



Call with Goforth Plumbing & Mech LLC - Casey .

Henry Drake with Goforth Plumbing & Mech LLC
Recorded on 4/26/22 via SalesLoft, 7 min.

Participants

SERVICETRADE

Henry Drake
SDR

GOFORTH PLUMBING & MECH LLC

Casey .

Topics

<i>Accounting integrations</i>	0:57
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Transcript

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

CASEY

0:00 Thank you for calling Goforth plumbing and mechanical. If you know your party's extension, please dial it at any time. If you'd like to place a service call, please press one. If you're a current customer and have questions or need to pay an invoice, please press two or press zero for the operator.

CASEY

0:20 Please hold while I try that extension.

CASEY

0:36 Go forth plumbing. This is Casey.

HENRY

0:38 Hi, Casey. This is Henry calling with service trade. How are you doing today?

CASEY

0:43 I'm doing fine.

HENRY

0:44 Good. I was talking to Amber last week service trade, like our service management platform. It's built for the commercial industry, and she told me you'd be the person I would need to talk to that, correct?

--- Accounting integrations ---

CASEY

0:57 Yes, it is.

HENRY

0:58 Okay, awesome. Yeah, she informed me that you guys are using Quickbooks as well as T sheets for your work orders. Is that correct?

CASEY

1:07 No, we don't use Quickbooks anymore.

HENRY

1:09 Gotcha. What do you guys currently using?

CASEY

1:12 It's another accounting software. It's kind of have a local company. It's a third party resellers that we went through. It's called a systems.

HENRY

1:19 Okay. Well, okay, awesome.

--- *Paper process* ---

HENRY

1:22 And are you guys, what are you guys doing for work orders? You guys still using T sheets for that?

CASEY

1:28 For work quarters? What exactly are you referring to?

HENRY

1:34 Like when your text out in the field, are they filling out like a piece of paper with, you know, what they're kind of doing? Or is that something that's online?

--- *Type of work* ---

CASEY

1:44 We don't do a lot of service, our service, mostly just current customers that we do preventative maintenance and small service work. We don't do any residential, that sort of thing. So, we only have a few service techs and they currently use go canvas. So it's just a paperless way of sending, I guess work orders to them dispatching, and then I'm sending it back to the office once they've finished doing the work.

HENRY

1:52 Right.

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

HENRY

2:15 Okay. Gotcha. Yeah, I'm not too familiar with go canvas. I was just calling you right now. We're doing these, you know, 30 minutes to an hour, Zoom demos, just to kind of give you guys a look at service trade. You know, see how it could help your business or if it's you know, it's not a good fit. No sales pressure. You have any time on your calendar next week or two for that?

CASEY

2:36 Yes, I believe I could do that. One thing I would not be interested in is integration. I recently just looked at another service company.

--- *Accounting integrations* ---

CASEY

2:47 I don't remember the name of it. Actually, it was sitting there trying to remember. I went to the Las Vegas HR expo, and they actually were out there at... the expo at the time. So, I did a demo with them and they wanted to integrate with our accounting software. I, you know, I don't want to do anything like that or if there's a workaround than, yes, that would be interested in doing a demo.

HENRY

2:47 Okay.

HENRY

3:11 Right.

HENRY

3:16 Okay. Yeah. So, I mean, we can do integrations. I don't believe it's required. I can double check on that and get back to you. It's also something that territory manager that you'd be meeting with you go into detail about that. She knows a lot more than I do. Yeah, I don't believe that we, you know, requiring integration.

CASEY

3:23 Okay.

--- *Type of work* ---

CASEY

3:37 Okay.

HENRY

3:39 So, you guys are in Oklahoma? Is that correct?

CASEY

3:42 Yes.

HENRY

3:43 Gotcha. And how many service Textio, huh?

CASEY

3:47 At the moment between HB AC and plumbing side, we have one two.

CASEY

3:55 Five, I believe it's not six out of our 90 employees.

HENRY

4:00 Okay, perfect. Yeah. Let me just pull up the calendar real quick.

--- Type of work ends ---

HENRY

4:05 With this week work better for you or next week?

CASEY

4:10 This week would be fine.

HENRY

4:11 This week. All right?

HENRY

4:15 Let's see you guys are in Central Time. Is that correct?

CASEY

4:19 Yes.

HENRY

4:20 Righty. How would?

HENRY

4:23 Let's see?

HENRY

4:27 Three PM?

HENRY

4:30 No, sorry.

HENRY

4:35 Two PM for you guys. Would that work two PM on Friday at 29?

CASEY

4:41 Two PM Friday? Yep. I have that.

HENRY

4:45 Alrighty. Well, I can go ahead and fix that for you. What's a good email for you?

CASEY

4:49 It's Casey spelled C a SEY at Goforth Plumbing & Mech huh?

HENRY

4:58 Alright. And you said how you said Casey at Goforth plumbing? Dotcom?

CASEY

5:03 Yes, that's correct?

HENRY

5:04 And I know you said you guys were looking to any, was there anything else that you're really looking for in a software?

--- *Type of work* ---

CASEY

5:11 Something that could help with scheduling most at, and preventative maintenance services? No like yearly, long contracts filling those out?

HENRY

5:14 Okay.

CASEY

5:22 I don't know where they're interested is bad thing. But that kind, have, we would like something as a collaboration right now, they use a text messaging system and they also use Microsoft teams and...

--- *Access to information* ---

CASEY

5:37 It's kinda messy. So really if there was a way for those teams to collaborate, you know, in real time, we each other through app, that would be very beneficial. Our guys. Yeah, I mean, I'm sure you'll see that there are more based. They don't work on desktop computers. So, anything that's mobile friendly?

HENRY

5:52 Okay.

CASEY

6:01 And what did you say? Is it service tech? But did you trade? I think I've heard of service trade. The last company, I did a demo with BuildOps, so.

HENRY

6:14 Okay. Yeah. I know they're fairly new and you just started up in the last couple of years.

CASEY

6:21 Yeah, we've heard a lot of good things, but really they wanted everyone to be on the same system and integrate what we were doing with our accounting system completely through the software and I don't want to do that, so.

--- Accounting integrations ends ---

HENRY

6:39 Right.

CASEY

6:40 Yeah.

HENRY

6:41 Okay. Yeah. Well, I'll write that down and make sure that, you know, Ben, we'll go over that as well as, you know, the dispatching scheduling, all that. So I'll go ahead and book this right now for you and you should get an email if you just press yes on the email. So I know that you got the confirmation, that would be fantastic.

CASEY

6:50 Okay.

CASEY

7:01 Alright. Sounds good. Thank you.

HENRY

7:02 Alright. I appreciate it. Okay, bye.

The End