



# **ServiceTrade/Legence - Introduction to New POC**

Lauren Rice with Legence Holdings  
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## **Participants**

### **SERVICETRADE**

Lauren Rice

*Director of Enterprise Sales*

Tim Spink

*VP of Outside Sales*

### **LEGENCE HOLDINGS**

Kris Rushing

Mike Fisher

*Executive Vice President, Service and Safety*

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# Transcript

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LAUREN

0:00 Hey, Mike, can you hear me?

MIKE

0:01 I can, how are you?

LAUREN

0:03 I'm great. How are you?

MIKE

0:05 Good.

LAUREN

0:09 What are those creatures in that picture, this deer or bison?

MIKE

0:14 I got a weird camera then on. Yeah... whipping those a, those are bison. That is E... where is that? That's the Madison river as it comes out of yellowstone park?

LAUREN

0:33 I love, that is kind of my spirit animal.

MIKE

0:38 Wow. What is?

LAUREN

0:39 That we actually, we go to Catalina theremel. And when my daughter was born, we decided we would decorate her room with bison. So, we have a whole bunch of bison going on in our world. So, whenever I see when I get really excited, not just because they're the national animal of the United States.

MIKE

1:05 Ever out of beisenburger?

LAUREN

1:07 I have, yes, they're very delicious. I had one when I was in South Dakota last year, yeah.

TIM

1:14 Pretty good.

LAUREN

1:15 Yeah, some.

KRIS

1:16 Pictures in our kitchen but, we're not eating bicycles.

LAUREN

1:21 You can get the bison meta, just like almost in a grocery store. So, well, at least I can, I don't know about in Pennsylvania. Is that where you are Chris?

KRIS

1:33 Yeah.

LAUREN

1:34 Yeah, I might be a California thing. I don't know. Hey, Tim.

TIM

1:38 Hey, how's it going? Hey, Ela, how are you?

LAUREN

1:45 Well, thank you. Thank you all for joining and Chris, it's good to see you again. It's been a while. We just, we just saw each other yesterday for San Jose boilers handoff call to our customer success team. So, yeah, I, we've had some shuffling of folks. So we're at service trade and so have you all over at Therma and legions, I know there's been a lot of permissions going on. So I wanted to reintroduce you all to Tim spink who's our VP of strategic accounts. Is that right? Tim? Yeah, we're all kind of getting to know each other's new roles. But, but yeah, I wanted to introduce him to you all, Mike and Chris because Tim will be taking lead on the regents project from the service trade perspective... really more from sales. Like Jennie and John Baker are still gonna be involved on the customer success side of things, but wanted to get everyone in the room to do introduction and then kinda get an update from you, Mike on how you feel things are going at Therma... read potentially as well how that transition is going with.

--- Purchase decision ---

LAUREN

3:07 So call and then kinda determine, I know from what I understand there's like a committee Mike, that you're heading up as well. So I just had a couple of things to

kind of chat about that would love to get sort of a state of the union from you, Mike and Chris... and then kind of go from there. That sounds.

*--- Purchase decision ends ---*

MIKE

3:28 Sure. Perfect. Let's see. So why don't, we, we'll start with kind of the thermidor cow pilot... Chris. I have not checked with Tom in the last couple of days last weekend. He was supposed to get the last PMS entered so we could start really doing some dispatching. I.

KRIS

3:53 He just sent it like this week, to Johnny. I think it was probably like two days ago. So that is what's been holding up the roll out for our pilot even though we went live in mid November, getting all the recurring services and put it in. There has been a manual task and that task has fallen on really one person who has been transitioning to a new role.

*--- Paper process ---*

KRIS

4:16 So it's like he's doing this while getting started. So anyway, it's on top of it just being long and tedious. It's it's if he's juggle that, with a new assignment. So it's in and that has been, I think the key thing that's been holding back our service texts from actually using it is because people aren't dispatching from it.

*--- Paper process ends ---*

KRIS

4:39 So... now I think the plan is okay. Let's start dispatching jobs in January for this pilot with those four, five high priority customers. And so we're waiting to hear feedback there. But I'm going to connect with, the new head of our service department on that.

LAUREN

4:58 Who's who's the new department head?

KRIS

5:02 So that mark?

LAUREN

5:06 Right, right.

MIKE

5:07 Yeah. So Lauren, just for, you and Tim, so I think it was one one, we did some shuffling as well. I was actually still wearing the kind of call it the service ev a hat as well as the service hat. And I officially made that hand off to mark propel, who was our service operations manager. So plumbing hvac chillers and tab report up into mark now and then like Chris said, Tom whittle is moving into allegiance role and think we're calling him a director of cross south west or something like that. A mouthful. And Dela, san Java who was one of our senior preventative maintenance account managers has been promoted into Tom's role. And on the op side, the Doug Schmid was promoted into mark spot... that was service operations manager. So the way the responsibilities are kind of delegated with the mechanical service team is... you know, two separate departments. So let's call it two separate groups within the department. We've got service sales, which is now led by Della. And then we've got service ops, which all the field and the project team, the service project managers report into Doug. Now, Doug's previous role. He was a service operations or a service project manager. Prior to that, he was one of our area group supervisors. He managed the south bay technicians.

--- *Purchase decision* ---

MIKE

7:25 And then of course, prior to that, he was a technician. So he's a field guy like mark list. So, we made those changes on one one.

LAUREN

7:37 Great. Yeah, we did the same. We, we had, some moving around to fit. I don't know everyone. Obviously, I know Tom and mark. I don't believe that I've met Dela or dog. So I'd love to meet them next time we're up that way. Are they, are they pretty hands on with the pilot that's going on? Are they pretty aware of sort of the initiatives, with what you're hoping to accomplish with ServiceTrade and are kind of working towards this.

--- *Purchase decision ends* ---

MIKE

8:10 I'd say Dela is... clued in on what we're doing with the preventative maintenance side... and I think Doug needs to come up to fully come up to speed on it.

LAUREN

8:26 Okay. Is there anything that team service that can do to help with that? I know Jennie is still engaged and John will be moving forward with San Jose boiler which now kind of rolls up under your purview as well, Mike. But can we do anything proactively to help get dug up to speed? Like a meet and greet call? Like what would you suggest?

MIKE

8:50 Yeah, I think that would be a good place to start just meeting all. And, I would include both of them, Ela, and Doug. So we're keeping things consistent.

LAUREN

9:07 And...

MIKE

9:08 Then, you know, talking about... the initiative or, we call it a charter... that Chris and I, are leading. And essentially, we're doing a... an evaluation of the, of three separate service solutions, ServiceTrade. We are the other two ServiceTitan.

KRIS

9:40 Service tighten, BuildOps, and then, you know, the incumbent solution.

*--- Accounting integrations ---*

KRIS

9:44 So whatever each business unit is using in their site. And I've also heard of an additional one called coins that's new to me.

MIKE

9:54 We don't like coins.

KRIS

9:56 Okay.

MIKE

9:57 I've looked the points I looked at their whole year unless they've made some not changes. I don't know how that would work anyway because it's part of a big ERP system.

*--- Accounting integrations ends ---*

TIM

10:09 Yeah.

MIKE

10:10 Yeah. I out, I think that would be a little bit of a wasted effort. But... so, understanding, our structure, you know, we've got, you know, multiple business units that report into the legion C suite... which is, you know, Steve Hanson, Jeff sprout, CFO, chief accounting officer, et cetera. We, we also have Terry Keenan, who is chairman of our board. Terry comes from a service background. He, he has certain criteria that he wants to make sure that whatever solution we end up with meets. And, you know, part of this charter is just making sure we're checking the boxes during... you know, the evaluation period, and then we'll be making a recommendation for the service solution for all the other solutions delivery business units.

KRIS

11:17 We're going to involve them in the process. So they've been getting involved now with creating the criteria. So, Lauren, you've seen a draft of that criteria. And since then we've been adding and modifying that. So we want to make sure this is an inclusive and collaborative process with the other business units. I don't want them to feel like a solution is being pushed down onto them where it might not be the ideal solution for their geography or where their business is set up. So we want to make sure they feel like they're part of the process. So what that's gonna entail is us basically, we're gonna share this plan next Tuesday, with the leadership team. And then we'll be... doing some working sessions with the other business units, the service department specifically... working through the plan, making sure that everyone's good with, the evaluation criteria we're using and how we want to structure the timeline? And then we're going to start the evaluations, of the different groups. And so obviously we've got you guys going on with a Reed in our southern California business and in san say, boiler... and then we'll do the assessments with the basically incumbents and then some demos with the other vendors. We look to wrap up that business case around the beginning of April by business case. I want to be able to say, hey, under the old system, this was, the quote to cash cycle time.

--- Paper process ---

KRIS

12:54 This is how much time text we're spending doing these kinds of steps, these kinds of processes like, you know, entering their time cards, for example, and we want to be able to show it clear like before and after. So we can quantify the benefits of the new system versus the old.

--- Paper process ends ---

KRIS

13:10 And that's what we mean by... partially what we mean by business case. And then, you know, we'll look to refine that recommendation going into our board meeting, in may.

MIKE

13:24 Yeah. I think it's worth mentioning also in that list is gonna be the KPI reports that each business unit needs to run, their separate groups?

LAUREN

13:38 Do you feel that kind of reading between the lines? Each group because, you all do operate independently. Do you have separate specific KPI'S that are important to each market? Or is it gonna be consistent across the portfolio?

MIKE

13:54 It'll be consistent?

LAUREN

13:56 Okay. All right. That's...



MIKE

13:58 We actually develop this, the KPI list a couple of years ago and it's since been tweak, but, when we were going through the selection process for ifs, so it's pretty much, you know, it's very similar to the original list but with some tweaks.

KRIS

14:19 So, in addition to all the evaluation criteria, we've also got a list of KPIs too.

LAUREN

14:24 Sure. We'd love to take a look at that and make sure that, we set you guys up with those KPI specifically a Reed since they already have ServiceTrade kinda get those report, and the reporting functionality kind of get those reports kind of captured for them. Is that something you'd be able to provide?

KRIS

14:45 Yeah, I could provide the KPI.

LAUREN

14:48 Okay.

TIM

14:49 And the other thing we can do too. I just went through the same exercise with a large fire organization, 1,000 plus X, and we gave them sort of our benchmark ones, right? Sort of the things that we see in the industry mechanical or what they're measuring. So we can provide you that as well. And again, not to say that we know everything but again just, it helps, right? Point out, where everybody else is measuring the business.

MIKE

15:16 Yeah, that'd be really helpful.

TIM

15:20 Yeah. I was an I opener to say last... it.

LAUREN

15:27 I'll write that down.

LAUREN

15:33 I feel like I've been doing a lot of the question of being like Tim. What questions do you have, for these folks since you're kind of newer, to lead?

TIM

15:43 I mean, the big one was what they just talked about is criteria, right? I mean, clearly at the end of the day, you're right? That's what we care about too is, you know, we're the best fit because we can help you meet your KPI'S and help your business, you know, meet the goals you've set that's what we're after, so.

MIKE

16:03 Perfect.

LAUREN

16:04 Thankful. Adams.

TIM

16:05 Neither one of us had time to waste, right?

LAUREN

16:07 No, right?

MIKE

16:11 Our main point of contact going forward now is Tim, right?

LAUREN

16:17 That's correct. Yeah. I told him he wasn't gonna be able to get rid of me completely and he wouldn't want to just because I'm based on the west coast, Tim is on the east coast. We or we, we've worked very closely together. I mean, since I started at ServiceTrade, so we're going on eight years of working together. So we were pretty much locked up at this point, but yeah, Tim will be the main point of contact. I'll kind of provide oversight from a west coast perspective and kind of stay... keep a close eye on, the onboarding projects, thermo norcal, San Jose boiler to some extent are, but they have an account manager, that spends more time with them than not.

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

LAUREN

17:05 So, so, yeah.

TIM

17:07 Yeah. To Lawrence point. I mean, what we're changing out this year is strategic accounts are extremely important to us and then they typically just need more resources, different resources.

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

TIM

17:17 I said here, the CEO sits next to me so it's easy for me to say, hey keep genie on that account, right? Because, you know, we may say that she's just too important. We got to keep on this the things like that. And again, just from a bigger scale, it just gives us the ability, to meet your needs because what you guys need is different than a 10 tech shop. So that's it... all right?

MIKE

17:42 Good.

LAUREN

17:44 Well, I think I wrote down as action items and Chris, you and I can share notes because I know you're good at this too. I can set up a meet and greet call with deli and Doug. It'd be helpful Chris to get that KPI list so we can cross reference that with our like suggested KPI list and then kinda get that set up in the a read account in their reports.

--- Purchase decision ---

LAUREN

18:09 And then... from a timing perspective, you, I took some notes and you were saying that... the goal is to wrap up the business case by beginning of April. I think we'll probably be talking in the next couple of weeks or so with that meet and greet, and then kinda determine what involvement we need to have in the business case piece of things.

--- Purchase decision ends ---

LAUREN

18:38 I'll continue working with San Jose boiler and John Baker on that side of things. But is there anything that I missed?

KRIS

18:47 No, no, I don't think so. What I'll do is I'll reach out to Doug and Dalia, just to say, hey, fyi, we're going to read you in on this project, and the pilot and... basically, our plan going forward, and then, yeah, you can set up a call. So let me do that.

LAUREN

19:09 Okay. That sounds good.

MIKE

19:11 Chris, make sure I think to have that conversation with mark first. Okay? And then, yeah, just courtesy, right? So he's in the lot. Yeah.

KRIS

19:23 And I'll kick over the KPI list to you.

LAUREN

19:28 Tim, one thing I know you like to do, is have like calls on a regular cadence just to... kind of stay in communication. Is that something you'd recommend for this group?

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

TIM

19:41 Yeah.

MIKE

19:42 Okay.

TIM

19:44 Yeah. I mean, a cadence two week cadence, one month can, how cadence or we think... you know, for you for your team as well... we wanna set that up narrative we want to do it post after we have the initial call with Talia and Doug.

KRIS

20:01 I think... initially maybe for the first two months like a biweekly cadence would help, I'll propose that to them and not that I, we can just, maybe we can decide after two months whether to move it to monthly. The reason being I want them to know what usage looks like.

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

KRIS

20:25 I want them to be aware of what adoption has been and where we are and are not using the system because it's been, you know, it was under utilized for a while and no one really knew what the utilization level was or why. And so it was kind of not on the radar. I would like to keep it in front of mind for them.

TIM

20:42 Yeah... I agree. Good ideas.

KRIS

20:45 Able to say, hey, you're only dispatching this many jobs, only this many texts you're using it and they're only using it for, you know, there are some texts you a, who could do their entire jobs from that, but they choose not to. And so we won't to understand what, what's driving them.

LAUREN

21:02 Right.

MIKE

21:02 And a Tim for kind of background purposes. Yeah... you know, we were on a kind of a homegrown system that we call twixts yeah, and twis mobile. And then we went live with ifs, yeah, failed miserably just tech adoption. It was us, it was just not a good solution for us. So to stabilize... and, this is, I think where we're seeing a lot of the delay and under utilization, we had to pivot back to the legacy system and stand that back up. We did that about the same time we were trying to go live with ServiceTrade. So, you got texts that we're working in the old system. They were comfortable text that we're now struggling in a new system. And then, we had to make some changes to the legacy system so it would plug into ifs. So there was a learning curve there, and at the same time, we're trying to push out service trade. So the, you know, it's been definitely a challenge for the texts.

--- *Paper process* ---

MIKE

22:13 And it's also still a huge challenge for, you know, the office support folks because we're still trying to play catch up on our buildings. We still got, you know, issues with work tags. We still got, I mean, it's still... it's been right. So.

TIM

22:35 Lot of duplicate work going on and you're trying to, yeah, I get it, right?

--- *Accounting integrations* ---

TIM

22:39 Trying to figure out what the right solution is going forward. And yeah, got it. And then that was on Sage 300. If I remember, right? Twist. It was Sage. 300 was the ERP? Not that it matters but.

MIKE

22:52 No, it was a, it's a homegrown. We just call it the HP. It was a, yeah, self built program. Yeah. All right.

--- *Accounting integrations ends* ---

MIKE

23:04 I think some of the other guys are on Sage.

TIM

23:07 Yeah. Okay. That's what I was thinking. Some of the California or people?

MIKE

23:11 Spectrum or whatever it is. Yeah.

TIM

23:15 Yeah, I read was on spectrum. Yeah, anyway. Okay.

LAUREN

23:20 Is there, is there a push to make the ERP system consistent across portfolio as well? Is that what ifs was meant to be?

MIKE

23:31 That's what ifs was originally meant to be? Yeah. So, I, you know... candidly, which is a word I hate but... there's a story behind that, but, you know, you've got people, that have ownership and ifs and that are still champions and would like to see it... as the complete solution, the enterprise solution and not be plugging in, you know, modules, whether it be procurement, or service. So, yeah, and I don't know Chris on your... evaluation sheet. Do, do you have a column for ifs?

--- Purchase decision ---

KRIS

24:17 Yeah, we do. Okay. Not just as like the incumbent system, but we also wanna do it's. It's got its own space on the evaluation. See? Yeah.

MIKE

24:33 That makes sense. Answer your question Lauren.

LAUREN

24:36 It does. Yeah, I was just curious.

KRIS

24:39 Yeah, our idea is... yeah, some people think that is, can be customized to do anything.

--- Purchase decision ends ---

TIM

24:48 But I can.

KRIS

24:49 And, and eventually, yeah, with enough time and resources and effort, but we want to, we want to see. Hey, does a off the shelf program exist in the market that can plug in easily and serve the needs of the business better? And that's part of what these evaluations are for?

TIM

25:06 Yeah, you got it. And to cash, I mean, you said it, and that's a big buzz word around here with us too is, you know, that's what we're telling you guys drive and you're right? I mean, that's all we focus on. So.

LAUREN

25:20 I think we've got a good plan moving forward.

--- Dispatch ---

LAUREN

25:22 I don't have any more questions at this point, but I'm not shy about reaching out if I do. So you may hear from me but we'll wait to hear from you, Chris, about getting a call scheduled with Dela, and do once you talked with mark, and then from there, we'll look into... getting some kind of regular cadence, to meet and kind of go from there, thank you both or thank you all for joining.

MIKE

25:50 Perfect. Great.

LAUREN

25:51 See you guys.

KRIS

25:52 Do you mind, Cammie, of this?

MIKE

25:55 So, Mike, do you?

KRIS

25:56 Have anything after this?

MIKE

25:58 Hang on, Chris, Tim. Good to see you again.

--- Dispatch ends ---

LAUREN

26:04 Yes.

TIM

26:06 Same, I'm just trying to stay warm here, but I think you're up in Pennsylvania, right? Chris.

KRIS

26:11 I am. Yeah. And I snow outside. It's beautiful.

TIM

26:14 Nice.

LAUREN

26:17 We don't get enough of that. All right, Tim, I'll call you and Chris, you'll call Mike. It sounds like... talk to you guys later. Bye.

MIKE

26:28 See you guys. Thanks. Yeah, yeah.

*The End*