



Call with Terry Durbin

Brooke Caskey with Frontier Mechanical
Recorded on 3/6/23 via SalesLoft, 5 min.

Participants

SERVICETRADE

Brooke Caskey
Territory Manager

FRONTIER MECHANICAL

Terry Durbin
Service Manager

Topics

<i>Call Setup</i>	0:00
<i>Wrap-up</i>	4:06

Transcript

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

--- Call Setup ---

TERRY

0:00 All...

BROOKE

0:02 Hey, it's Harry, this is Brett from service trade. How are you?

TERRY

0:05 How are you?

BROOKE

0:06 I'm doing well. I wanted to check in with you guys. I gave Megan a call last week but didn't hear from her. I noticed that you guys hadn't joined our workspace that I built after our meeting with some of the resources and questions that we weren't able to answer online. So I wanted to get an update from you on where things are at.

--- Call Setup ends ---

TERRY

0:28 We're just still kind of exploring all options, kind of reviewing all the different platforms that we're looking at.

BROOKE

0:35 Okay.

TERRY

0:36 That's kind of where we're at, we're thinking.

TERRY

0:39 If we decide to make a move, if ownership decides, yeah, this is something we can pursue at, you know, implementing or starting it next fall.

BROOKE

0:49 Yeah.

TERRY

0:51 Now, we're...

TERRY

0:54 Somewhere here before we don't want to.

BROOKE

0:57 Yeah, no, totally. A lot of people are looking at next fall for implementation. What was kind of the, what was the overall feedback on service trade?

TERRY

1:02 Yeah.

TERRY

1:06 Works well. We like it.

TERRY

1:10 Yeah, we're just still kind of comparing it with the others and making notes and that's kind of just what we have right now?

BROOKE

1:17 Yeah. Well, to help you with your comparison, make sure you joined that workspace. I'll resend it to the three of you today, but there's a ton of information in there that I wasn't able to cover in our session.

TERRY

1:25 Sure.

TERRY

1:31 Awesome.

BROOKE

1:32 And so review that, and then you're able to leave comments within it too. If there's anything that stands out to your questions you have, but... in terms of next steps, what would you say? Makes the most sense? Does, do we need to plan on reconnecting TAM?

TERRY

1:39 Okay.

TERRY

1:46 I don't know how to get it may and we're kind of like I said, in the review, we've had a one internal meeting... Friday about reviewing. So we're kinda really in the infancy of investigating and stuff. So.

BROOKE

1:54 Okay.

BROOKE

2:03 Yeah.

BROOKE

2:05 Sure. How do you guys narrowed down, you know, your top pick as of now, I know you were looking at us and BuildOps. Is there anything else?

TERRY

2:13 Yeah. It's still kind of, I would say for me that I'm not the only person involved here but.

TERRY

2:21 You and BuildOps are the top two candidates right now.

BROOKE

2:25 Yeah.

TERRY

2:26 And then there was another one that we like, but I...

TERRY

2:32 Don't know we have some questions, so we just weren't sure about for some reason. So I rub, right that we can pin it down.

BROOKE

2:37 Right. Was that was Sam pro, right?

TERRY

2:41 That was what?

BROOKE

2:42 Was that Simpro?

TERRY

2:44 Yes, it was.

BROOKE

2:46 Okay. I remember Megan mentioning that.

TERRY

2:50 Right.

BROOKE

2:51 There, there was some interest, but some to be desired with them, but.

TERRY

2:55 Yeah.

TERRY

2:57 But other than that, that's kind of where we're at.

BROOKE

3:00 Okay. Well.

TERRY

3:01 And we don't really, we don't have any additional platforms that we're looking at above the ones we've already looked at, we looked at like I don't know six or seven platforms and, but yeah... they were really, yeah, if you have that sent it to me and we'll get in there and look and review again because we certainly want to get fair evaluation to everyone. Yup.

BROOKE

3:12 I'm there.

BROOKE

3:20 Yeah.

BROOKE

3:26 Yeah, absolutely. And just one more quick question. So, you mentioned that you're looking to implement new software in the fall? Makes total sense. I could pass the busy season, but when are you guys actually looking to make a decision? Because oftentimes with software purchases there's sort of a few months in between when you purchase and when you start implementing.

TERRY

3:46 Yeah, I would think it would come this winter sometime.

TERRY

3:51 But I don't have a date for you?

BROOKE

3:51 But...

BROOKE

3:54 This this winter as in the current winter that we're in. Okay. All right. I just wanna make sure I was like, okay.

TERRY

3:57 Yeah.

TERRY

3:59 Or, well, yeah, through the winter and the spring here. But, yeah, and then when summer, we won't have time to even look at it, but...

BROOKE

4:03 Okay.

--- *Wrap-up* ---

BROOKE

4:06 Okay. So you're hoping to sign something?

TERRY

4:09 Well, at least make a decision or where we're going. So that would be the hope whether that's reality, I don't know.

BROOKE

4:10 With this winter, yeah, yeah. Okay.

BROOKE

4:19 Sure. Absolutely. Well, hey, I'll send an email with the link. And then if you have any questions, give me a call back here, but I'll just check in with you guys periodically until we start like for next steps. If that sounds fair to you.

TERRY

4:24 Yeah.

TERRY

4:30 Okay. Sure.

TERRY

4:33 That sounds great. Thank you.

BROOKE

4:34 All right. Thanks, Terry. Have a great day bye.

TERRY

4:36 Thank you. Bye.

The End