



Call with J Hogan Refrigeration & Mechcl - Seth Charles

Scott Bartholomew with J Hogan Refrigeration & Mechanical
Recorded on 9/14/22 via SalesLoft, 12 min.

Participants

SERVICETRADE

Scott Bartholomew
SDR

J HOGAN REFRIGERATION & MECHANICAL

Seth Charles
Project Manager/ Service

Topics

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Transcript

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

--- Call Setup ---

SETH

0:00 Hello, you have reached Jerry Hogan, refrigeration and mechanical to reach Brenda, the cost or to place a service call style one-on-one...

SETH

0:18 J Hogan refrigeration. This is Brenda. How can I help you?

SCOTT

0:22 Hey, good morning, Brenda. This is Scott Bartholomew calm with service trade. How are you doing?

SETH

0:27 Good. How are you?

SCOTT

0:28 Doing alright. Just wanted to see if you had a minute to speak with me. I spoke with Seth yesterday on, if you mentioned it to you, I was calling with service trade. I said he would send you over an email. I was just wondering if you had a chance to take a look at that?

SETH

0:41 I just looked at it briefly. I really, I know we need to do something here. It's just, we're in the process right now of being bought out. So, I think that will take place like towards the end of the month. So we'll have to get with the new owner. Both Seth and I think that this is something we should definitely look into, but we will have to get with the owner and see if this is something that he would, you know, want to spend the money on. And then, you know, I've had a couple of different companies reach out to me so.

SCOTT

0:57 Okay.

SCOTT

1:19 Right.

SCOTT

1:25 Right.

SETH

1:27 You know, anything you can send us that has, you know, just any, I got the, I did watch the two minute video.

SETH

1:36 But like I said, there's you know, a lot of different things going on right now. And we definitely, my personal opinion is we definitely need to get updated with some kind have service trade or one of the, you know, BuildOps or I can't remember the other one that called. So, you know, as soon as we get this figured out and talk to new owner, then, you know, we'll definitely be in touch with probably a couple of years and see which one will fit out et cetera.

SCOTT

1:39 Yeah.

SCOTT

1:54 Okay.

SCOTT

2:05 Yeah, yeah, definitely. Brendan. And I totally understand where you're coming from with that. The reason I really from my call today was we set up these 30 minute demonstrations where it's not really any sales pressure or anything like that. It's just for you would meet with someone in our company, one of my territory reps and they would show you how the platform works and they are recorded. So if you just wanted to get on it, I don't know if you already know who the new owner is or if you want to like tag him minute, I could tag them in the email and then the Zoom link. And then that way you all can both be audited but it is recorded as well. So if you just you wanted to get on it and speak with him, and then they can show you the platform. And then if you wanted to share that again and like a board meeting or something like that to the new owner, and then y'all can go from there, that would work as well. But I just really wanted to see if you had some time available this week. I don't know what your calendar looks like.

SETH

2:15 Okay.

SETH

2:21 Okay.

SETH

2:48 Right.

SETH

2:56 Let me see. Tomorrow. I have to leave early. I have a appointment.

SCOTT

3:12 Pull up my calendar real quick while you're looking as well, it.

SETH

3:18 Simply... like, can we do Friday morning maybe at like 10? And unfortunately, I have a hard like I don't my computer doesn't have access to a camera or anything for a Zoom meeting?

SCOTT

3:34 Okay. Yeah, that's no problem.

--- Call Setup ends ---

SCOTT

3:38 As long as you can see their screen and they can show you the demonstration. I saw that really matters and y'all are able to communicate that way.

SETH

3:45 Right. Yeah. I don't even have last time I did one of these. I, we actually had to place a call and then they could, you know, and then I can watch it on the computer, so.

SCOTT

3:56 I hear you. So I do actually have a time this Friday at 10 a. M. Yeah, Eastern Time, correct? Or out of New York. Okay?

--- Call Setup ---

SCOTT

4:05 Gotcha. So actually I do have a time at 10 am with my rep, really dig in if you wanted to do that, but again, I'll block off an hour, but that's just the demonstration itself takes about 20 30 minutes in. The rest of the time is open for questions. So, yeah, I can go ahead and send that over to you what's a good email for you, Brenda?

SETH

4:04 Yep.

SETH

4:10 Okay.

SETH

4:19 Okay.

SETH

4:25 Mine's the same as Seth is just Brenda at J Hogan refrigerate calm.

SCOTT

4:40 Okay. And do you want me to tag Seth or I think Dan is the other?

SETH

4:43 He's no, he's actually off on Friday. So he, you know, we kind of talked a little bit about it briefly yesterday afternoon. So, so what I'll do is I'll get with you guys on this and then I, you know, I sat in on a couple of other ones.

--- Call Setup ends ---

SETH

5:01 So then I'll sit what's that and we'll kind of go over the different products, things that we're seeing because Seth is actually going to be managing this place. We're under a new ownership. He's going to be kind of the manager here. So, yeah. So it's going to be more his, him and I think than the new owner because the new owner, we just have to get it cleared that they're okay with us doing. Yes, I don't think they're going to care what program with Peg or whatever. You know what I mean?

SCOTT

5:15 Yeah, I remember him telling me that.

--- Next Steps ---

SCOTT

5:31 Yeah.

SETH

5:32 So, but yeah. So if we, you know, 10 o'clock Friday morning should work... and, you know, I'll...

SCOTT

5:39 Yeah, hello.

SCOTT

5:42 But, sorry.

SETH

5:44 So, I'll sit through this and then I can kind of compare it to the couple of other ones I've watched. And then as soon as, you know, everything gets straightened

around here, then Seth and I can sit down and re, look at all these and maybe do another one with him because he's more on the engineering end of it. We're a service end of it.

--- Next Steps ends ---

SETH

6:05 So, we gotta find something that's gonna kinda work for all of us.

SCOTT

6:10 Gotcha. So I, I'm about to send you the link. You said it was his, be our nda, Brenda gotcha. At J Hogan refrigeration dot com.

SETH

6:17 Yes.

SCOTT

6:22 Okay. I'm about to send you the link.

SETH

6:25 Okay.

SCOTT

6:27 And it's just through the, I tag set that in as well just because that was the contact I had. So he's just tagged in it, but he doesn't have to be there, like you said, but it is, he's on there as well, but yeah, it real quick. I know we spoke, I spoke with Seth and he gave me some information just to confirm you all are about four service techs right now.

SETH

6:33 Okay.

SETH

6:38 Okay.

SETH

6:47 Yeah.

SCOTT

6:48 Okay. And he said, y'all, were doing mostly commercial service. You know, what kind of like, you know, an exact percentage, y'all, were doing on the commercial side?

SETH

6:49 Yeah.

SETH

6:57 I would say commercial probably 85 percent and then the rest of it for the dental because we do install like the many splits and residential locations. So then once that's done, we, you know, we go in and do the PMS on them.

SCOTT

7:02 Okay. Perfect.

SCOTT

7:06 Yeah.

SCOTT

7:16 Perfect. Yeah. So service trade, Seth mentioned this to you saw the video yesterday, but we are designed for commercial service. One of the few that service platforms. It is actually built from the ground up for commercial. So I'm really glad y'all are taking a look at us just because we've I think we'd be a great fit. So, yeah, and let's see, are y'all on any kind of like accounting system right now. I know he mentioned you're using paper for like work where your tickets for y'all and like an accounting platform.

SETH

7:45 Well, so uses Quickbooks, which is actually.

SETH

7:50 I'm actually she's retiring. Hopefully, well, she's hoping by the first of the year, once the company is sold, I'm actually gonna move into her position, but I might be doing like if we do one of these programs, I may be due on a dual duty. I maybe service manager and counting slash secretary.

SCOTT

7:54 Okay.

SCOTT

7:57 Okay.

SCOTT

8:14 Okay.

SETH

8:15 So, you know, we're kind of still filling out because we gotta decide if we're going to fill my position or if we just need to get more like an office manager.

SCOTT

8:25 Gotcha.

SETH

8:26 Because I know what the other program, so I had looked at, they, the things automatically went into Quickbooks?

SCOTT

8:35 Yeah. So we have integration with Quickbooks. Are they integrate with us? But that's something that the ability will be able to talk with you about on the demonstration Friday. I can mentioned that it can mentioned that that's something that y'all have important to steal.

SETH

8:45 Okay.

SETH

8:50 Yeah, you know, but we don't you know, what talk into, so.

SETH

8:57 It's nothing that, what I know some of the programs that the guys can actually give the receipt or take payment right on job site. We don't really want that... want everything to come back to the office because we use different pricing for different customers and I know that can all be programmed in. But like sometimes a markup on a material depending on who the customer is, sometimes it's like a one point four or five. Sometimes it's a one point three depending the piece of equipment. So, you know, everything, all the invoicing still gonna have to go through me, but before it gets submitted to the customer.

SCOTT

9:36 Gotcha. So you want the invoicing to be able to go through the office before it goes out to the customer. You know, they'd be able to invoice from the field?

SETH

9:42 Yep. Yep. Yeah, we don't want them, you know, they can put all their information in and it come into Quickbooks and then I can review it and make any adjustments I need to do there. And then we'll mail it out or email at however, you know, our customers want him?

SCOTT

9:57 Okay. I can mentioned that to ability. Is there anything else that, you know, y'all are kind of looking for in a software other than just, you know, kinda updating some things, some processes. Is there anything like important they are kind of looking at right now?

SETH

10:13 Not really. I mean, I just like I said, well, I've only been here a little over a year, so this was kind of new to me when I stuff.

SCOTT

10:22 Okay.

SETH

10:23 And I think this the time, no, because it was retiring out, you know, and Seth and I are going to be kind of moving up in that position. So, if we're going to make any changes, I think now time to do it.

SCOTT

10:37 I agree.

SETH

10:38 You know, so that I, you know, my learning curve with living into because I've done accounting and stuff before. I just haven't used Quickbooks before. So as long as we're going to be moving in that direction, I feel now's the time so that I don't get trained one way and then have everything change after into something else.

SCOTT

10:58 Gotcha. Yeah. Yeah, I get that. It's probably better to get ahead of something like this before you run into any issues. So, yeah, and on that email that I send, did you get that? Just making sure?

SETH

11:04 Yeah.

SETH

11:07 Yeah.

SETH

11:13 I didn't...

--- Wrap-up ---

SETH

11:26 There it is. Okay. Yep. I got it.

SCOTT

11:27 Yeah. If you could just do me a favor, go ahead and click except on that. So that way of walks out the calendar for Billy.

SETH

11:30 Six seven.

SETH

11:34 Okay.

SCOTT

11:38 Perfect. Yeah, I'll give you a call that morning as well on Friday morning, just making sure we're still good. And if you have any other questions just, you know, we can kinda go over that and then, yeah, believe we'll have a presentation for you. It has to be able to answer any questions you might have. And I think you'll be a good fit. Like you said, you're doing mostly commercial that's what we're designed for, but I think we'll be able to meet the needs that you've expressed to me today. So, yeah, but I'm looking forward to hearing how it goes and I'll give you that call Friday morning. Thank you. Hi, Brenda. Have a good day.

SETH

11:42 Okay.

SETH

12:09 Okay. Sounds good. Thank you. Yep you too. Bye bye.

The End