



ServiceTrade Sandbox Call

Clint Mathis with Five Star Mechanical - WA
Recorded on 5/30/23 via Zoom, 26 min.

Participants

SERVICETRADE

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FIVE STAR MECHANICAL - WA

Andy Stahl
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OTHER

12538528284

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Transcript

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

LAUREN

0:00 Okay. And...

CLINT

0:02 Want to bombard them? I knew that other thing went out. So I'll give him a second. If not, I'll give him a quick call.

LAUREN

0:10 What, what did you have planned? I basically just pulled up the link from that email, just make him ton up while we are on in there.

CLINT

0:18 That's not happen.

LAUREN

0:20 Okay. And then I was gonna sign them up for the, think that courses as well.

CLINT

0:24 Yes.

LAUREN

0:25 Okay.

CLINT

0:26 And then the only other thing I would be like, is if he wants us to create anything, it didn't sound like last time he cared about it. But if you wanted to send us like a copy of a work order or something like that?

LAUREN

0:38 Perfect. We're on the same page here, you?

CLINT

1:38 Says he's trying to connect the audio.

1:44 Hey, what's up, Clint? Hey, Lauren. This is hi.

CLINT

1:49 How are you doing?

12538528284

1:50 I'm doing good. I think that other participant up there that's just the phone number that that's me.

CLINT

1:56 Got...

12538528284

1:56 Worse. I dialed in. I didn't sync up to my name there.

CLINT

2:00 No sweat. How are things going? How was your weekend? Do you have a good time? Do you get to do anything fun? How about that?

12538528284

2:08 Yeah, yeah. Weekend was good. We, we had the Monday off here and just hung out at home and just did like home improvement projects pretty much nothing too exciting or travel or anything. So.

CLINT

2:22 So, funny. I used it when we got our house a few years ago, I would always be doing a bunch of home stuff and fixing it up. Hadn't done anything in a while as my kids got older, it's been consumed by soccer tournaments and whatever play dates they have.

12538528284

2:36 Yeah, definitely.

CLINT

2:40 Well, good. I know that what we planned on doing for the meeting is pulling up that email we sent. I know you've been busier than anything. So feel bad for you with all the projects that you're having to deal with right now, but I know this is important to you guys too. So we wanna make sure we got with you, be able to pull up. I think Lauren is gonna pull up that email and then let us try to go ahead and get everything set up, see if you're comfortable with everything, see if any questions you might have and things of that sort. Does that sound good to you?

12538528284

3:11 Yeah. And it's and it mainly wasn't, the number of projects that, was overwhelming for me. It's just, the role of being, in the main form of contact and the project.

CLINT

3:21 This is every day life.

12538528284

3:23 Yeah. So, yeah. It wasn't really just that. So I've you know, take some time to communicate that to the rest of my team here and they've been very helpful and just stepping up and what not?

CLINT

3:36 Yeah.

12538528284

3:36 Yeah. Okay. Well, and I did get that email. I'm just pulling it up on my side here too.

LAUREN

3:43 Awesome. Well, what I can do once you've got that pulled up is kinda walk you through a few of these links and we can use, we can use this time.

--- Implementation and ongoing support ---

LAUREN

3:53 You could actually, you know, click that service trade trial account link and actually create your account. You may wanna read through the, our end user licensing agreement that's part of signing up for an account, but we included a few resources here. And then while I had you on the phone, I was actually gonna sign you up for our certification program which is a great resource use to get you started.

--- Implementation and ongoing support ends ---

LAUREN

4:18 But the first thing you'll see is basically just a sign up form to give you the opportunity to create your sandbox account, select the type of work that you do. And then down here at the bottom would be the terms of our end user license agreement and information related to you specifically, user name, password, and stuff like that. And then once you, you've signed up, you'll be able to have your very own service trade house with no furniture.

12538528284

4:51 Okay. Questions about that. I saw the very bottom. It said something about like just 20 accounts or 20 jobs per month. Is that, is that like, the limitation of, the trial sandbox environment pretty much, yeah.

LAUREN

5:09 Not like a hard limitation where like it'll ping us if you exceed that, well, I'll kinda check in on your sandbox just to kinda see what you've done generally, that 20 per month, is it's like somebody's like signed up for a free account and just want to use it and like not pay us like we'll be able to kinda run reports to see like if they.

--- Accounting integrations ---

12538528284

5:32 It should.

LAUREN

5:33 Should be paying us if that?

12538528284

5:36 I got you. Yes.

LAUREN

5:41 Some of some of the limitations with this is like it's not going to, it's not gonna allow you like connect with your accounting system or anything. You won't have access to our API, but you can always find this by googling ServiceTrade API to kinda figure out like different data points that you might want to hook together.

--- Accounting integrations ends ---

LAUREN

6:02 But, but you'll be able to kinda run unlimited jobs, quote things like that. The part management stuff is also something, that you wouldn't be able to test just because it is like, a separate log in. Okay. So.

12538528284

6:21 Same with the Northboundary is that, that's a separate log in.

--- Implementation and ongoing support ---

LAUREN

6:24 That's correct. It'll all be the same. We're working on single sign on for all of our products which will be available later this year. So this is just the core service trade sandbox.

12538528284

6:37 Okay. That makes sense.

LAUREN

6:38 Yeah. We did provide you access to our support site which is an awesome place to get started there's. Actually like right at the top getting started. And for you, I think that admin for the office staff is probably the best place if, you know, I think you'll kinda figure you step out as you go. But if there's anything specific you have questions about like how do I do this? Like you can search this global search here or there's kinda articles kinda sorted by that by topic. And then again, I'll get you signed up for some of the service certification. So you have those as well at your disposal.

12538528284

7:19 Okay. Yeah, that's very good, to see this kind of stuff because it's that's just something that's you know, important to me like, you know, going through the initial implementation and then day to day use.

--- Implementation and ongoing support ends ---

12538528284

7:28 I wanna see what it looks like to look. I don't know how to do something. What's it like looking it up is I have seen all kinds of different qualities of documentation over the years and yeah, I go ahead of time.

LAUREN

7:42 You'll be able to access that through your sandbox account, through this help button right here.

--- Implementation and ongoing support ---

LAUREN

7:48 The help button just brings you right to the dashboard. And then of course, there is a support widget which allows you to type in a question and it'll say, hey, this is what I think you're asking. Does this answer your question? And it'll kind of feed you the article and then, if it doesn't obviously, you know, once you're live as a client of ours, you'd be able to leverage, our customer success organization, for any frontline support that you might need.

12538528284

8:19 Okay. Yeah, that's good to know.

LAUREN

8:22 Yeah. And then any other questions about this or anything else before I get signed up for these starts?

12538528284

8:34 Well, somebody, in the last time we had a meeting just here internally, with everybody on all the department heads, somebody talked about just getting a little bit more of our data into there like a, into a test environment and that link on your screen there that says bulk importing data. I'm just curious, what is available there, in the trial environment like bulk import tool available? Yeah.

LAUREN

9:01 It is that's something that is part of the implementation process that we can actually help you with. But for the purposes of a trial, you're far more technical than most people we talk to. So there's this article is really super helpful. And this video kinda shows where you'd access bulk import and it would be available in your account by just coming over here to customers and bulk import.

--- *Implementation and ongoing support ends* ---

LAUREN

9:25 You would then have access to all of the import templates for like your locations, equipment, things like that. And of course, if there's information that you'd like for us to import for you or like just set up like what some people will do is they'll just say here's like four work orders, like can you add these in our sandbox account? And then, you know, it'll be good to go. So so you can kinda choose your own adventure there?

12538528284

9:51 Okay. Yeah. I did see that note in the email, that asked about sending over a sample work order or two so we can replicate them in your trial account. And that would just be something like here, I think our term for a work order is more like a dispatch and it's just like, you know, yeah, work order service request, whatever. And... yeah, we're happy.

--- *Type of work* ---

LAUREN

10:16 To help you with that, if it would be valuable to you, you've got a lot of irons in the fire.

12538528284

10:24 Yeah. I think I'd have to look at two different types like maybe an emergency service call and maybe like a PM like the preventive maintenance contracts. Those two would be a good, yeah, two types of calls to send and just see what it looks like in the system.

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

LAUREN

10:43 Yeah, we're happy to, we're happy to input anything that you need there. So just send over anything that would be helpful. Once you signed up for your account, I'll be able to access it and I can put stuff in there.

12538528284

10:55 Okay. I see the middle link there. It talks about the certifications I think incorific or think of or something. Think of it. Yeah, think of it. Okay?

--- Implementation and ongoing support ---

LAUREN

11:10 Yeah. So what I can do, the certification, this is like my admin dashboard for think, but the service trade pull this up service trade certification. Let me see here the certification program. We have courses specific to certain user types, and we have technician specific training, admin or office specific training, and then admin specific training. So as a service trade client, you'd have access to all of our certifications and you'd be able to send your team through them for the purposes of onboarding not just onboarding with service trade, but like say you hired a new employee. It's a great way for them to learn the service trade application.

--- Implementation and ongoing support ends ---

LAUREN

12:02 So I was gonna get you signed up for your very own certification. You'll actually get an email from giving you the basically saying like, hey pick your password and things like that. And then if I come in here... five, nope... are mechanical. Can you remind me of your email address? I just, I'm not looking at it.

12538528284

12:33 Yeah. It's Andy at five star. Me like my CH dot looks like I got fire star, me in there.

LAUREN

12:43 I don't know why I keep doing that. Let's see five.

12538528284

12:46 I do that all the time if I get like typing anxiety and.

LAUREN

12:52 I do it again. I must fire a whole bunch five or call.

--- Access to information ---

LAUREN

12:57 Okay, there we go. So I'll set it. So you set your own password. I'll get you in the office, the mobile app course and the admin course and we'll set that through. Usually we do like two weeks, let's see. Is that gonna be enough time? Do you think for you to do some testing?

--- Access to information ends ---

12538528284

13:19 Yeah, that should be enough time.

LAUREN

13:20 Okay. All right. So I've enrolled you in those courses and then you'll get a welcome email basically letting you know you can, that you can log in there, set your password. So you should have that now.

12538528284

13:35 Okay. Yeah, it should just come through here a little bit.

--- Implementation and ongoing support ---

12538528284

13:40 Yeah, I did see that, there was some of those courses just kind of freely available, on the website and are these like the ones that are sorted more behind the scenes? Not like you have to register for? And where did I see those?

LAUREN

13:55 We have... on the website, there may be like previews of these courses, but these are like, the official courses your team would need to be enrolled in those courses. And the nice thing about that is you'll during your onboarding, you'll actually have a dashboard where you can track your team's Progress with those courses. There's also sort of like project management... from like the onboarding perspective where your service trade, project manager can assign you tasks to do like send us your data and likewise, they'll assign themselves as that say like review data, confirm like completion of courses, things like that. So you'll have a lot of really great resources to help you throughout your implementation both from a training perspective and like the implementation perspective.

12538528284

14:54 Okay. That's good to know. That's something I've always been curious about is what's it's just, it's tough, to just grasp it. I guess is just how, the whole project management of the implementation is gonna go down. Yeah, because, you know, here I'm just the one guy but yeah, I would, yeah, probably be having, to interact with the different departments here and then interacting with different departments of service trade and is just like all these moving parts.

LAUREN

15:23 Yeah. You'll you'll actually work with your project manager to kinda come up with a time line from like the time that you have your kickoff call to the time you go live here's, sort of like the steps that you'll agree upon to go through and who should be trained.

--- Implementation and ongoing support ends ---

LAUREN

15:40 And when, and then the dashboard actually will kinda track your overall Progress. And this is just like a screenshot from our dashboard but it'll send you reminders. It'll kinda give you Progress updates and things like that.

15:56 Okay. Yeah. That's good to know. Yeah, because I've been working on this for a while here. So it's good to see portal that's there because the last time we were working on this, it was with data basics and Simpro, and there was just there's just nothing. Just, no, no tracking of it. There's emails back and forth and stuff would get lost in the weeds. Yeah, that's tough.

--- Implementation and ongoing support ---

LAUREN

16:22 Yeah. We, we found we saw a need for it and we actually just developed this dashboard internally. So, you know, this is going to be our dashboard.

12538528284

16:31 That's what we did. Okay. And just another question related to the implementation project, what types of... what types of employees do you find that you work best with to have a successful implementation? Like on your team? Yeah.

LAUREN

16:56 Generally, we're working with folks like you who are, the technical guru, sort of the keeper of the data. What would be like our main point of contact here? You'll probably want like a cross functional team, to help you tackle, the parts of the business where service trade may overlap.

--- Accounting integrations ---

LAUREN

17:20 Like for instance, someone from accounting to help you with like data mapping between service trade and your accounting system, is your...

12538528284

17:28 Accounting system Quickbooks. Yeah.

LAUREN

17:31 Okay. Yeah. So, so we'll want to engage someone from accounting to kinda help with the data mapping. Generally folks from like the service management side of things.

--- Accounting integrations ends ---

LAUREN

17:42 So like Jim's role to kinda confirm like the data cleanliness, when you like for instance, upload your customers equipment list, like someone, who has like, a discerning eye, for catching like information specific to service. You may have some overlap with like the coordinators and dispatchers when it relates to like how like thinking through like how you conceptually want to use service trade from a training

perspective, when you create your ops, but generally, there's like a core group of like three or four people who tend to be more on the administrative side of things that kinda oversee, the entire implementation.

12538528284

18:27 Okay.

CLINT

18:28 From a, from a permission standpoint, so obviously, usually those people come in to say, hey, I want my dispatchers to be able to see this information. I want management to see this information. And then, you know, being able to see what they need, what's relevant to their job. That way they don't need to see everything type of thing.

--- Accounting integrations ---

12538528284

18:47 Right. Yeah. We got that. We have, our current software has some of those controls in there, but it's very limited and it's just what I think one of the biggest things about our current software is that it doesn't track who does what when?

CLINT

19:00 Just...

12538528284

19:00 The data is just there.

--- Accounting integrations ends ---

12538528284

19:02 And if you look at it, you guys have no idea who changes it or when sitting there exactly the same for 10 years. So, who knows?

LAUREN

19:09 Yeah. You'll have an entire audit trail and service trade to help with stuff like that?

12538528284

19:15 Yeah. The previous demo. Yeah. Well, that's all good to know here.

--- Implementation and ongoing support ---

12538528284

19:21 So, I think for, as for going forward from today, I think we would just need, I need time to go through those certifications and then I signed up in the, for the trial account and I'll click around in there a little bit. And then, if I run into something where I want to, I think I'd want to click go through the certification and click around, in the environment on my own for a little bit. Yeah, for sending over a sample work order to see what's there and whatnot...

LAUREN

19:50 Totally. That's that's the order that I would do it. Then, I would create your account, the certification courses for you. I'd start with the office view... and just because it kinda walks through how to set up a location, how to set up a customer and things like that, how to set up job.

--- Access to information ---

LAUREN

20:09 You are gonna want to download the service type mobile app to have like a iPhone or an android device, just something to test like the mobile app out on once you have created a job for yourself. And then, the, again, the certifications do a great job of kinda like remember there's like sing along from disney.

--- Access to information ends ---

LAUREN

20:31 It's kinda like you like follow along. There's. No music involved, I promise. But you like can follow the bouncing ball and it'll be like now pull up the location page. And so, it's pretty well. Got, it may be a little simple for someone like you, who is a bit more technical but it's a good place to get started.

12538528284

20:49 Yeah, yeah. I think I'd want to do it at least once just so I know what's going on and then also what kind of training everyone else is gonna see. Yeah.

LAUREN

20:57 Sure.

12538528284

21:00 Okay. Any other questions? I don't think of any right now? I know Terry, she's our controller here. He's interested in doing another demo, with Sage and because we've done... yes agent, we've done a couple of demos and we've had Mike per from ethosystems in on all those. And then I believe Tonia from service trade has been in on one or two of them. I think, we want to see more about and I'm gonna send a separate email about it. I wanna see more about like the just sort of the, each side has been either kind of more service trade focused or more Sage focused but we wanna see more like the life cycle of data like in terms of payroll, I'd be interested in seeing something like... the life of technicians paycheck basically starting from when, they clock and do a job till the check, is generated all those steps in between... where the data gets input initially, where it lives here and transferred.

--- Accounting ---

12538528284

22:16 But I'm gonna type all that up in a separate email. Yeah, to set up another demo with Mike and possibly Tanya.

LAUREN

22:24 I include Tania because she, I don't know if Mike has access to service trade or not, but I know Tania has access to both service trade and intact and can actually show, the pushing of information from service trade into impact. I would definitely include Tania on that, and we'll ping her just to give our heads up too.

--- Accounting ends ---

12538528284

22:44 Okay. Yeah, I'll definitely include Tonia on there, but yeah, we probably wanna do that and Terry said that like next week would work good for him. So, okay, I wanna do something next week, but I'll send out a note on that.

CLINT

22:57 And if you want, you can add us to that if you want to that way I can make sure nothing slips through the crack on our end and people are knowing where to be at what time and all that stuff as well.

--- Purchase decision ---

12538528284

23:09 Okay. Yeah. I'll see you guys on there. Perfect. I don't think I had any other questions. I've got lots of good info here. We're still we're still kind of looking at just service trade and BuildOps, but people are kind of leaning more towards service trade here. Yeah, we got all these demos, to go over and look at.

--- Purchase decision ends ---

LAUREN

23:33 I'm sure. I know, I think Clint mentioned that you were going to have department heads reach out to us if there was something specific they wanted to see. Have you heard any rumblings of any, anyone in particular wanting, to reengage?

12538528284

23:47 No, I haven't heard anything yet. But I'm gonna send out an email to the group, with the contact info for service, trade, Sage, Bill ops. And then, if they want to schedule something, they'll reach out directly and I'm gonna tell them in there, me on it as well. So I can be in on it. Yeah, basically part of, the last discussion we had, as a group here where I was, you know, asking for a little bit more help with and that was, the solution kinda was if people wanted to schedule something for just their

team, they would reach out directly... preseh, I'll send out the info, but I haven't heard anything specific yet, on that part.

CLINT

24:32 And I know we have a lot of moving parts and I know you guys are gonna be looking at Sage and stuff like that and you're going to set that up based off the emails you're sending? When do you think would be a good time for me to just have a touch point with you to see if you need anything, answer any questions or just to see how the process is going and what we need to do, to help you out?

12538528284

24:52 I think, that, I know Lauren set me up for two weeks and that for that certification, I think, when that runs out, would probably be a good time to check in and see where we're at.

CLINT

25:03 Yeah. So I'll reach out that week of the twelfth or whatever, because I think it ends on the thirteenth. So perfect. Yeah.

12538528284

25:09 Yeah, that works for me.

CLINT

25:12 It's so funny because I'm actually going to be in your neck of the woods for some other meetings I fly in. I think either the thirteenth or the fourteenth. Okay? So it'll be a good time to chat with you as well just to see if you need anything from me.

12538528284

25:27 Sure. Yeah, that sounds good.

CLINT

25:30 Okay. Well, thank you for your time, Andy. I appreciate you jumping on just makes it easier if you can talk all this stuff out and instead of assuming stuff.

12538528284

25:37 Yeah.

CLINT

25:38 We know where that takes you.

12538528284

25:39 The email, yeah. Yeah.

CLINT

25:41 So, well, good. Don't hesitate on any emails or anything once you get playing around and you have any questions, just let us know and we'll walk you through and try to help out in any way we can.

12538528284

25:54 Okay. That sounds good.

CLINT

25:55 All right. Thanks, buddy. Take care Andy.

12538528284

25:57 Thanks you too bye.

The End