



# **Call with Western Mechanical Contractors, Inc. - Karen Noel**

Jace Stephenson with Western Mechanical Contractors, Inc. (WA)  
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## **Participants**

### **SERVICETRADE**

Jace Stephenson  
*SDR*

### **WESTERN MECHANICAL CONTRACTORS, INC. (WA)**

Karen Noel  
*Chief Financial Officer*

# Topics

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# Transcript

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

JACE

0:00 Hey, Chad, this is Jace from over at service trade. Did I catch you with a minute of time today? Sure. Okay, awesome. I'm not sure how familiar you are with service trade. I know my counterpart, Susan Warren had been in contact with you back in October about us, but we're the software platform that's you know, specifically designed for the commercial service contractor. So, I wanted to, you know, give you all a call today, see, you know, how you guys are currently operating or a bit more about it and see if service trade might be something that you guys are interested in looking at, no.

KAREN

0:01 Hello, this is Chad.

KAREN

0:08 Sure.

KAREN

0:21 Huh.

KAREN

0:28 Huh.

KAREN

0:37 No, not at this time. It was when I was doing the inquiry, they were just saying, well, we'll let you know if you're a fit for us.

*--- Type of work ---*

KAREN

0:46 And when I got that e-mail I'm going well, it doesn't seem like you really wanna work with us all that much. So, I would rather not. Yeah, so.

JACE

0:46 Hello.

JACE

0:53 Well, and, I might be able, to give you a little bit more background on that. The reason why, you know, we say, you know, if you'll be a good fit for us is just because we deal specifically in the commercial industry, you know, with people who are doing, you know, mostly, you know, PM agreement, service contracts, you know, deficiencies out in the field, things like that. So we just like to...

KAREN

1:11 Huh.

KAREN

1:21 It was just that poor choice of words.

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

KAREN

1:24 Let's put it that way when that e-mail came out and I'm going really that's what do you wanna look at that's? Not right? Yeah.

JACE

1:26 Yeah.

JACE

1:30 Yeah. Well, I am sorry about that... and I mean, yeah, I agree with you, that it could have been worded a bit differently, but that's just kind of, you know, some intel on why it was said that way just because, you know, we like to make sure that, you know, we're not wasting anybody's time.

--- *Accounting integrations* ---

JACE

1:51 So, you know, if we aren't a good fit for each other, we definitely don't wanna waste your time, but, you know, are you guys working in the commercial space?

KAREN

1:41 Okay.

KAREN

1:53 Yeah.

KAREN

1:57 Yeah.

KAREN

2:00 Yeah, we are. And we're working with right now, another software vendor to... what they're doing, is they're integrating Foundation?

JACE

2:09 Okay. Yeah.

KAREN

2:12 So, they're we've been working with that.

JACE

2:15 Okay. Do you guys use foundations then, or is it a different software?

KAREN

2:19 Yes, no, we're using Foundation as we're right now, we're using it for our service platform and our...

JACE

2:21 Okay.

JACE

2:26 Okay.

KAREN

2:30 Accounting. And then we're using rake in as our projects... side. And the software that we're looking at is, can integrate our projects and our service all in one and be able to provide the information back into Foundation. So, we've been working with this company for a couple of years. And so we're trying to find, I didn't know if there may have been another company that's already gotten this figured out to where they can actually integrate everything that we need into it.

JACE

2:31 Yeah, yeah.

JACE

2:40 Huh.

JACE

2:53 Okay.

JACE

3:01 Yeah.

JACE

3:06 Sure.

KAREN

3:08 And that's what our goal is. We don't want to do duplicate entries into the other system.

JACE

3:12 Definitely. Yeah, yeah, no, I definitely get that. And, and that's kind of our model as well. We wanna stay away from that double data entry as much as possible. And we do, I mean, we also have a partnership with Foundation. So we're able to integrate in with foundations as well. We have quite a few customers that, you know, have been successful with that. What, what was the software that you guys are using?

KAREN

3:25 Hello?

KAREN

3:34 BuildOps?

JACE

3:37 Okay. Yeah, no, definitely. Familiar with them, and you guys, I assume then, you know, if you've been with them for a couple of years, you guys are in on a contract with them?

KAREN

3:48 We are on a contract. We're not currently using the system yet though.

JACE

3:53 Okay. Definitely makes sense.

KAREN

3:54 So that's where we're that's where we're at, we haven't gone live with this thing yet. So, it's been about a year and a half, I think. And if there was a company that had the integration that they've already worked with now, are you just using the simple?

JACE

3:59 Okay.

JACE

4:03 Huh.

KAREN

4:10 Import export that Foundation provides or is there other things that you're...  
importing exporting as well?

JACE

4:13 Yeah.

JACE

4:20 That is a fantastic question. Do you mean that as far as like the communication between service trade and foundations as far as like, you know, getting like work orders and things like that transcribed between the two?

KAREN

4:35 Yes, for putting in, well, not for the, so where it's transferring the information for, the POS, it's transferring the information for, the jobs that are there. It's being the jobs are being cost Ed. So everything all reports can be pulled from Foundation. And so what we're doing is we're using, the other software platform for the project management side. And we're also using it for the service side where we're able to see here with Foundation, you can't put in videos. It's it's not, it's very clunky on the service side.

JACE

5:01 Huh.

JACE

5:03 Huh.

JACE

5:11 Yeah, it is. Yeah, I agree with that.

JACE

5:17 I will say, and I apologize for this. I am not the end, all be all, when it comes to accounting, I do know that we have a very strong partnership and a very strong integration with Foundation and, you know what exactly that looks like. We actually have, you know, a member of our team that's completely dedicated to our accounting integrations and talking that over with you. So, you know, I'd be more than happy, yes.

KAREN

5:24 Huh.

KAREN

5:40 Is that something that you can, we can instead of talking it over if, because what we need is we need to know exactly what you can import and what you can export, if you can provide that information in that one, you can do all of this.

--- Accounting ---

KAREN

5:56 So.

JACE

5:45 Yes. Yeah.

KAREN

5:58 So, what we have is there's U, DFS, they are in Foundation and not that information like the, we need to know within the system, I don't know if your system has it where we need to know when a...

JACE

6:01 Huh.

KAREN

6:14 A Coi is expired. We need to know that.

JACE

6:16 Okay.

--- Accounting ends ---

KAREN

6:19 Licensing, what else to just a second here? I got my accounting lady here that knows a lot more than I do here. Cherry, what is it that we're trying to pull from our vendors?

JACE

6:20 Okay.

JACE

6:26 Yeah.

KAREN

6:33 From, if we have the other software in the Foundation, I know that we need to know the Coi dates.

KAREN

6:39 Is there anything else that you can think of right away?



KAREN

6:43 I thought there was three things that Karen was looking into.

--- *Type of work* ---

KAREN

6:48 Okay. Yeah. So Cherry doesn't know, the CFO is out of the office right now that where I could just quickly answer that for you, but I, I'd be good to find out exactly what you're able to pull and then what to pull from Foundation. Well, it's more of an import at that point because we're doing everything through your software and it's being imported into Foundation.

JACE

6:46 Okay.

JACE

6:55 Yeah, no worries.

JACE

7:01 Yeah.

JACE

7:07 Yeah, no, yeah, I definitely, I get that there. That's a great question and definitely one that I can, you know, ask my manager about and, you know, get back to you on, and I know that you mentioned, you know, projects and things like that. How long are your projects typically lasting?

KAREN

7:31 They go about a year and a half, I think is our longest one that we've been on maybe two years. Yeah.

JACE

7:38 Okay. Do you guys do any like, you know, shorter projects or are they all those long projects?

KAREN

7:43 No, we've got three different divisions. We've got our major projects, which are those our shorter projects which we call our special projects group.

--- *Pricing* ---

KAREN

7:53 So those could last up to maybe three to six months, something like that depending on it depending on the dollar size. So, if we're looking at about 100 K,

something like, that would probably go to our project special projects group, and then we have our service group.

*--- Type of work ---*

JACE

7:46 Okay.

*--- Pricing ---*

JACE

7:53 Hum.

JACE

7:57 Okay.

JACE

8:00 Yeah.

JACE

8:08 Yeah.

JACE

8:10 Yeah.

KAREN

8:10 And we're running right now, probably 50, I think 54 people between... in office and then out in the field.

JACE

8:16 Huh.

JACE

8:20 Okay. How many do you have out in the field?

KAREN

8:25 Out in the field?

KAREN

8:28 Probably.

KAREN

8:32 I'm thinking around 42.

JACE

8:35 42, and then are they all doing service or are some of them constrained? All of them? Okay?

KAREN

8:36 Yeah.

KAREN

8:40 No, they're all over the place. Yeah, I've got right now, I have... five service, three special projects... and then the rest are Foreman and...

*--- Type of work ---*

KAREN

8:54 On the major project side, and then workers.

JACE

8:57 Okay.

JACE

8:59 I'm just making a note of that there.

JACE

9:05 Bounce that out. Yeah, I definitely think, you know, I don't know, I was kinda looking through some notes on your file here.

*--- Purchase decision ---*

JACE

9:12 I don't know if you guys ever, you know, ended up sitting down and taking a look at a demo with us, but, you know, based off of everything that you're telling me here, I think that we'd be a great fit for each other and I apologize for, you know, any miss step, that had happened in between there.

*--- Implementation and ongoing support ---*

JACE

9:29 And I know you said that it's been, a year and a half with BuildOps trying to go live. And I'll say for us, no, no shade towards them at all. You know, every software is different but, you know, we have a 30 to 90 day onboarding process, and you're up and live.

--- Accounting integrations ---

JACE

9:46 So, you know, some people take a short as 30, some people take 90. So, you know, we definitely be able to get you going a lot quicker. So, I think, I mean.

--- Implementation and ongoing support ---

KAREN

9:34 Okay.

KAREN

9:39 Huh.

--- Accounting integrations ---

KAREN

9:46 Yeah.

KAREN

9:52 Yeah.

KAREN

9:54 Okay. Well, this is where, the biggest problem was, is the integration to make sure that everything is being integrated to where we're not having to do the double entry. And so they've been jumping through hoops because Foundation doesn't actually provide some of this integration process. Now, you got a lot of contractors, that are using one software where they're probably doing the double entry or to get some of these reports and we don't want to do that.

JACE

10:12 Okay.

JACE

10:20 Yeah.

JACE

10:23 Okay. Yeah, I will. How about this chat? I will get with my manager, I'll find out a bit more about that integration and we'll see if it's what you're looking for and then I can follow back with you if that's all right?

KAREN

10:35 Yeah.

KAREN

10:38 Okay. That's that's great. Or if you can just send me over what you do, if you're just using the... because Foundation does have?

JACE

10:40 Okay.

KAREN

10:50 An integration tool that you end up taking that information then from a...

KAREN

10:59 An excel sheet... and then you throw it into the back into the system Foundation. So... that's what I'm thinking that you guys are using. But right now, we've got, so, BuildOps is working on something where we're using additional, they're going through some additional steps, making their own integration type package to where they can integrate more back into Foundation for us.

JACE

11:01 Hum.

JACE

11:04 Hum.

JACE

11:12 Hum.

JACE

11:31 Okay. I'm making a note of that.

JACE

11:36 Right. Well, it sounds like from there, you'd prefer if I sent you the information that I find over e-mail...

JACE

11:44 Or do you want me to?

KAREN

11:44 Yes, for right now, this way, it's not, we're not going back and forth. It allows us to analyze what your guys are... pulling in from your software and putting it in the Foundation, for our information.

JACE

11:53 Yeah, absolutely.

--- *Accounting integrations ends* ---

JACE

11:58 Yeah, absolutely. Absolutely. Well, I will check into that, but I definitely appreciate your time today chat, and, you know, taking the time to speak with me, it's been great hearing more about it and I'll get that over to you just as quick as I can.

KAREN

12:04 Huh.

KAREN

12:11 Okay, wonderful. Thank you very much. Okay. Yeah, you too. Bye.

JACE

12:13 Awesome. Of course, have a great rest of your day. Thanks chat. Bye.

*The End*