



ServiceTrade Follow Up Meeting with SWK Mechanical

Susan Warren with SWK Mechanical
Recorded on 5/31/23 via Zoom, 10 min.

Participants

SERVICE TRADE

Susan Warren
Territory Manager

SWK MECHANICAL

Kevin Trask
President

Topics

<i>Accounting integrations</i>	0:33
<i>ST app contracts and pricing</i>	2:25
<i>Purchase decision</i>	3:22
<i>Purchase decision</i>	4:55
<i>Purchase decision</i>	6:44
<i>Accounting integrations</i>	9:18
<i>Purchase decision</i>	9:53

Transcript

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

KEVIN

0:00 Hey, yeah, I can hear you.

SUSAN

0:03 Hey, Sarah, that I usually, when I leave, it notifies me when someone hops in my meeting room. So I'm glad you sent me a note. How are you doing?

KEVIN

0:11 I'm good. How are you?

SUSAN

0:12 Good, good. But yeah, just wanted to, you know, check in and I know you had the time, and took a look at the Northboundary webinar and you're you know, taking a look at a few other options. So just want to hear from you what your thoughts are and kind of where you're at with things.

--- Accounting integrations ---

KEVIN

0:33 So I jumped in on in... little big there. Yeah, it's definitely work in Progress... kinda used to work in Progress with that's. How Northboundary the online version was for quite a while. So they're in, it looks like the infancy stages of integrating it right now. So it's just a basic stuff... definitely need some work there to get it to where it needs to be.

--- Accounting integrations ends ---

KEVIN

1:10 But the reporting stuff, we touched on last time... where did we leave that off? Because that was one of the things I was really interested in what you guys had to offer for reporting.

SUSAN

1:24 Yeah. Did you get my email with the links to all the different reporting that would come with enterprise?

KEVIN

1:31 I did get it and I just opened it up here. I'm sorry, I wasn't so.

SUSAN

1:36 I mean, the other piece that I did wanna level set with you on, you know, obviously we're all learning together when it comes to, you know, where we are with, you know, product, the integration. So basically my understanding after that webinar and really try like I need to understand like what happens if, you know, try to send information from Northboundary into service trade and basically the clarification that I got, and tell me if this is in line with what you heard from vent is basically, you know, we can send over, you know, the customer name, you know, location, information, asset information, but we're just not there yet when it comes to sending over actual, you know, job information, anything really past that point.

--- ST app contracts and pricing ---

SUSAN

2:25 So, you know, to get a good understanding of that. And then, the other piece, I know Progress billing, you know, billing, you know, as opposed, you know, valid percentages at certain points. I was a big kinda gotta have for you. I wanted to dig into that because, I hate offering something that isn't necessarily currently available.

--- ST app contracts and pricing ends ---

SUSAN

2:46 So I had heard that was coming relatively soon and that's why I had communicated that. But apparently just and frankly Northboundary has taken a bit of precedence when it comes to, you know, product getting that loaded in. So just to be clear, Progress billing is not something that is going to be coming down the pipe, you know, in the next few months probably not really on target for something that's going to be popping up really before the end of the year, you know, I cannot guarantee it's availability in 2023 basically.

--- Purchase decision ---

SUSAN

3:22 So I did wanna like level set with you about that if these are kind of things that are really kind of deal breakers for you. I completely understand you're never going to hurt my feelings. I didn't write this off. I just want to ask about that.

KEVIN

3:37 Yeah. I mean that's pretty critical right now for kind of what we do for business, but I mean, I appreciate the candidness on where it's at with Northboundary.

--- Purchase decision ends ---

KEVIN

3:47 It's it's pretty, you know, it's easy to see that there's two entities that have just kind of, you know, engaged, in a relationship and there's still some learning curves to work out.

SUSAN

4:01 Trying to figure out where to put the cash and the new has.

KEVIN

4:03 I take the, yeah. So I mean, a little disappointing in the fact that, you know, it's not there, but I understand that. I mean, obviously, if the other stuff like Progress Billing isn't getting focused on, the focus is definitely gonna be to get Northboundary integrated.

SUSAN

4:24 Yeah.

KEVIN

4:26 I mean, those are kind of where we're at right now. It's funny. And, you know, BuildOps has basically mentioned that. I mean, they're aware of it that there's really not a lot of integration. So, you know, the points they're putting out right now is, you know, hey, we got the reporting you need and we got the Progress billing and, you know, we're kind of at the same space as trade right now is they haven't finalized all of that, which is valid, but I'm sure it's gonna get there.

--- Purchase decision ---

KEVIN

4:55 It's just a matter of time and something that I just gotta kinda way on is okay. You know? And the other part too is I'm not in a huge rush right now because I'm in the busiest time on my ear too. So changing software really is kind of been pushed to the back burner as well. Yeah. So I wonder if it would at this point make sense to just kinda hold off on where we're gonna go till we slow down a bit and then see where you guys are at, you know, let's say a couple of months from now or even, you know, half a year from now to see have things gotten better?

--- Purchase decision ends ---

SUSAN

5:37 I completely agree because, you know, knowing that all these things they're very good about like what we've identified a need. So we're going to really like Chase after it, you know, Progress billing and, you know, obviously the integration are really big priorities. So I think when we get to the place where both of those are really rock and rolling have been up and running for a little while. Everyone's feeling good about it. I would say like if you're not in too much pain, if you will with the current tool that you're having, I would definitely recommend that. I mean, just because, you know, you being a current Northboundary user, you know, the integration is going to one day be super valuable to you. So I would say, yeah, like let's if you can, sit tight, you know, I mean, obviously, I'm biased towards service.

KEVIN

6:30 Okay.

SUSAN

6:31 But... but, you know, trying to be as objective as possible, I would say the ability to have that integration fully flushed out between Northboundary and service trade is going to be, super valuable.

--- Purchase decision ---

SUSAN

6:44 So if you can sit tight with the current solution that you have, you know, maybe don't sign any two year deals with anybody else. You know, I think that might be, the best course of action.

KEVIN

6:58 Yeah. That's where I'm kinda lying with it right now because again, I, you know, the mobile side of things, I think that you guys definitely have a smoother system.

--- Purchase decision ends ---

KEVIN

7:12 It's kind of user friendly. It integrates well. And really if these two hurdles can come together, I mean, it kind of makes sense. And really from the Northboundary perspective that integration is huge. So I think that's what we'll do then.

SUSAN

7:33 Sounds good. And forgive me for being nosy. But did you say that north BuildOps currently does have Progress billing be?

KEVIN

7:43 Yeah, they do. From what I understand. And the last... demonstration we had.

SUSAN

7:52 Gotcha. Okay. No, I was just curious about that. And then when it comes to reporting, is that something that's kind of, you know, with the various dashboards that come kinda comes with, the more basic plans if you will.

KEVIN

8:06 Yeah. See, they're a little different than you and I mean, even the current platform I'm on, they don't really give you an option of a good, better best. It's like this is our program. If you like it, get on board if not, then, you know, they'll make some exceptions. So, I think that's where this reporting side of it just comes like, and, they, they're attacking, see I came from the link or the ABM world, which is kinda where in started back when. And I think what they're really doing is they've really

kinda keyed in, on the reporting side of what, how link has laid it out because one of the biggest factors of being an ABM partner and I used, I spent my previous life there for like 17 years was you can't report your business and you can't measure it. You don't know how well you're doing. So this reporting side of it is kind of ingrained in my brain is, are we making money or not? I mean, we could be busy but it doesn't mean anything or, you know, not turn a profit. So, I think that's where they have really kind of focused in on is this reporting is robust, and a lot of the templates are already done, kind of mocking that same system.

--- *Accounting integrations* ---

KEVIN

9:18 So that's where, my intrigue is really, you know, okay, this is what we need. You guys have got it there.

SUSAN

9:27 Yeah, no, that definitely makes sense. But yeah, like I would say, you know, keep on keeping on and, you know, in terms of reporting, I don't really foresee that moving, you know, with the, you know, the link that sent over, you know, with all those various reports, I'd be very surprised if that came off of enterprise only, of course, anything is possible, but, you, know, that is certainly available.

--- *Purchase decision* ---

SUSAN

9:53 So, yeah, like I say, you know, let's keep in touch and, you know, well, I'll you know, let, you know, as soon as we're in a place where I think this will be more valuable to you.

KEVIN

10:04 Yeah, I think that makes sense.

SUSAN

10:07 Awesome. Well, I hope you have a fantastic summer and you get through, the busy season unscathed and we'll be talking soon.

--- *Purchase decision ends* ---

KEVIN

10:16 Yeah. Okay. Thank you. I appreciate it.

SUSAN

10:19 Thanks. Have a good one.

KEVIN

10:20 You too. Bye bye.

The End