



Call with Hvactech Systems Inc. - Darcy Larsen

Brian Corridore with Hvactech Systems Inc.
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Participants

SERVICETRADE

Brian Corridore
SDR

HVACTECH SYSTEMS INC.

Darcy Larsen
Finance Manager

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Transcript

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

DARCY

0:00 Welcome to hvac tech systems. We are a commercial and mechanical contractor for the ucon and currently don't provide residential services. If this is a service call, please dial 300 for Darcy accounting and administration. Dial 300 for Roy. Dial three zero one for George project management. Dial three zero three for Mike service manager, dial three zero four.

DARCY

0:35 Hello? Yeah.

BRIAN

0:41 Hey, good morning, Mike. Hey, Mike. My name is Brian. I'm reaching out over with service trade. Did I catch you with just a quick minute here?

DARCY

0:52 Sure.

BRIAN

0:53 Awesome. I appreciate it. So, I actually spoke with George a couple of days ago... but just to kinda give you a quick rundown of what we talked about.

--- Type of work ---

BRIAN

1:01 So service trade, we're excuse me, we're a software platform. We're specifically designed to help commercial service contractors and, you know, we help simplify the workflows, for scheduling, managing work orders, and driving sales as well. So, I was really just calling to see kind of how you guys are managing your work orders at the moment.

--- Accounting integrations ---

BRIAN

1:20 You know, if you guys are on and paper tickets still or if you guys are, a software you're using already?

DARCY

1:27 We're currently on build ups. We switched to, we switched from paper two and a half or three years ago.

BRIAN

1:33 Okay. Gotcha. Okay. Yeah, I'll speak with, you know, tons of folks who use build ups, and nothing against them.

--- Accounting integrations ends ---

BRIAN

1:40 But, but I've heard a lot that they tend to over promise and kinda under deliver on the things that they promise that, they can do, have you guys run into anything like that? Or any instances that you've noticed?

DARCY

1:52 No, I've been pretty happy with him so far. Yeah, not really any complaints.

BRIAN

1:57 Okay. Got you.

--- Type of work ---

BRIAN

1:59 Okay. And they're more geared for the Construction side of things. Is, am I right about that? Or am I a little off?

DARCY

2:07 No, we got with them for service and they were still building their projects or Construction platform. So they were, yeah, and, I know we use them for projects and Construction as well. I don't know how well that works because I just run the service department. So, I don't use it for projects at all.

BRIAN

2:13 Okay. Gotcha.

BRIAN

2:22 Right, right.

BRIAN

2:24 Sure. Yeah, I think that's more or less what George and I had spoken with since he's on the project side of things, he was more, you know, knew more about the project side than the service side.

--- Type of work ends ---

BRIAN

2:33 But honestly, I mean BuildOps, is one of our, you know, highest competitors, you know, they're very, I wouldn't say they're you know, close to what we do, but like I said, I mean, they do tend to over promise, and kinda under deliver on, you know, some of the services that they say that they can provide. I mean, would you be open at all to kinda checking out like what ServiceTrade does, and kind of doing like a comparison demo just to see if there's you know, anything, that, you know, we have capabilities of, that you might be looking for or might be relevant for you guys?

--- Customer engagement ---

DARCY

3:04 Can you tell me what you guys do differently? Like I assume that you've been told they over promised and delivered by people who switched to service rate. What if, what if those people found a different or better?

BRIAN

3:14 Yes. So that's a great question. So, I definitely know that the, they don't have a customer portal through build apps. So very little like customer engagement, and getting invoices over to the customers can be a little challenging.

BRIAN

3:27 But as far as I know they're just really focused on quoting, and, you know, scheduling a dispatch, and asset management, which is all things that we have under our tool. But as well.

BRIAN

3:39 But as far as I know just a customer portal and customer engagement and building like, you know, engaging with your customers, is just something that they don't do very well. I know the implement implementation time for build apps, is quite a long process as well.

--- Purchase decision ---

BRIAN

3:58 But as far as like the super nitty gritty and detailed stuff of like what we do differently, that was really the point of my call was to set up a quick demo with you with one of our territory managers who is just, you know, much better at answering those condo questions?

DARCY

4:12 Okay. What does that entail?

BRIAN

4:15 So, I usually block it off for about an hour, but it's about a 30 minute meeting just to kinda sit down, and answer any questions you might have or, you know, just

to take a look at what ServiceTrade does. We would just show you the INS and outs of the platform. And now really just how it all works, and we try and make it as specific as possible to your business as well. So it's not just you have some generic presentation that you're listening into it. It'd be, you know, tailored to your needs.

DARCY

4:41 Okay. Well, let me talk to my finance manager who's on vacation because she does.

--- Purchase decision ends ---

DARCY

4:45 So I, when we use build up, I run my technicians and I process all the work order. She does the invoicing on the other end of build up. So I'm not sure if she has any concerns or questions or she'd like some things changed. And then if you want to send me an e-mail I can loop her into that and we can go from there.

BRIAN

4:52 Okay.

BRIAN

4:58 Sure. Okay.

BRIAN

5:04 Yeah, no worries. I know with the holidays coming up, it's going to be, you know, challenging on our end to find a time to, you know, coordinate if we were to like reconnect next week or the week after, I mean, would you be okay with like putting something down tentatively? And then, you know, we can move it around whenever you figure out her calendar and, you know, we can just make it work with, at whatever time works best for her.

DARCY

5:25 Sure. What are we on here? Today is the seventeenth I'm out of town for work next week. So sometime the week of the 20 seventh, let me just pull up my calendar.

BRIAN

5:32 Okay. Let me look at my week of the 20 seventh. Soon mornings or afternoons usually a little bit better for you?

DARCY

5:36 All right.

DARCY

5:39 20.

DARCY

5:42 Mornings are typically better. I try to get meetings out of the way. So I free up for calls. Okay. 20 seventh is no good 28.

BRIAN

5:46 Okay.

DARCY

5:52 Thirtieth works.

BRIAN

5:54 Okay. Let me see what I got the thirtieth.

BRIAN

6:03 I don't know why my calendar is not pulling up?

BRIAN

6:14 Interesting. For some reason, I don't have access to my calendar. Would, would there be a time on the thirtieth that looks good for you? And then I can just get back to you with that calendar invite.

DARCY

6:25 Nine o'clock...

BRIAN

6:27 Nine o'clock okay. You guys are Eastern Time?

DARCY

6:30 We are Pacific Time?

BRIAN

6:32 Pacific, okay. So that'll be.

DARCY

6:33 Mountain Time, we stopped doing, hang on. We, we either don't do daylight savings or we, I forget which time we're on now, we don't do the savings anymore, but I forget what time we stayed on time.

BRIAN

6:36 Yeah. I wasn't really sure with.

BRIAN

6:43 Okay. So, is it?

--- Pricing ---

BRIAN

6:46 Is it 826 with you guys right now or 926?

DARCY

6:49 926.

BRIAN

6:50 Okay. So, you would be, I guess Mountain Time?

DARCY

6:53 We're GMT minus seven?

BRIAN

6:56 Okay. So you guys are two hours behind this? Okay. Yeah, I'll definitely get that over to you whenever I can figure out why my calendar isn't pulling up, but I'll send over that calendar invite for we said nine a.

--- Type of work ---

BRIAN

7:09 M that's Mountain Time on the thirtieth, okay. Do you, do you mind if I ask just a couple more questions just so I can get, you know, as much information over to that territory manager as possible?

--- Pricing ---

DARCY

7:06 Sure.

--- Type of work ---

DARCY

7:19 Sure.

BRIAN

7:21 Okay. Are you guys mainly commercial, what's kind of the breakdown between like commercial and residential for you guys?

DARCY

7:29 Almost entirely commercial. We'll do residential for like the president of some of the bigger companies we do work for, but other than that, we don't touch anything residential?

BRIAN

7:31 Okay.

BRIAN

7:35 Okay.

BRIAN

7:38 Gotcha. Okay. And are you guys more focused on like service, and installs, or service and maintenance? Or is it maybe like a mix of both, and installs as well? Like what's kind of the workflow for that?

DARCY

7:49 It's a mix. We have an install department and the service department. So I run the service department and I've got including myself six technicians.

BRIAN

7:57 Okay. So, six text on service?

DARCY

8:00 Yep. And then we've got about... between 10 to 12 on the Construction side.

BRIAN

8:05 Okay. And on that Construction side, are those texts cross trained at all to do both Construction and service or are those divisions separate?

DARCY

8:13 All the service guys are cross trained to do Construction and some of the Construction guys are cross trained to do service.

BRIAN

8:20 Okay. What would you say? Your, your bread and butter is over there as far as like equipment that you're working on. And would you say you're more focused on like new Construction, or more focused on service?

DARCY

8:32 Financially Construction makes us more money, but service keeps the lights on because I can, I Bill a lot more quickly. I've got more money coming in consistently. So, yeah, I'm not really sure how to answer that. We've obviously new Construction, you make a lot more money on, but you've got to float the cost for a longer time.

BRIAN

8:43 Right. Yeah, fair enough.

BRIAN

8:50 Definitely, definitely. Okay. And are you guys doing like a lot of planned work, and planned maintenance? Like setting up preventative maintenance contracts and, you know, things like that.

DARCY

8:59 Yep.

BRIAN

9:00 Okay. So it's not so much, just like when the phone rings, someone has a deficiency, they call you, excuse me and they call you and report it. And then, you know, you guys go out and service that. It's it's more just like scheduled stuff.

DARCY

9:12 Yeah. There's a lot of scheduling. I mean, we obviously do take service calls as well, but only for our existing clients.

BRIAN

9:15 Yep.

--- *Accounting integrations* ---

BRIAN

9:18 Okay. Gotcha. Okay. All right. Yeah, that's really good information for me to get over to the territory manager. Is there anything as far as like, you know, as far as considering a new software goes, is there any like really big things that you're looking for to get out of it or, you know, what's really important to you when it comes to looking at a new software?

--- *Paper process* ---

DARCY

9:38 So, if we were going to switch to like we've so we switched from paper to this, the problem we have with paper was that it was too slow. So I wouldn't want to lose any of the speed that I've got because, I tried to be out in the field about 50 percent of the time. So I need to be able to process invoices and process work orders pretty quickly.

BRIAN

9:45 Right.

--- *Dispatch* ---

BRIAN

9:54 Okay.

DARCY

9:55 So, the way, like I assume you're somewhat familiar with BuildOps like that, I make a job, I send the guys out to do the job, they complete the job. And then I can, I have a search parameter where I can search for completed jobs and I can look at them, read them, quickly, adjust pricing if I need to, and then I can send it off for invoicing. I'd wanna be able to do the same thing.

BRIAN

10:05 Okay.

BRIAN

10:10 Okay, perfect.

--- Dispatch ends ---

BRIAN

10:14 Okay. So speed, and being able to, you know, just send out invoices and make adjustments to work orders and those invoices as well as is important to you.

BRIAN

10:26 Any, anything else that that's you know, a big must have, for software?

DARCY

10:32 We need to be able to manage inventory. We've got all our, all of our inventory is in built up.

BRIAN

10:36 Okay. Gotcha. Yeah, we have, you know, asset tracking, and that capability as well. Okay?

BRIAN

10:45 Okay. Yeah. This is really good information for me to get over to. Like I said, my calendar is not pulling up for some reason. I'm just gonna have to figure that out. But what is the best e-mail to send over a calendar invite to, whenever I get that fixed?

DARCY

10:59 Mike at H, a U con dot CA?

BRIAN

11:02 HU dot CA? Okay, perfect. Yeah. So I'll send over that calendar invite, like I said, just in a few minutes here whenever I get that figured out. But it'll be for the thirtieth, at nine am your time whenever you get that. Do you mind just clicking accept on that? Just so I know you got it. I know, we might move it around depending on your account and schedule... but just to let me know that you got to just to click accept on that. But, any questions for me at the moment? As far as, you know, with service trades about, or any questions I can get answered for you in the meantime?

DARCY

11:40 I don't think so. Like I assume, I know there's what is it service site and service trade BuildOps? I assume there are other ones that do the same thing.

--- Access to information ---

DARCY

11:48 Like, the general idea is that you're doing everything on your phone or my technicians are doing everything on their phone. I assume that like the general idea across anyone's service platform is the same. I'm not familiar with service trade. So I don't know, what you guys would do differently or how your interface works?

BRIAN

11:52 Right, right.

BRIAN

12:05 Sure. Yeah. So we, it doesn't matter if you have, you know, an iPad iPhone, android, we have, you know, capabilities with all those devices, but yeah, it's essentially, you know, similar to other service platforms where, you know, we're really just focused on, you know, increasing tech productivity being able to send out invoices in a much quicker way, and, you know, have that customer engagement but, all the details is really what, the whole demonstration is for just because once you lay eyes on it, I'm sure you're going to HA, more questions, and, you know, that's just what the meetings for to get those answers, those questions answered for you?

--- Access to information ends ---

DARCY

12:41 Yeah, certainly the best way to do it.

BRIAN

12:42 Yeah, yeah, definitely. Okay. Yeah. So we will shoot for the thirtieth at nine am and then I might just give you a shout, the day before or maybe two days before just to make sure you know, nothing came up and everything's so good to go for that.

DARCY

12:56 Sure. That sounds good.

BRIAN

12:57 Awesome. Well, Mike, I do appreciate your time and yeah, looking forward to speaking with you some more in a couple of weeks here.

DARCY

13:03 Great. Thanks for the call. I appreciate it.

BRIAN

13:04 Yeah, take care. Thanks.

The End