



ServiceTrade Review

Sarah Bartkus with Velocity Mechanical
Recorded on 12/12/23 via Zoom, 9 min.

Participants

SERVICETRADE

Sarah Bartkus
Account Manager

VELOCITY MECHANICAL

Corey Sayre
Owner

Topics

<i>Call Setup</i>	0:00
<i>Pricing</i>	4:45

Transcript

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

--- Call Setup ---

COREY

0:00 Good morning. Morning. How are you?

SARAH

0:02 Hey, I'm doing well. How are you? Good? I'm pulling up your account right now. So give me just a second. Sure.

SARAH

0:31 All right. So we've got Corey on here today and are you the let's see? I just wanna make sure we've got you in here as the owner.

COREY

0:40 Yup.

SARAH

0:41 Perfect. I'm gonna turn this up. I just got a new computer. So I'm still learning how to use it. So I'm gonna turn you about you. Yeah, it's been a I'm not, are you a Mac person or?

--- Call Setup ends ---

COREY

0:57 I am an... HP person. I don't like max operating system, all windows. So.

SARAH

1:07 Yeah, I feel that I've always used windows and, my company, they offer a computer for us and it's a Mac though there's no like options.

COREY

1:22 My computer.

SARAH

1:23 My, my personal computer is about to die. So I was like, I really need to have this, but it's been really difficult to learn.

COREY

1:31 Yeah, yeah. I've worked on max a little bit before and I, yeah, I feel your pain.

SARAH

1:38 So, let me... okay. Well, I'm looking at your account, let me just confirm a couple of things for you. It looks like you've got you're only using three technicians right now.

COREY

1:52 So we actually aren't even on service trade anymore. That's why I wanted to schedule a meeting today just to kinda go over things. We ended up switching software. So I need to send an e-mail in still just like, you know, an official e-mail that we're not gonna continue service.

SARAH

2:14 Okay. Was.

COREY

2:15 Something...

SARAH

2:16 Like who did you decide to end up going with?

COREY

2:20 We're on BuildOps right now. And the main driver for that, you know, service trade works really good for what we needed at the time. But moving forward, I was looking for something the biggest driver was a purchasing module really needed like a robust purchasing platform. We're finding that parts, you know, we buy parts through like just a Quickbooks purchase order. And then we'd have to enter it in service trade and, you know, it's doable. We did it for a while but as we get more technicians, it's just kind of becoming a problem with forgetting how to enter things or excuse me not how to enter things for getting to enter them into each job that they belong to. So that was really the biggest driver. And then the other one was, you know, software is not, it's not a one size fits all. And for us, we don't really like the workflow. Okay? So we're having issues with technicians, not entering notes. I see there's like a gated workflow and service trade that we could force on the notes, but we weren't using it like how service trade set out to, for it to be used. If that makes sense. We're just making instead of making like individual a visit for each day, if you will. We were just assigning a job. It's kind of a backwards way of doing it from the way we learned. But it was our work around. Yeah, like I say, we work good for the time being just as we grew got a little bit more difficult to keep track of everything I was, you know, nothing. Nothing against, you know, service trade or any of the support we received. It was pretty good really.

SARAH

4:21 Feel like you're breaking up with me right now Corey... it wasn't you, it me... no, I'm just getting.

COREY

4:29 Yeah, just.

SARAH

4:31 Okay.

COREY

4:32 If there was a purchasing module on there, you know, it probably would have been a little bit different but.

SARAH

4:40 And let's see here, you already signed on with BuildOps. You guys have already been using them.

--- Pricing ---

COREY

4:45 Yeah.

COREY

4:50 Is there a purchase module that's gonna be, you know, released at some point?

SARAH

4:56 I mean, I could always ask and check because we've got a lot of stuff. I know we have a lot of things moving forward. You know, this is the end of the year and every year we have like a whole road map put out usually for our quarter one meeting, but I can ask and see if there's something that's coming that maybe I just don't know about yet. Did you, I mean, would you be interested in? I mean, you already signed on with BuildOps, so that's why.

COREY

5:26 Yeah. Is...

SARAH

5:28 It worth it? I mean, I will ask for sure. We, we would hate to lose you if that's if that would be something that would keep you. But also, you know, if you plan on leaving anyways, I just don't wanna like, you know, do a bunch of work and try to find.

COREY

5:41 Yeah. So let me.

SARAH

5:43 And then, and then you just be like, well, I'm not changing anyway, so.

COREY

5:46 Yeah, definitely. Don't don't spend a budget of time. I just was curious if you knew the answer already. We're already locked in with BuildOps and have been used in the platform, but I was just curious if that was something coming down the pipeline. But yeah, I say don't waste a budget of time on that because it's not gonna, you know, change the result right now.

SARAH

6:06 Yeah. No, I mean, I'm still interested to find out even if it's not for you, maybe another customer would have this question. So I will definitely put some feelers out there and see, you know, if anybody has heard of anything so far. And then I just put in my notes here too. So when you and I meet because you guys have, so you still have a few more months before your renewal is coming. So see you guys, are... it's like April I think is your renewal? So I've already put in my notes that you guys are non renewing, and we just need like an official e-mail from you... and you guys won't get charged again for the new renewal if you change your mind, you know, and but, you will probably have someone like reach out to you like a customer success manager, perhaps to kind of also again, you know, ask you a little more about like, you know, what's going like is to see if there's anything that we can do.

--- Pricing ends ---

SARAH

7:08 But if not, that's fine. I just put in my notes here. So they already know.

COREY

7:13 Sounds good.

SARAH

7:16 Right. Well, we hate to see you go, but, you know, if you ever decide that you wanna come back or, you know, things change, we're always growing the, you know, we're always adding extra things in. So you never know if you ever want to come back, you know, we'll definitely welcome you back with open arms. So.

COREY

7:32 Sounds good. Yeah, I definitely will totally rule that out. You know, technology changes so fast and our needs are always changing too. So, you know, just like with service Ray, what fits us at the current moment may not be the same thing, you know, a couple of years down the road. So we'll see.

SARAH

7:53 Okay. Well, I appreciate you. Let me know. I mean, this is very nice for you, to meet up with me and let me know what was going on here. So I really appreciate that. I've got here in my notes. So you're good to go on that. And I appreciate you being very honest with me. So, yeah. Well, if you change your mind or if there's anything that we can do to help or if I find out that, we do have a purchasing module for you, I'll send you some information on that to take a look at and, you know, if you change your mind, just let me know.

COREY

8:24 Sounds good. One more question. The, the e-mail should I send that to you?

SARAH

8:31 Yeah, you can send that to...

COREY

8:32 Me.

SARAH

8:33 And I'll send it to accounting.

COREY

8:35 Sounds good. I will do that. Thank you very much. All right. Thanks core.

SARAH

8:39 Appreciate it.

COREY

8:40 Have a good day. Bye.

The End