



# Call with Cook Mechanical Inc - Jody Vowell

Alec Ashby with Cook Mechanical Inc  
Recorded on 9/5/23 via SalesLoft, 10 min.

## Participants

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

### **COOK MECHANICAL INC**

Jody Vowell  
*Director of Service*

# Topics

<i>Call Setup</i> .....	0:00
<i>Wrap-up</i> .....	8:35

# Transcript

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*--- Call Setup ---*

JODY

0:00 Good morning. This is Jody.

ALEC

0:04 Hey, Jody. This is Alec on with service trade. How you been?

JODY

0:08 I'm doing okay. How about you?

ALEC

0:11 Doing good, man. Doing good. Had a good three day weekend. How about yourself?

JODY

0:15 Pretty, pretty good. Also the same. Thank you.

ALEC

0:18 No worries, man. Well, anyways, the reason I was giving you a shout is I know you spoke to Pat last year, and then we kinda spoke for a little bit, but it seems like buying, you know, new service software kinda got put on the back burner.

*--- Call Setup ends ---*

ALEC

0:34 So I just wanted to reach out to you guys on the back line of this year to see if that was still something that you guys were considering, you know, getting off FieldEase and kind of, you know, moving to something a little bit more service specific or kind of where you guys are at, as far as looking at service software and stuff like that.

*--- Call Setup ---*

JODY

0:27 So...

JODY

0:33 Yeah.

--- Call Setup ends ---

JODY

0:46 Okay.

JODY

0:52 Yeah, we are surveying the landscape to see what's out there. We, we just did, we just did a demo on BuildOps.

JODY

1:02 And we'd like to do one for you guys as well. Well. I'll tell you what, send me an e-mail just a reminder. I'm gonna have to pull in some other folks with me on this.

ALEC

1:06 Okay. Sweet. That's exactly why I was calling. So... I guess when would you wanna do that and who would you want on that kind of thing?

ALEC

1:23 Okay.

JODY

1:24 But my e-mail is J vowel at cook mechanical dot com.

ALEC

1:28 Got you. I'll definitely put that in and I guess while I have you on the phone, I know last time you spoke with us, it seems like the user interface and the billing and the work order management? The mobile were some of the issues you guys were having with FieldEase. Computerease. What are kind of the issues you guys are going through now with it?

JODY

1:50 Same stuff.

ALEC

1:52 Okay. And how that affected your business? Is that delayed billing? Is that losing customers or what's kind of happened as ramification of those things or?

JODY

2:03 Yep. All that?

ALEC

2:05 Okay. Yeah, we'll definitely make sure that gets cut out. And then as far as your business, you guys are 100 percent commercial, right?

JODY

2:14 That's correct. Yes. Yeah.

ALEC

2:16 And then do you guys do like more PM, work more break, fix work?

JODY

2:21 Both, I mean, we are the CornerStone of our business is PM preventive maintenance.

ALEC

2:27 Wait. Okay. And then... okay.

JODY

2:28 Or service worth?

ALEC

2:32 And then, as far as, you know, I don't know what Pat told you last time, but a big part of our platform is like the deficiency or repair quoting workflow. Is that a big thing for you guys, like your technician reporting a repair, someone in the office quoting it out? Is that kinda common for your day to day?

JODY

2:40 Yeah.

JODY

2:50 Say that again, you broke up on me. I'm sorry?

ALEC

2:53 No, you're good. I was just saying that a big part of our platform. I don't know what Pat told you last time is our deficiency quoting or some call it repair quoting essentially?

JODY

3:04 Yeah, that is a big part of what we do. That is that's...

JODY

3:09 Pull-through business is vital for our service apart that without identifying those efficiencies and then pricing them up and getting a prompt quote back to the client that without that, we kinda get.

ALEC

3:27 Yeah. How's that going now?

JODY

3:29 It's going.

JODY

3:32 For manual... you know, spreadsheet driven.

JODY

3:40 Word word proposals and...

JODY

3:45 Work order tracking?

JODY

3:48 By, and we're doing a dispatcher at the moment. So, it's our service managers kinda trying to keep, the work order follow-up quotes done, and track everything, the parts hold stuff and it's kinda fragmented at the moment.

ALEC

3:52 Okay.

ALEC

4:06 Okay. Well, that's definitely like one of the major ways that we stand out from a lot of other platforms. Is that's probably like one of our best features. So, I'll make sure to go with that with you guys. Is Nick still the service manager over there? Is he still do that?

JODY

4:20 Hello?

ALEC

4:21 Nick, I believe last time, I don't know if he does something else, but I believe Nick, last time we spoke to you guys as the service manager, is he still your service manager over there? Is that someone else now?

JODY

4:32 No, no. Nick is not the service manager. It's a gentleman named Travis.

ALEC

4:39 Okay. Gotcha. Is Keith still there?

JODY

4:42 Yeah, Keith is account manager?

ALEC

4:45 Okay. Sweet. Yeah. So.

ALEC

4:48 Cool. And then I guess the last quick question, I'm sure you're busy, so.

ALEC

4:56 Is there anything else that's important for you as far as looking at a platform or, you know, features you guys really are looking for?

JODY

5:09 Yeah.

JODY

5:14 User friendliness. And...

JODY

5:18 Enhancing the client experience?

ALEC

5:22 Okay. Yeah, those are, you know, the client experience is definitely something in our wheelhouse and when you say that, what are you kinda thinking? Are you thinking?

JODY

5:32 In addition, well, in addition to that, being able to track the preventative maintenance contracts and keep track of equipment... activity by unit tag.

ALEC

5:49 Okay. Gotcha. Yeah, we can definitely do all those things. So, as far as the client experience, what are some of the ways you're looking is that the quotes is that post job reports? Like what are you kinda, what's like the main priority there?

JODY

6:03 What was the question? I'm sorry.

ALEC

6:05 Like when you say client experience and what ways are you looking to improve? It, is that like post job reports, quotes, invoices, like what's kind of the main thing you're looking for?

JODY

6:13 Yeah, yes, yes, all that, all of that.

ALEC

6:18 Okay. Yeah, I think you're really, your team is really gonna like what you see because everything you're saying or things were good at now, those PMS... is that done through spreadsheets now or how do you guys keep track of when those are due? What you're doing for those or?

JODY

6:37 Right now, we're doing, we have PM sheets that the text are filling out in the field.

JODY

6:45 And they're currently, they're handwritten forms, but we just converted them over to PDF forms on our... editable PDF forms on our iPad... but.

ALEC

7:01 Okay.

JODY

7:05 But yeah, we're still, it's still not.

JODY

7:10 Updating, you know, the customer database and it's just all kinda manually detached form. But we can, you know, they e-mail them after they're done with each PM, and we scan them and save them in job folders back at the office.

ALEC

7:27 Okay. And then how does the office know when they're due when they need to schedule? Is that through your system now? Or do you guys do that manually as well?

JODY

7:36 We have a separate spreadsheet that tracks that and has to be updated.

ALEC



7:42 Okay. And when it's not updated, are you guys just missing those or are you guys doing a good job of keeping track of those or how that's going?

JODY

7:50 Where it gets back burner. Sometimes when we're busy doing demand service, and yeah, it can be a challenge and sometimes it gets missed.

ALEC

8:01 Okay. Yeah. Well, Jody, I think we can definitely, I mean, the main things I always tell folks that we're pretty good at our, you know, managing the pull-through work... managing those PMS as well as... you know, kind of that client experience. I mean, those are definitely all things in our wheelhouse and tracking the equipment as well. So, I definitely think your team is really gonna like what you see. So, as far as you said you wanted me to send you an e-mail...

JODY

8:24 Okay.

--- *Wrap-up* ---

ALEC

8:35 Just want me to send you an e-mail or some times?

JODY

8:35 Yeah, I'm eating lunch, I'm eating lunch right now. So I'm eating lunch. I'm not at my desk. I'm not at the office. I'm eating lunch.

ALEC

8:43 That's fine. Yeah, I'll let you get back to it. I just was asking, do you just want me to send you some times and then you can just pick a time that work for your team?

JODY

8:52 Yeah, that'd be great.

ALEC

8:53 Okay. Sweet. I'll send that over right after this call. Whenever you get that, it'll be, it's just a little link. You just pick a time and then I'll just go to my calendar. Do you have any issues with it? And my e-mail my number is there. So feel free to call me and we can book it from there.

JODY

9:08 Okay. Well, do. Thank you.

ALEC

9:09 All right. Cool. Well, I hope you enjoy your lunch, Jody. And sorry, I forgot this question. Are you still at five techs or is that changed?

JODY

9:19 No, we have.

JODY

9:22 We have eight guys now, service manager, and.

ALEC

9:24 Okay.

JODY

9:28 Eight technicians?

ALEC

9:30 Does the service manager do work orders or is he just managing the text?

JODY

9:36 Managing the text. He doesn't do any of the actual... work in the field.

ALEC

9:43 Okay. Sweet. All right. Cool. Well, yeah, I'll shoot you over that e-mail if you could just pick a time sometime this week... that'd be great and then we can go from there. Does that sound good?

JODY

9:54 Yeah, sounds good. Thank you.

ALEC

9:56 Sweet. Well, thanks for your time and hope you enjoy your lunch and I'll probably go get some lunch myself too. So look forward to talking to your team, okay?

JODY

10:02 All right, man. Thank you. Bye.

ALEC

10:05 All right. Bye.

*The End*

