Call with TDI Refrigeration - Dave McCarthy

Ben Bilhorn
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Participants

SERVICETRADE

Ben Bilhorn
SDR

TDI REFRIGERATION

Dave McCarthy
Service Manager

Topics

Transcript

--- Call Setup ---

DAVE

0:01 The day?

BEN

0:02 Hey, Dave, is Benjamin with service trade? How are you doing?

DAVE

0:06 Good.

BEN

0:07 Good. Did I catch you at a decent time, man?

DAVE

0:10 Sure.

BEN

0:13 Actually, I might not be able to hear you?

DAVE

0:16 Can you hear me?

BEN

0:17 Yeah, I can hear you now. Okay, cool. Yeah. Did I catch you at a decent time?

DAVE

0:21 Yeah, yeah.

BEN

0:22 Yeah. So know if you remember talking with us, but we spoke with y'all, I think last year regarding our platform, we're a field service management software. So that sound familiar to you at all?

DAVE

0:36 Yeah. Who we, to their name Lauren?

BEN

0:40 But yes, yeah, Lauren would be our rep for yells area, but yeah, I was getting back in touch because we're going to be at eight. We're going to be the read a conference coming up in Reno or are you guys planning on attending that?

DAVE

0:56 I'm gonna go. I'm just doing one day. I'm going to be there on the eighth.

BEN

0:59 Okay. Gotcha. Cool. Well, definitely stop by our Booth, but I wanted to kind of have, you know, since we're going to get the chance to see you guys have the conference, I wanted to, you know, check in with you all, see what you guys have.

--- Call Setup ends ---

BEN

1:13 You know, you guys are at right now, I guess in terms of, you know, what you guys are using to streamline your, you know, a service and maintenance operations in terms of, you know, making your workers as efficient as possible? I know that, you know, there's not a lot of workers out there, right? And a lot of, you know, skilled laborers. So being able to get the most out of their time is probably top of your priority list, right? I have to imagine.

DAVE

1:42 Yeah, yeah. Finding them? Yeah, that's the difficult part. Sure.

BEN

1:45 Gotcha. Do you guys have some sort of like service management software? Are you using right now to kind of manage all your work orders, all you're quoting that kind of stuff.

DAVE

1:55 We, yeah, we do. We're on a Simpro.

BEN

1:59 Okay. Gotcha. How long you guys been using that for?

DAVE

2:02 Like five or six years?

BEN

2:05 I see. Is it working? Is it any good working decently for you?

DAVE

2:11 So... there's been a recent battle within office because I don't like Simpro, but that's also, we didn't know some of this stuff that Simpro was capable of. So, they have two different platforms. They have the connect platform for the mobile version. They have connect, and then they have a Simpro mo, mobile decent. I mean, it's still there's still, there are residential platform. They're not really what we should be using but make a change, you know, that's big money big time. So, I was fighting for a change and ultimately shut down, but.

BEN

2:17 Yeah.

BEN

2:57 To who kind have shut you down, I guess.

DAVE

3:01 Our, our office manager and owner.

BEN

3:04 Gotcha. So they're they kind of have the, so they even get the chance to because I know that like obviously change, you know, I've been doing this long enough to know that changes already going to be kind, have it's difficult to push. And especially if you don't have like a good kind have like road map for where you guys are going. You know, what was the extent of that conversation? Was it like we have a price for what the, what an implementation of another software is gonna look like? Or where they just like we won't even consider looking at something new?

DAVE

3:38 No, no, no, no, yeah. I made a big push because we were having some issues and the, you know, the guys can pull out certain things that they can't do. And then it came up and one of our meetings, I'm like why we still digging with this? Like we should be let's look at different options because this is obviously not working. So. And I had been getting bugged by. It was another platform company.

DAVE

4:06 So, I entertain that and then I, you know, push, you know, for them to do a demo and look at it like the crap we're doing is not right. But then my office manager reached out to Simpro and said, hey, you know, they should, it doesn't work, right? And I said, well, you guys using connect, we don't even really support that. They don't do anything to develop that anymore, and they're going to get rid of that. They're getting rid of it really. And so I looked into their mobile over their mobile platform without having to have what you call it. But it's still the same thing, but it's a different app, but it does do a lot more stuff that we complain about, but it's still not 100 percent like there's still quite a few things in there that are like not really set for us.

BEN

4:41 Right.

BEN

4:46 Okay.

BEN

4:59 Gotcha. And have you guys been trying to use mobile for?

DAVE

5:04 So we're not even fully rolled out with mobile. I use it and I have a couple of other guys use that. We're kind of just kind of trying to find what problems that has, what it can do, what it doesn't do.

BEN

5:16 Gotcha.

DAVE

5:18 That stuff and it's a lot better but it's still not, you know, it's still does dumb stuff like it's a residential platform and we're not financial.

BEN

5:30 Right. Right. Well, here's, what I'll say, how much do you remember? Because it looks like I'm kind of looking over our notes from the last time we talk with you guys, which would have been may of last year.

BEN

5:47 And actually, it looks like we didn't even get the chance to show you. We ended up cancelling the demonstration that we're gonna do with you guys.

DAVE

5:53 Yeah, we were gonna do a demo and then, yeah, something happened. I don't remember.

BEN

5:58 Well, here's what I'll say, I would still recommend, you know, recommend taking a look at service trade, you know, working with one of my, I know my, I think my territory manager, I think I guess it would be Lauren stale or might be Dan, but they, it'll probably show, you know, what it would look like on service trade if service trade would even address any of those issues that you guys are worrying about and.

DAVE

6:28 No, I mean, we, when we sat down with Lauren, this is a couple of years ago, two, three years ago, a lot of stuff was, you know, address and how we operate and, you know, a lot of things did a line but I think the price was quite a bit more.

BEN

6:45 It was just the price that was an issue though.

DAVE

6:48 No, I don't think it was just pricing and my often and you're really does not want to do a switch because it's you know, the amount of work to make a switch?

BEN

6:57 Right.

DAVE

6:59 That, that's a big push factor also.

BEN

7:02 Yeah, you know, but what about all the work? I mean, because you guys are already gonna have to switch to Simpro mobile, right?

DAVE

7:10 No, no, see. So nothing changes there. And really, if my guys know about it, all they have to do is download the app and log into it and it's already there there, you know, it's the same same thing. It's just a different setup.

BEN

7:22 Okay.

BEN

7:27 Gotcha.

DAVE

7:28 But it has hang up. So, like if I don't clock into my job today and I want to, and then tomorrow, I'm like, you know, I didn't put in my time for ESC, I can't do that. Not mobile.

BEN

7:39 You can't interesting. You can't edit.

DAVE

7:42 You have, no, I have to, I have to call the, in the world. If I clocked in, I can edit previous days but I can't edit because they didn't clock in that day and I'm not

allowed to do anything if I didn't clock in that day.

BEN

7:55 Gotcha. Gotcha.

DAVE

7:56 So, it's that and then in the quote process that you to use the catalog, we deal with way too many parts that we don't yeah, we're not just on the catalogue. We, when I do quotes, it's pretty much all one off item and I, you know, I just put a tiny description, the price and then I have to double check my markup and have to mess with the markup instead of having a tiered market, you know, like In-app because it has tiered market as long as it's coming out of the catalog, but it won't work for a one off item like dumb stuff that they're like, you know, I shouldn't have to screw with that. And then I don't know how often does a quote go out that doesn't have the proper markups on it?

BEN

8:07 Right?

BEN

8:18 Right.

BEN

8:36 Gotcha. Gotcha.

BEN

8:44 Right. Right. So, so it does, it lets you make one off items, but it just, it's not, it's kind of cumbersome to do. So. Is that right?

DAVE

8:46 You know? So how much is in there?

DAVE

8:55 No, it's easy to make the one off item, but it doesn't put the right market. It has a default 75 percent, but I mean, that's we have like 10 different tiers of go depending on the value.

BEN

8:59 Okay. Gotcha.

BEN

9:09 Gotcha.

DAVE

9:10 You know, it should do that and most companies operate that way, you know? So I don't know why it make it, can't do that?

BEN

9:16 What about, like, what about like parts management? How was it for?

DAVE

9:21 But we don't really do parts management because we don't really stock stuff on our truck. We start very little, almost everything we get is, you know, we go and go out and purchase it and, you know, and that's why we don't want to roll out a catalog because we would that have too many different items to try and manage that. It's yeah, too much of a pain.

BEN

9:23 Gotcha.

BEN

9:32 Gotcha.

BEN

9:44 Gotcha. I wait. So how you text reporting parts back to the office now, Ben, I like say they go out to a parts warehouse, you know, get whatever they need are they like taking a picture of their receipt and catching up to the work order? Okay? Gotcha.

DAVE

9:57 Yes. So, yeah. So what we do is... we can generate the po, but then we take and just take a picture of the receipt and then I email it back to the office just with the subject line, is the po, then they handle it from there.

BEN

10:18 Gotcha.

DAVE

10:20 And right now, we're that was another thing we're kind of trying to figure out is I don't think I want them to attach it to the job because they all attachments visible to the customer and I don't want the customer to end up with the receipts and start questioning the price.

BEN

10:38 Anyway, but why don't but then do you have someone double checking the receipts before you send them out afterwards?

DAVE

10:47 Yes, but we can email or work order right on the spot which is just a work order. It's not gonna have pricing. It just has basically hours description of work. I'm just realizing there.

BEN

11:00 And so if they attached to the job and then just email at the work quarter, then it's gonna write on the work order. Have the receipt out here.

DAVE

11:06 Yeah. And then the girls in the office, we'll do the actual invoice and I'll get if later.

BEN

11:11 Interesting. Interesting. Okay. Yeah, that makes sense.

DAVE

11:15 So, I know there's a lot better stuff to use.

DAVE

11:22 The question is, you know, how much is it? And, you know, like if it's three times the price, there's no way they're gonna make a switch.

BEN

11:29 Right. But how many man hours or you're going to be saving by like not have to deal with like, you know, emailing a new receipt back to the office every single time you buy a part, and then having someone else, you know, go back in, you know, attach it to the, find the po number, find the associated po in your system, you know, attach everything in?

DAVE

11:51 Yeah, no, I get it. And these are arguments I've already battle and.

BEN

11:57 Right, right. I guess I'm not trying to win you over here. I do, you know, here's the thing, right? Is we run into this fairly frequently. I guess, so you try, did you try to get them? You tried to get them on the demo and they just weren't even interest?

DAVE

12:14 No, we did a demo with another form.

BEN

12:17 Okay.

DAVE

12:19 I'm trying to think what that platform is... but it was no.

BEN

12:22 Build apps?

BEN

12:26 Probably not even because that's just another residential platform field connect.

DAVE

12:29 Nope.

DAVE

12:33 Nope.

BEN

12:33 After that wouldn't make any sense if you guys are, what is.

DAVE

12:37 Hold on, I got it written down over here, but it was, it did a really good job at it seemed like it, did, you know, like nine percent of what I was looking for, everything I brought up to them, they, you know, it's like, yeah, no, we do that. We do that. We do that. And then the demo though the demo less some questions because.

BEN

12:39 Simpro.

BEN

12:48 Right.

DAVE

12:59 There were some things that kind of stood out like, I don't know.

BEN

13:04 Huh.

BEN

13:08 What was the, what was it?

DAVE

13:08 It was, it was BuildOps?

BEN

13:11 Was BuildOps? Okay. Gotcha. And what were the things that we're kind of up in the air with them?

DAVE

13:12 BuildOps? Yeah.

DAVE

13:24 I'm trying to find it now.

BEN

13:32 Right.

DAVE

13:48 Shoot. And I think they, I think most of stuff answered and accounted for.

--- Pricing ---

DAVE

14:05 But they were there about three times the prices.

BEN

14:09 Yeah, I know they're pretty expensive.

DAVE

14:11 As Simpro. So that's why it was so basically my flight was Simpro only at on the connect platform. Simpro only operates to about, I would say 60 percent of what we want it to do, then BuildOps was like at least 95 percent. So, I mean, it was down the price at that point in there and I know there are negotiable on the price. But then office manager reached out to Simpro and found mobile. And then we've been trying out mobile. And mobile does do probably like 85 percent, 90 percent of what we want but it still has some hang up.

BEN

14:13 Yeah.

--- Pricing ends ---

BEN

14:51 Have you, have you kind of reopened the conversation at this point? I've tried mobile and we still have these issues in a time to look back at other stuff.

DAVE

14:58 So, yeah, this is, we're still working on this. I mean, it's all in the last like two months that all this right now. So we plan on rolling out mobile to all the technicians

because it's better still in any way you look at it.

BEN

15:07 Right.

DAVE

15:23 But, yeah, it would have to if we switched, it would have to be something that's gonna handle everything, make everyone's life easier. And one way or another.

BEN

15:31 Right.

DAVE

15:33 And then, you know, which in turn is saved me.

BEN

15:36 Right, right. Well, here's, what I'll say, you know, full disclosure, right? You know, my job is to reach out to things like you guys and kind of figure out like, okay, what's the best way for us to kind of start a conversation with again? I'm with you guys again, if you were me, what would be the best approach for me to like, I don't know. Is it a, is it a timing thing? Is it, I'm reaching out to... your people at accounting thing?

DAVE

15:53 Sure.

DAVE

16:04 No, no, no, that's a timing thing right now.

DAVE

16:09 Because we're gonna try out mobile and see how that works out for us. So probably, yeah, definitely through the rest of the year, we're gonna either hate it or be able to deal with it.

BEN

16:15 Okay.

BEN

16:24 Right.

DAVE

16:26 And then also, you know, if it, if it's well, fairly good and the girls don't have to change, then it'll be a, yeah, it would be you, I would say you'd be wasting your time,

try and get sale. But if it doesn't work out and it's and it is just as much headache than not. It's not going to be a waste of time because I'm gonna push the issue... and we're not gonna deal with the dumb platform. If it doesn't work, you know, like it just doesn't make sense, should be easy for everybody. And there and I and would make doesn't make sense to me is the level of technology right now, you know, my smartphone adapts to everything I do, how come platforms can't do the same? You know?

BEN

16:38 Right.

BEN

16:52 Right.

BEN

17:09 Right, right. It knows, you know, what am I my nose? What apps I use a different parts of the day and we'll put them on my dashboard to recommend it to me and stuff like that. Sorry.

DAVE

17:19 Yeah, I wouldn't expect that kind of level of technology but just apps that would work seamlessly and be able to have many options have, however I want to set it up, you know?

BEN

17:21 Right, right.

BEN

17:27 Right.

BEN

17:30 Right. Exactly. Well, yeah.

DAVE

17:33 So, I, you know, I don't know what the limitations on that is, but to me and my little brain, it seems like it shouldn't be that difficult.

BEN

17:41 Right. Right. No, I get that. I get even as someone who works, you know, at a company that's you know, but I asked for lack of a better word to develop this. I still on like feel like we should be farther along here. But yeah, either way, let's do this. I'm gonna keep up with you guys. Probably, I would say definitely stop by our Booth at the, in France. I don't have a Booth number right now. I was trying to find it but couldn't... so, I know Mary Beth, who is our southwest representative. She had her California, but she covers the rest of the southwest. I know she's out there. I would

guess that Lauren is out there, but I'm not 100 percent sure. But yeah. And then we'll have a few people out there. I can shoot you an email actually if I can find the information and yeah, definitely stop by.

                              DAVE

18:07 Yeah.

                              DAVE

18:11 Who's who's going to be out there?

                              DAVE

18:40 I'll find them. Yeah, I'm gonna walk the whole floor anyhow, so, I mean, I'll find them and then I'll yeah, I'll touch base. I'll see what they see, if they could show me there the latest.

                              BEN

18:44 Okay, cool.

                              BEN

18:51 Sounds good. Alright. Well, either way, Dave, I appreciate you taking the time to talk with me and I hope to talk with you in the future.

                              DAVE

19:01 Cool. Have a good week.

                              BEN

19:02 Alright, you too. Bye bye.

                              DAVE

19:04 Bye.

The End