



Call with Independent Mechanical Contractors Inc - Samuel Yuan

Mike Thomas with Independent Mechanical Contractors Inc
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Participants

SERVICETRADE

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SDR

INDEPENDENT MECHANICAL CONTRACTORS INC

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Project Manager

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Transcript

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

MIKE

0:00 Yeah. Hey, Sam. This is Mike from service trade. Did I catch you at a good time?

SAMUEL

0:00 Hello?

SAMUEL

0:05 Yeah, I'm just driving right now.

MIKE

0:07 All right. Cool. I know I spoke to you a couple of weeks ago and you kinda told me that you guys signed on with BuildOps. I did just get a notification for a demo request. Is that accurate?

--- Purchase decision ---

MIKE

0:18 Or is that a mistake?

SAMUEL

0:18 Yeah, yes, nope. That's accurate. I, I'm curious. I don't remember why?

SAMUEL

0:28 How many do you recall if we had a demo before?

MIKE

0:31 Yeah. Let me take a peek right now.

SAMUEL

0:35 You remember why I didn't like it or why we didn't move forward with you guys?

MIKE

0:39 Let's see. It says the last demo was 2018.

SAMUEL

0:45 That's why? Yup.

MIKE

0:46 So, it, were you there in 2018 still?

SAMUEL

0:49 Yeah, yup.

MIKE

0:51 Okay. Let's see it says.

SAMUEL

0:54 That was when we're first looking for our first software. So we ended up going with ServiceFusion at the time because we're a much smaller and we wanted something that was a monthly price, and that might have been why we didn't go with you guys to begin with. I'm, assuming your platform has obviously gotten a lot better over the years.

MIKE

0:59 Okay.

MIKE

1:14 Yeah. We've we've grown exponentially in the last four years. We've grown like crazy in the last year, we've acquired companies that, you know, we help even build proposals, and send out service contracts to win more agreements. You know, obviously software is always updating. So, you know, I would love, to get some time to show you what it looks like now as opposed to four years ago, you know?

SAMUEL

1:39 Yeah, that be, I think that'll be nice.

MIKE

1:42 All right. Let me set something up for you. So, how many? I got last time? You know, this is eight years ago or I'm sorry, four years ago. Now, last time it said you had eight techs, what are you guys up to now? Are you guys grown a little bit or what's that?

--- Pricing ---

SAMUEL

1:54 Yup. We're I think around 13 technicians and we've got.

SAMUEL

2:00 One, two, three, four accountants and myself as the project manager. We've got about, I think 13 to 14 technicians in the field. So we've got four accountants in the office and then myself as the project manager, we have about 20 people.

MIKE

2:04 I'm sorry, you cut out for a second?

MIKE

2:12 Okay.

--- Access to information ---

MIKE

2:19 Okay. So I'll let you know upfront that service trade only does licensing for the technicians that are using the mobile app. Every office user administrator. You guys are free.

SAMUEL

2:27 Yup.

MIKE

2:31 You can have as many people in that way as you want. So that 13 number put you with my direct manager.

--- Access to information ends ---

MIKE

2:35 Brett and I'll just, it sounds like you're driving or something that if you don't mind, I'll just spend like five minutes to just grab some notes for you and set you up a good time. If that's cool.

SAMUEL

2:44 Yeah.

SAMUEL

2:46 Yeah, sure.

MIKE

2:47 All right. Awesome. So, are you guys doing 100 percent commercial stuff or is there any residential stuff in there?

--- Type of work ---

SAMUEL

2:54 Zero residential. It's all commercial and industrial.

MIKE

2:57 Okay, perfect. That is absolutely perfect. 100 percent commercial and industrial. And is it, you guys have a lot of preventative maintenance contracts and, you know, active work or do you know how much of that is, you know, your business compared to like service calls when something breaks and you go out there?

SAMUEL

3:07 Yeah.

SAMUEL

3:15 So, I'd say in terms of revenue and whatnot, Construction is probably around like 70 percent and service is probably around 30 percent, but services obviously a day to day thing and that's where the most edits come from is from all the data.

MIKE

3:23 Okay.

MIKE

3:33 I gotcha. And those like those 13 texts. Do those 13 technicians that you guys have do a little bit of both? Like, you know, the service and Construction or do you have dedicated text for each side?

SAMUEL

3:45 There's guys are dedicated to service there's, text that there's like maybe one or two guys are dedicated to Construction, but the majority of our guys can do both.

MIKE

3:53 Okay.

--- *Paper process* ---

MIKE

3:55 Okay, perfect. Perfect. Yeah. All right. And you guys are on ServiceFusion currently?

SAMUEL

4:02 Yes, still on ServiceFusion.

MIKE

4:04 All right. What is what's making you guys look around? You know, what's the headache for you guys? If you had a magic wand, what would you like fix? You know, would it be tracking upcoming services or would it be work history? You know, the mobile app protect? What are you looking for?

SAMUEL

4:16 So...

--- *Parts management (inventory)* ---

SAMUEL

4:19 The biggest problem we have nowadays is purchase orders, managing a system that ties the materials that we buy from supply houses to when the work was performed, we have a lot of difficulty. So, we have four accounts in the office.

MIKE

4:25 Okay.

SAMUEL

4:43 Dealing with trying to match up materials used and purchase from our truck stock and from our inventory and from supply houses to the actual work orders. And so when we go to invoice work orders, it gets really difficult. There's a lot of guessing and digging.

MIKE

4:54 Okay.

MIKE

5:01 Yeah, yeah. I hear you. So attaching, you know, attaching part you're using whether it's off the truck of a warehouse or if you got to go, make a purchase to the invoice. So you get paid for what you guys are buying. I got you. All right.

SAMUEL

5:13 Yup. That, and mostly or prevented of maintenance, we have a bunch of maintenance contracts.

--- *Recurring maintenance* ---

MIKE

5:20 Okay.

SAMUEL

5:20 And we struggle, really bad to get them performed because we don't have a way of right now, we don't have a way of tracking.

SAMUEL

5:32 The contracts and work that's done on each contract and making sure that where the every customer on a monthly basis, we don't really have a tracking system for that. So that is another short.

MIKE

5:43 Okay. What do you guys use like you guys use like your accounting system to track what happened last year and then keep track of what's coming up?

--- ST app contracts and pricing ---

MIKE

5:50 That type of thing. Yeah.

SAMUEL

5:51 Yeah. Pretty much all we can do is we can run a hourly report, on the contract essentially because we treat the contracts as projects.

--- Accounting integrations ---

MIKE

5:59 Yeah.

SAMUEL

6:01 And that's the only way and only account have access to that and it's a nightmare to generate those reports.

MIKE

6:07 Okay. All right. What are you guys use for accounting? Is it like Quickbooks or Sage or something like that? Okay. Quickbooks desktop? All right.

SAMUEL

6:12 Quickbooks desktop.

MIKE

6:18 All right.

--- Type of work ---

MIKE

6:18 I mean, everything looks good. I'll brat will obviously do a little bit more discovering with you kinda walk you through our platform. Like what are you guys working on most? Is it, are you guys H back or is it kind of mechanical? Everything you could do, any boiler work, stuff like that or what's that? Okay?

SAMUEL

6:32 It's mostly refiguration, refrigeration is like 80 to 90 percent of what we do and then the remaining 20 10 to 20 percent is H fact, we don't do a lot of boiler work. It's a lot of rooftops.

MIKE

6:45 Okay. Rooftop units. I got you. All right. Perfect. All right.

--- *Type of work ends* ---

MIKE

6:49 Yeah. So let's get a I'll grab a good time for you. So you'll be meeting with Brett, like I said.

MIKE

6:55 And what are you trying to set something up for? What's your next week look like? Is there a day that you had in mind?

SAMUEL

7:01 I am pretty much open next week, I think.

MIKE

7:05 Let me take a peek, see when Brad's good.

MIKE

7:09 All right. So, next week, if you wanted to do something Monday morning, he's open or Tuesday afternoon?

SAMUEL

7:15 Let me check the calendar real quick.

MIKE

7:17 No problem.

SAMUEL

7:19 Monday morning sounds pretty good to me.

SAMUEL

7:23 Should it be like late morning?

MIKE

7:24 Yeah. What do you wanna do? Like nine 30, 10 o'clock or?

SAMUEL

7:28 10 would be good.

MIKE

7:29 10 o'clock yeah, I could throw you in for 10 o'clock right now. I'll have a Zoom link sent over to you. Is, is the best email for you?

MIKE

7:40 One independent mechanical? Dot com?

SAMUEL

7:43 Yup.

MIKE

7:44 Okay. All right, perfect. Sam. I'll shoot this Zoom link over if you have any trouble or anything like that, my contact info is in there. Feel free to reach out and we'll get you set up, you know, make sure you're in the Zoom meeting. Other than that, we look forward to meeting with you Monday and enjoy your weekend, Sam.

SAMUEL

7:56 Yep.

SAMUEL

8:00 That's good. Thank you very much. Another issue. We have to mentioned inventory tracking.

MIKE

8:02 Take care.

MIKE

8:05 Yeah. Okay.

SAMUEL

8:09 We struggle with that big time because we buy a lot of stuff. Technicians will buy stuff to leave to have on the truck. And then when we go to use it on a service, can we put on the work order? Our office personnel typically have zero clue where it came from and what the costs are, and it's a huge custom game for how much we should Bill our customers.

MIKE

8:30 Okay. I got you. All right. Perfect. I'll put that down too, and I'm glad, you stopped me from hanging up there.

--- Purchase decision ---

MIKE

8:37 I wanted to ask, I thought last time we talked, you said you guys signed with BuildOps and you were waiting to implement in the fall? Did something happen there? Or are you just trying to make sure you're...

SAMUEL

8:42 No, that's still, we did pay for the first few months of BuildOps implementation was really iffy... and we decided to postpone it?

MIKE

8:58 Okay.

SAMUEL

8:58 We have one of our accountants actually take some time off a whole month off during implementation. And then by the time that came around summer came, so we basically told them we don't wanna look into it until later in the year like October or November, but I will have my hesitations on BuildOps.

--- Access to information ---

SAMUEL

9:18 There are some things I don't like about it. Feel like there's a bunch of like work around like for example, we don't really have a dispatcher... our technicians dispatched themselves. So it's very critical. That is capability. And we...

--- Purchase decision ---

MIKE

9:14 Okay.

--- Access to information ---

MIKE

9:29 Okay.

SAMUEL

9:42 Companies that have... basically every service called technician cake is dispatched from the office and all the service calls come from the office, which is not the case with us right now.

MIKE

9:52 Yeah.

--- Purchase decision ---

MIKE

9:54 Okay. I'll be honest with you.

SAMUEL

9:55 So we are a bunch of workarounds that had to happen.

MIKE

9:59 Yeah, I'll be honest with you. I'm not sure how Brett will tell you to handle that. I'm not the professional and specialist with the actual software. So I'm sure he'll let you know how to do it. I don't know, you know, what it looks like for us on that end, but, yeah, I mean, I had to ask, I don't want to talk bad about any other company I'm not in that, you know, I'm not in that game, but I have heard before the implementation with BuildOps could be rough. So, I was just curious about your experience and what you guys are going through.

SAMUEL

10:12 Yep.

SAMUEL

10:27 Yeah, it was just a big learning curve. Obviously, we've been dealing with our system for years now and then whenever there's a big change there's, always a lot of hesitation.

MIKE

10:37 Yeah, obviously.

MIKE

10:40 That's that's expected for sure. But, you know, I look forward to setting you up with Brett Monday.

--- Purchase decision ends ---

MIKE

10:45 Hopefully you like what you see and if not, you know, at least you did your exploring, and you have, your research done, you know what I mean?

--- Purchase decision ---

SAMUEL

10:40 Yeah.

--- Purchase decision ends ---

SAMUEL

10:46 Yeah.

SAMUEL

10:52 Yep. Sounds good.

MIKE

10:53 Alright. I appreciate it. Sam. We'll talk to you on Monday, have a good weekend.

SAMUEL

10:55 Yep. No problem. Thank you. Bye.

The End