



Call with MacDonald Miller - Travis Eshpeter

Sean Jenkins with MacDonald Miller
Recorded on 11/22/22 via SalesLoft, 20 min.

Participants

SERVICETRADE

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Transcript

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TRAVIS

0:00 Hello? Travis.

SEAN

0:01 Hey, Travis, Sean Jenkins with service trade, we still good for nine.

TRAVIS

0:06 Yeah, man. How's it going?

SEAN

0:07 Cool. Yeah, going pretty well. Just took tomorrow off. So counting down the hours today, but looking forward to getting some Turkey and mean these next few days, what about you?

TRAVIS

0:19 Yeah. Yeah. Training and some stuff wrapped up so that I can enjoy the time off.

SEAN

0:25 I hear you. I hear you. Well, I figure we can just get into it. I know we talked super briefly when I spoke to you a couple of weeks back, but just to give you a quick overview of kind of what service trade is. We're a service management platform both for the commercial service industry to help mechanical contractors be more valuable to their customers as well as streamline operations and just provide a more premium experience for your customers. So just kinda wanna talk to, you see kind of how y'all were doing things right now.

--- Type of work ---

SEAN

0:56 Saw on your website. Looks like you're doing mechanical service work for HP AC systems as well as electrical work and plumbing. I'm doing like preventative maintenance for all those. So, how are you managing everything right now? Kinda tell me what that processes for the service operations?

TRAVIS

0:53 Yeah.

TRAVIS

1:15 Well, we currently use the mobile tech.

--- Accounting integrations ---

TRAVIS

1:20 For field deployment and then on the back end that's GP.

SEAN

1:27 Gotcha. Yeah, quite familiar with Great Plains. How is that been working for you? How do you feel that does in terms of managing everything?

TRAVIS

1:34 It's great. It's great planes. You're familiar with it? It's great plan.

SEAN

1:38 Yes. Yeah. We have a few customers on it. Yep. And that's kind of what I've heard as well. Mobile tech, you know, like all these big ERP systems, you know, they have those field platforms that, you know, integrate seamlessly. But outside of that, that's pretty much their biggest selling point. So, just curious to hear a little bit more about kind of your experiences with it.

TRAVIS

1:39 No upgrade about it, right? Yeah.

TRAVIS

2:01 Yeah, I mean, it's just, you know, how it is great plan.

TRAVIS

2:07 I can kinda tell you where I'm at, I'm actually exploring without doing a full ERP swap.

TRAVIS

2:16 When I can tied into Great Plains, far as.

TRAVIS

2:22 You know, field mobility, just matching things like that just so that I don't have to involve other business units at this point.

--- Accounting integrations ends ---

SEAN

2:34 Gotcha. So have you started that search or is it just kinda been like a thought you've had, and I caught you at a good time?

TRAVIS

2:41 No, no. We've done some exploration with like Microsoft field services?

TRAVIS

2:50 But it's just coming more than the forefront of the conversation on.

TRAVIS

2:56 Like a full digital wrap, things like that.

TRAVIS

3:00 So, it's something that will be exploring and 23 for sure.

SEAN

3:05 Gotcha. So kind of use say exploring and 23, is there like a specific time line that you're thinking of to try to get something new up and running? Like maybe middle of 23 or kind of what's your idea for the time on that side?

TRAVIS

3:22 You know, I really don't have one.

SEAN

3:25 Fair enough.

TRAVIS

3:28 It's not something that.

TRAVIS

3:31 Yeah, trying to avoidable RFP thing occur if we find the right package that can get us at least part way there for now until we can replace GP.

SEAN

3:33 Gotcha.

SEAN

3:45 Definitely. Yeah. Well, I do know that we have customers have our own on great planes.

--- Type of work ---

SEAN

3:51 Definitely, I feel like Mary Beth would be the one who should really talk to you more in depth on that. That's a little outside of my scope. But it's not unprecedented for us. So we can definitely work with you about kind of how we're able to do that. But for great planes and mobile check, that's what you use for everything for the electrical plumbing HB. AC.

TRAVIS

4:15 Yep. Yeah. Yeah. So, I'm responsible for service operations and that's electrical service control, service, plumbing service, HPC?

SEAN

4:17 Gotcha.

SEAN

4:27 Gotcha. So I was gonna ask, I saw that y'all had a 11 locations I believe on your website or are you working at like the headquarters overseeing all of that?

--- *Purchase decision* ---

TRAVIS

4:37 Yeah.

SEAN

4:39 Okay. Gotcha. And then would you be like the decision maker on this kind of thing? Or would there be other people who would need to be involved just for the service operation side?

TRAVIS

4:51 I'm the final decision maker. Yeah.

SEAN

4:54 Gotcha.

TRAVIS

4:56 I mean, obviously it up to run stuff by my exact, but be me making the decision.

SEAN

5:00 Of course.

--- *Type of work* ---

SEAN

5:02 Okay. Yeah. Well, if you're looking to make a change for your service operations, everything that you all do is exactly what we were built for. We were built specifically for companies like yourself doing those kinds of recurring services for all those different industries. So definitely would love to show you a full demo on kind of exactly how we manage all that.

--- Purchase decision ---

SEAN

5:23 Mary. Beth would just kinda walk you through a few different workflows from the field perspective as well as the office just to kind of give you a general overview. And then you can kind of take next steps however you feel fit. And then we can just kinda go from there. But yeah, just from everything you're telling me this is exactly what we're designed for. So we'd love to gets go ahead.

TRAVIS

5:27 Hello?

TRAVIS

5:36 Yeah.

TRAVIS

5:43 Yeah.

TRAVIS

5:46 Yeah. I was gonna say all clarity. I'd love to get something set up like after planning season like right now, obviously, we're in a crunch time to set budgets and everything for 23 and all of that before or end of the year retreat with the rest of the senior leadership.

TRAVIS

6:04 So if we can set something up after the first of the year, that would be ideal for me.

SEAN

6:11 Gotcha. So that's because you're setting up budgets right now.

TRAVIS

6:15 It's just planning season for us. So.

TRAVIS

6:20 Budgeting all of the exciting stuff planning for the next year.

SEAN

6:25 I gotcha. Yeah. Well, I would definitely love to, you know, show you the platform like preferably either next week or sooner than before the end of the year just because this is our busy season right now. So we have a lot of people who are trying to, you know, find slots on our managers calendars and definitely for you to be able to get a, the best understanding of kind of what the budget is, and just even see if this would be a good fit just for exactly what you're looking for.

--- *Purchase decision ends* ---

SEAN

6:56 The meeting would only take about an hour. So if we schedule that out would definitely love to kind of show you around and then kinda from there, we can work that into maybe your overall a planning for next year. So do you have availability next week or the week after?

TRAVIS

7:13 I am full until.

TRAVIS

7:20 The week after new years, the week of New Year's Day.

SEAN

7:24 Man.

TRAVIS

7:25 That's literally helpful. We are that's a.

SEAN

7:32 I hear you. Okay. No, for sure. Yeah. So what all are the kinds of responsibilities that you're dealing with right now? In terms of next year planning? Is there any other like priorities that you all have that my tied into service operations?

TRAVIS

7:32 Lot going on right now?

--- *ST app contracts and pricing* ---

TRAVIS

7:53 Yeah. I mean, everything from developing.

TRAVIS

7:57 Capital expenditure budgets?

TRAVIS

8:01 How many also run our fleet? How many vehicles we're going to be by and everything?

SEAN

8:07 Gotcha. So are you looking to expand more after the new year? You're trying to find budget to get new trucks, everything like that?

TRAVIS

8:14 Yeah, we don't need the budget for that. Is it more of planning and how do we do things like that?

--- Pricing ---

SEAN

8:22 So, what do you?

TRAVIS

8:22 Yeah, our growth rate is, I mean we'll probably be onboarding and another 40 service techs next year.

SEAN

8:31 Okay.

SEAN

8:36 Okay. So it sounds like you're growing pretty aggressively and you're just trying to plan out exactly the logistics of how all that's going to happen.

TRAVIS

8:45 Yeah.

--- Purchase decision ---

SEAN

8:46 Okay. Gotcha. Yeah. Well, in that case, I totally understand scheduling something after the new year, especially with situation like this. Don't wanna rush or anything for no reason. So we can look at January of 23. What I could do is just get in touch with you maybe mid December, and then we can kind of go from there.

--- Purchase decision ends ---

SEAN

9:08 I'll touch base with Mary Beth. She's out all week this week, just kinda see if she would be okay with get something scheduled out that far. Typically, we like to, you

know, not go a month and a half out with our scheduling, but if your calendar is so cool.

TRAVIS

9:24 Yeah, I mean, but it is the number of the holidays people are in and out and it's for most mechanical contractors this time of year for us is pretty heavy.

SEAN

9:28 Yep.

SEAN

9:34 No, for sure. So yeah, maybe we could get something scheduled. I have my calendar up. I'm looking at the first week of January. No surprise. On my end, it's pretty open right now. So kind of up to you on exactly what point you would want to get something scheduled to give you the full walkthrough, we can do anytime that first week of January, preferably Tuesday. We have a lot of meetings going on that first Monday of the new year. So I don't know if there's a specific time of day that would work better for you?

TRAVIS

10:08 Wednesday looks pretty open to me.

SEAN

10:11 Okay. You want to him for same time is right now maybe like nine am somewhere around there?

TRAVIS

10:18 Sure.

SEAN

10:19 Okay. So we can do nine am Wednesday, the fourth, we can get that scheduled right now and then I'll... get in touch with you on that week and we can just kinda touch base, see if anything changed and then just kind of go from there. But outside of that, Travis, is there anything else specific that you're most interested in learning more about? I know you mentioned dispatching things like that as well as kind of a full digital wrap, which is, you know, one of our.

TRAVIS

10:49 Yeah, I just like to kind of see a preview of it like cradle to grave with a service call, what a customer would see.

TRAVIS

11:01 Things like that, like how we can pull data and for analytics as well.

--- Accounting integrations ---

SEAN

11:08 Gotcha. How do you do that right now?

TRAVIS

11:11 We use PowerBI?

SEAN

11:14 Our VI.

TRAVIS

11:16 PowerBI?

SEAN

11:17 Yeah. Okay. So that's an external program that does like reporting and analytics.

TRAVIS

11:25 Yeah. The Microsoft program.

SEAN

11:27 Gotcha. And what kinds of.

TRAVIS

11:28 So, it's like excel on steroids?

SEAN

11:31 Okay. So what kind have?

TRAVIS

11:33 Well, the way to visualize data?

--- Accounting integrations ends ---

SEAN

11:36 Okay. But what kind have like insights are you trying to get out of this? Like when you are doing those analytics? I kinda what's important to you when it comes to like different metrics, things like that?

TRAVIS

11:49 I mean, it's going to be anything with the normal service business?

TRAVIS

11:57 Maintenance hours over and under like maintenance plan, maintenance hours.

TRAVIS

12:05 Labor, build laver?

TRAVIS

12:11 Web open call.

SEAN

12:11 Yeah, just.

SEAN

12:15 Perfect China, you know, for Mary, Beth, just so she can, yeah, show you exactly how we do that. So she'll be able to show you the reporting.

TRAVIS

12:17 Native space?

TRAVIS

12:22 And and then when she shown, I could show or how we visualize it too.

--- *Accounting integrations* ---

TRAVIS

12:27 Because ideally, we'd be able to pull like an eight, your API and merge it with other stuff that we do.

SEAN

12:27 Great. Yeah.

SEAN

12:34 Nice. Yeah, we have an open API. So, if there are programs that you're thinking of have something similar when we can work with that so we can do that. So right now, I know that.

--- *Type of work* ---

SEAN

12:48 You mentioned you all are doing a lot of like preventative maintenance, things like that, what, what's the split between like proactive service work and a reactive service work.

TRAVIS

13:04 Well... let me look at the data. A lot. We're typically a one point five two and demand to plan maintenance ratio.

SEAN

13:06 You can just ballpark it?

SEAN

13:16 Okay. So, for every to plan maintenance, you get one reactive call?

TRAVIS

13:21 Opposite.

SEAN

13:23 Gotcha. Okay.

TRAVIS

13:24 Yeah. So about one and a half on the average?

SEAN

13:32 Great. So we can show you how we handle those reactive along with the preventative maintenance, recurring services, things like that. So what I'm gonna do right now, Travis, I'll send you over the meeting invite for, yeah, January fourth at nine eight.

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

SEAN

13:49 And then I'll get that on Mary best calendar right now just to have that visibility for when the time does come. And then I'll touch base with you. Like I mentioned Tuesday, the third, I'm sending you over a invite right now. So when you do get a moment, just go ahead and accept that and we can...

--- *Customer engagement* ---

SEAN

14:09 Have that pop up on her calendar. I'm trying to think honestly just kinda with everything you're telling me, I talk with, you know, companies like yours all day every day. So I definitely kind of do you have a good feel for kind of what you're thinking of and definitely excited to be here with all the growth that's definitely what we were built for as companies trying to get more out of their service techs and we see an increase in 23 and a half percent service repair revenue for our customers on average.

--- *Purchase decision* ---

SEAN

14:35 So definitely think that are these priorities aligned with trying to help you be able to grow even more at a fast pace? So I just sent that over. And then if you have any other questions pop up anything like that, please let me know. And I can definitely figure out anything else if you have something pop up over the next month or so that you'd be interested in learning more about. But I'm curious, are you looking at any other platforms? Are you evaluating anything else?

--- *Purchase decision ends* ---

TRAVIS

15:10 Yeah. So Microsoft field services, sweet that peer group companies switch over to that?

TRAVIS

15:19 BuildOps is another one.

TRAVIS

15:25 And that's kind of the front runners there then.

SEAN

15:25 Okay.

SEAN

15:32 So, have you looked at those platforms yet? Or those on the calendar now?

TRAVIS

15:39 I have looked at them but having a conversation about next year, what they are, but at this point?

--- *Type of work* ---

SEAN

15:45 Gotcha. Okay.

TRAVIS

15:46 But their products that we've looked at before?

SEAN

15:50 Okay. Gotcha. Well... definitely makes sense as those are some of our biggest competitors specifically build up. So definitely would love to kinda show you how we are different on that side. And I know we're just pretty much talking about service right now, but do you all do any like small install jobs that might fall under your

kind, have umbrella specifically? But I would imagine most likely in the electrical space doing like retrofits things like that? And he kinda short term project work.

TRAVIS

16:21 Yeah, yeah. We do work like that. We manage that a little differently, but, you know, we do.

SEAN

16:27 Okay. So how do you manage that then? Is that still through mobile tech?

TRAVIS

16:33 That's true, great plane.

SEAN

16:35 Okay.

SEAN

16:40 And then, are you doing any kinds of like AI billing things like that or is it just pretty straightforward?

SEAN

16:48 You know, time materials, things like that?

TRAVIS

16:52 Yeah.

SEAN

16:54 Okay. Gotcha. Because we just added, we just announced at last week, we have, you know, project management capabilities specifically geared towards the less than six months. So the smaller jobs, how much of your work, would you say those small projects makeup? Like, do you have like a core group of guys that you typically have be responsible for that kind of thing or is it just kinda of whoever is available?

TRAVIS

17:21 It will be a mix there. There's a dedicated group focus to that, but we pull and make flavor promote under Construction teams at times.

--- Pricing ---

SEAN

17:31 And how big is your Construction team?

TRAVIS

17:40 Fairly substantial.

SEAN

17:43 Okay.

SEAN

17:47 You can just give me a total ballpark. I'm just trying to get some context.

TRAVIS

17:50 Yeah, figure out.

SEAN

17:55 And how, it looks like y'all have quite a few employees there. So.

TRAVIS

17:59 Yeah, I mean, we're in about 1,500 employees and I'd say... 1,200 of those are...

--- Pricing ends ---

TRAVIS

18:08 Union...

TRAVIS

18:15 I think we did. Yeah, I mean, like for.

TRAVIS

18:20 For, was that a lot of sheer?

TRAVIS

18:25 People count?

TRAVIS

18:32 Yeah, I would say the majority is non union, so.

--- Type of work ---

SEAN

18:44 And that, and that ballparks fine. We don't really work with the Construction side. I just wanted to kind of get a little bit more context when it does come to those small projects and just kinda of how many guys are on that Construction side. So, yeah, around 1,200 that's ballpark enough.

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

SEAN

19:03 So don't want you to be going through, you know, databases, et cetera. If that's what you're trying to do. So you're good there, but great, Travis. Well, I'm really excited for you to take a look at platform definitely know that you're gonna like what you see especially with kind of everything you were talking about. So, I will follow up with you on the third and we can just go from there, but I appreciate your time, man. I don't really have a whole lot else on my end. I don't know if you have any questions for me before we go.

--- *Type of work* ---

TRAVIS

18:45 Yeah.

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

TRAVIS

19:04 Yeah.

TRAVIS

19:09 Yeah.

TRAVIS

19:36 No, I'm good. I appreciate your time.

SEAN

19:38 Cool. Yeah. Well, I appreciate yours. Hope you enjoy the rest of your day and hope thanksgiving treat you well.

TRAVIS

19:44 Thanks, Mandy to talk to you soon.

SEAN

19:47 I appreciate it. Sounds good. See Travis.

The End