Call with Consolidated Controls, Inc - Tom Cleary

Aaron Ward with Consolidated Controls, Inc
Recorded on 4/25/22 via SalesLoft, 11 min.

Participants

ServiceTrade

Aaron Ward
Territory Manager

Consolidated Controls, Inc

Tom Cleary

Topics

Transcript

TOM

0:00 Hello?

AARON

0:00 Hey, Tom.

TOM

0:02 Yes.

AARON

0:03 Yeah, it's Aaron from service trade. How's it going?

TOM

0:06 Good. How are you, Aaron?

AARON

0:07 Good. Just checking up on, you know, it's been about a week, alright. Talk to you last week. It was like Tuesday, but, yeah, just trying to catch up with you, see if you're still evaluating things or if you've made any decisions.

TOM

0:12 Right.

TOM

0:22 So, I have been a little bit of everything and I feel like right now I want to go with, I'm gonna go with the BuildOps system.

TOM

0:35 One of the selling points that I really like is that they have a custom form, so to speak for output to my customers.

TOM

0:47 Regarding the quotes and the final report?

TOM

0:54 You know, and originally, the final report wasn't so much something that I thought was going to be important, then it turns out that it is.

TOM

1:05 So, I'm gonna try them out and we'll see how we go.

AARON

1:09 Okay. Gotcha. Okay. So, it sounds like it wasn't price for you then?

TOM

1:15 No, you know, it's still a lot of money and I was able to negotiate them down. It's still the most expensive that I looked at out of everything, I ended up creating a little spreadsheet for myself to compare basically the final three. So to speak, you guys being one of them. Alright, great. Okay. Hold on maybe. So, you know, that's...

TOM

1:43 It didn't I don't want like.

TOM

1:46 Just a data dump and I didn't want...

TOM

1:52 To end up doing the extra work?

TOM

1:56 In the guys inputting everything and then having to create a report thereafter was something I want to try to eliminate in the business, you know, keeping everything digital?

AARON

2:05 Yeah. Right now, you cut out just a little bit there for a second. But is the report? Is it, I'm not really sure what it would look like. Is it that, do you remember we had the service link? It's kind of like the job summary of everything that happened on site? Is it much different than that?

TOM

2:13 Yeah.

TOM

2:26 Which is, you know, that's a plus on your side, it's you know, I have a very like specific form and set of forms that we use that I don't really want to deviate from. I'd like to recreate in some manner, but so that it looks like, you know, we've spent time at your site, you know, as I said, we were very niche business and we charge a lot of money for our services and consider it to be a premium service. And that's I don't

just take anybody who calls me off the street and say, yeah, sure. I'll do business with, you know what I mean?

AARON

3:02 Yeah.

TOM

3:08 You know, because of that, I really want my end product needs to match, you know, the type of service we provide and I don't feel that you guys currently have that ability.

TOM

3:23 There's kind of like workarounds and this and that, and that's not really what I'm looking for. You know, the most, everything else of the software and I don't have the spreadsheet in front of me. I really digest it kind of near the end of last week. I had about three, four hours and I kind of ran through it a bunch of times and looked at my notes and all that.

AARON

3:43 Yeah.

TOM

3:45 So that, you know, that's kinds of it, you know, that and I'd be using the quoting feature because it's built in. Again, it's another time saver for me to get off paper, right? To get out of going into word and messing with a word document and creating a PDF.

TOM

4:06 Sending the email when they respond, you know, I don't I have no way of tracking my quotes. I have no money. I have no idea... this year, last year, no idea. So I liked that idea of being able to incorporate that into the system. But you guys had this is very generic quote that has a lot of information on it. And in my opinion, too much information for me and having and again, not being able to edit that document per SE or have a template that I can use to send out 95 percent of what I do it, you know, that all that weight into that decision.

AARON

4:18 Right.

TOM

4:53 So, those were kinda the two bigger things.

AARON

4:54 No.

AARON

4:56 Right now, I think about the forms though we do have the ability if you had a generic for me to, we turn them into syllable PDF. So you could send those out after your guys fill them out to all of your customers, the filled out form.

TOM

5:06 Right.

TOM

5:12 Right. But it's not built into the software like he.

TOM

5:19 Comes off of whatever device they use or out of a Dropbox account. Like it's not in the software.

TOM

5:28 Like it's through an Adobe interface essentially.

AARON

5:32 Row, right? Yeah, you know, it's in the software when it's completed and you can reopen it in the software. But when they're actually hitting the check boxes to fill it out there using Adobe acrobat, but the form itself is kept in service trade, filled out in Adobe acrobat, and then it's back in the service in service trade filled out. And then you can re edited later in Adobe acrobat again. But the form itself, the blank form is uploaded into service trade. So, any time your guys go to any location, they can fill out that form for that site.

TOM

5:35 Right.

TOM

6:14 Right.

TOM

6:17 But I can't turn that into a report. They'd be attachments.

AARON

6:22 You'd be sending it, isn't it? Yep. You'd be sending the form to your customers.

TOM

6:22 Right.

TOM

6:26 You know, what do I, what do I do when I do maintenance at a site with 132 transfer switches are gonna have 132 attachments. Most email servers kick that shit back.

AARON

6:37 So, you would use that you would do a form for each switch?

TOM

6:39 Right. So, I have to.

TOM

6:46 Yeah. Yeah. We use a form for switch and we always maintain multiple switches. Sometimes, I have two guys on site... because we can only have one guy can only handle so many switches. So we have two guys on site that I have to fill out these forms and I have to then create one report... from the two guys that did the work.

TOM

7:12 You know, it just, it felt like, you know, and maybe we didn't dive deep enough, but it felt like it felt cumbersome to me too. You know, I need things to be meatball proof as smart as my guys are. I don't want stuff to get lost. I don't want forums to be like, hey, where's your forms? I forgot to attach them. I think, let me check, you know, like I need to know that when they fill something out, it's there and I have access to it. I don't need to Chase them for it, which is what I currently do.

AARON

7:43 Gotcha. Okay. And I'm just curious, does BuildOps have any kind of quote feature built into it? The way we do, they do? Gotcha. Okay. Yeah, I guess you just like the way their quote, the way it comes out, the way it looks better?

TOM

7:46 Right?

TOM

7:51 Yes.

TOM

7:54 Yes.

TOM

8:04 It's pretty much whatever I want. I said, I'm going to set it up with them.

TOM

8:15 You know, upfront. So to speak. So basically, when I go into the customer account, you know, I just pick my quote template, it opens it up and, you know, it

populates everything. And the only thing I may or may not have to changes a few sentences depending on or the price or maybe nothing and a way it goes.

AARON

8:36 Right.

TOM

8:40 So, and it's my format VS... it's not a generic format. Essentially, it's not, you know, it's not a generic format that everybody who's using BuildOps as it's my format, whatever I decide for it to be that's what it's going to be every time and I don't and I don't need to, I don't need to recreate it because I guess I do a lot of repetition that's like the big thing with me. I do a lot of repetition. I quote the same thing for the same kind of pricing, same like a lot. So, I have 90 to 95 percent of my quotes look the same other than the name and the address on, right? So.

AARON

8:40 I guess I just have to see and myself to see how it's yeah, it's more of a customizable.

AARON

8:57 Gotcha.

TOM

9:23 Even though you could say that's generic, it's only generic to cci.

TOM

9:30 And it's nothing fancy. Trust, it's nothing fancy. I fill it with words because the pricing is one sentence.

AARON

9:37 Right.

TOM

9:37 You know?

TOM

9:40 So, it was, you know, that feature was good was, you know... those wait heavy and my decision.

--- *Wrap-up* ---

TOM

9:50 So, you know, maybe service trade, they'll get there some day and I'll be like, I haven't done with these guys. I need something better. I don't know, I don't know.

AARON

9:40 Okay.

AARON

9:49 Yeah. Okay.

AARON

9:56 Yeah. Well, you know, I didn't want, I remember when I talked to you first, you know, you had said you were expecting a call back from John, so I didn't want to leave you hanging in there and you think that I didn't call you back. So I did, and, you know, we want to earn your business. So.

TOM

10:06 Yeah, no, and I appreciate your call. I appreciate all your time Aaron, you know, it did help it, did, you know, I definitely, you know, pulled you guys from the bottom of the pile and put you at the top.

AARON

10:21 Yeah. Okay. Well, hey, you know, if it doesn't work out there for one reason or another, you know, reach out, please. We'd love to, you know, you visited for, with you, so.

TOM

10:31 Of course.

TOM

10:34 Of course, of course, absolutely.

AARON

10:37 Yup. Okay. Yeah. Just at the quote, honestly, like the quote format isn't that customizable. I mean, of course, you know, you can make the word the verbiage templates however you want, but in terms of like the layout on the actual quote, the positions of things that's not that customizable. So, nothing I can really do about that, but.

TOM

10:55 Right.

TOM

10:58 No, I understand.

AARON

10:59 Alright, Tom. Well, hey, thanks for taking my call. Like I said, reach out if, hey, if you know anything happens over there and it's not working on, will be here. So I'll talk to you later. Good luck. Have a good week. Yeah, talk to you later. Bye bye.

                              TOM

11:03 Of course.

                              TOM

11:09 Sure.

                              TOM

11:11 I appreciate it. Aaron you too. Bye. Take care.

                          The End