks?

PHONE CALLER #1

8:34 No, through BuildOps. So, everything happens through our ERP, and we just sync over to Quickbooks.

SARAH

8:37 Okay.

SARAH

8:40 Gotcha. Gotcha. Okay, perfect. Let's see. Okay, I'm gonna go ahead and email you over. Yeah, Google calendar invite for two o'clock Pacific Time tomorrow, and then, yeah, if you're accepted, you got it, and then I'll get quite a call right after this and tell him but yeah, you'll be in the office and free after two o'clock if he can start by.

PHONE CALLER #1

9:04 Okay. That sounds good.

SARAH

9:06 Alright, perfect. Hey, I appreciate your time and Clint always super excited to meet you later today.

PHONE CALLER #1

9:12 Alright, that sounds great. Thank you very much.

SARAH

9:15 Alright. Thank you. Yep. Have a good one.

PHONE CALLER #1

9:18 All right. You too.

SARAH

9:19 Alright, bye.

*The End*