



ServiceTrade Review

McKenna Nelson with Archie Johnstone Plumbing & Heating Ltd
Recorded on 3/15/23 via Zoom, 23 min.

Participants

SERVICETRADE

McKenna Nelson
Account Manager

ARCHIE JOHNSTONE PLUMBING & HEATING LTD

Jordan Medwid
Project Manager

Topics

<i>Pricing</i>	14:16
<i>Pricing</i>	19:58
<i>Next Steps</i>	21:40
<i>Wrap-up</i>	22:13

Transcript

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

JORDAN

0:00 Just give me one second here... awesome. Thank you very much.

MCKENNA

0:06 Yeah, no problem. How's it going?

JORDAN

0:10 Sorry, I was just on another call. Of course, I'm trying to log into this meeting. I get a phone call for student tuitions for one of my.

MCKENNA

0:21 That sounds fun. So thanks for having. No, you're fine. I do have a little bit of limited time. I have another call at the top of the hour, but I know we already talked about some of this stuff, but really just for a quick background, we review our customers about every quarter to internally to see where, you know, what their goals are, what they're looking to do, what their roadblocks are, you know, how happy are they? What are they using? What are they not using really just to review their account as a whole. And so what we're doing now is trying to make that more interactive and make that more of like a team process where we're all on the same page about it. So I have a document that it's a template that I was planning to fill out with you. Some of this. We probably already talked about in your last meeting, but this will just give us a centralized place where we can, you know, keep track of everything regarding your account.

JORDAN

1:27 Perfect. Make.

MCKENNA

1:27 Sure we can collaborate are on the same page. So I know we have limited time. So I'm gonna jump into it already filled in some of the information here. But anything else contact yep you all are fairly new. Your next renewal is in 2025 so luckily, we don't have to worry about that for a while and I know you all purchase time card. How's that going for you?

JORDAN

2:00 To be honest, I find it a little archaic when it comes to how the guys need to fill it out on their phones. So... I was kinda under the impression with like service trade is very intuitive for our guys and very easy to use. But the time card function is

basically, it's almost a website hard to read, not scroll able. It's it looks made for a web browser and a computer rather than on the phone. So I find it a little. It's super clunky is.

MCKENNA

2:39 Okay. Yeah, no, that's good feedback. I know it was, it's designed to be accessed from a computer or a laptop. Yeah, that's not to say that that's the way it will be for forever. I know they're planning a lot of updates to it. I'm not sure if this year they have a lot on their plate that they're working to tackle to make improvements to it. So, I'm not sure if that is going to be, if that's one of the things that they're gonna work on, but I am going to add this to my list.

JORDAN

3:19 Yeah.

MCKENNA

3:21 I mean, it's it is what it is. I know what you mean? You know, I've never tried to use it on a phone but I'm sure it kinda works like Facebook did, when back before there was an actual mobile app, you had to go on the inter end pension Zoom and scroll. Yeah, wasn't a great user experience.

JORDAN

3:38 I guess what you could say is not mobile friendly... a device friendly?

MCKENNA

3:48 All right. All right. So, I'll check on that any, then we'll do an account health review here in a few months since we have a little bit more data. Any support tickets or support issues you're working?

JORDAN

4:04 No, not at the moment.

MCKENNA

4:06 Okay, good.

JORDAN

4:06 I guess there was a ticket and basically in service trade and I don't know if you have a way of looking at it, but if you have a demo account open, but there's a lot of search functions inside service trades for jobs waiting on parts with parts, all that kind of stuff. And when we said, you know, you have all these searchable features. How do we use it? They're like you need partsledger. Well, I don't need partsledger for inventory and everything else. We have our own way to deal with that. But what would be nice is availability to be able to pin down what jobs need parts, what ones are waiting for, parts? There's not an active way to understand the weight list of what customers are waiting for. So that seems to be difficult.

MCKENNA

4:59 You can, you can add that. So, part, yes is really the more robust way to do it. But let me log into another customer's account. Let me log out of that. What you do, I'm just gonna grab a job here is either you or the technicians can do this. But when you add parts labor and items, so to cable tie service line... cost whatever, and then we, you're choosing the source. Sorry, my dog has been losing our mind today and then this is the same thing that the technicians can do too. But if you do parts vendor, you can choose which vendor you are ordering it from, you can upload those into your account, put a po number and then select a status for ordered. Now get ordered, received, whatever the case is estimated delivery date, you know, end of the month. And then that way you can... search the jobs page using that filter.

JORDAN

6:18 That's funny because we asked specifically that and it was all that's a function of partsledger. You can't use that function. So I just want to double check like my go to a service call job.

MCKENNA

6:33 Do you?

JORDAN

6:34 You...

MCKENNA

6:34 Remember who helped you on the support?

JORDAN

6:37 I don't...

MCKENNA

6:39 Okay. I can look it up later. I can go, I can clarify that with them and make sure they know that there there is some functionality in terms of tracking that. But, yeah, you know, robust thing. It'll be, you know, partsledger but.

JORDAN

6:52 Go to parts and I say material pal, service materials, global blog, cost used on source. You would put the reference number. I see reference number only.

MCKENNA

7:09 So it's not in the parts. Where are you a?

JORDAN

7:15 Just went into a job and then said add charts like you did.

MCKENNA

7:22 And...

JORDAN

7:22 Then you go to source. I don't get.

MCKENNA

7:26 You may not maybe because you don't have any vendors in your account yet?

JORDAN

7:30 When I, yeah, when I go to source, it says technician or reference number only.

MCKENNA

7:36 Okay. I believe if you add, if you add parts vendors, that option will show up on there.

JORDAN

7:47 That's good to know because then I can make.

JORDAN

7:58 I have to add a vendor to where?

MCKENNA

8:04 In my account and vendors.

JORDAN

8:12 Which is weird because I do have vendors in.

MCKENNA

8:19 Four parts specifically.

JORDAN

8:21 Just gonna take a look.

JORDAN

8:28 They've been putting in service vendors. So we have to, we have to add part vendors in there. And then we have that option. Okay. That's perfect. I can make that work.

MCKENNA

8:40 It sounds great.

JORDAN

8:42 Every day.

MCKENNA

8:44 I do too. Yeah, it took me a while to figure that out too. If you have that support ticket close by or can locate it easily. If you can forward that to me, that way, I can follow up with the support person and make sure they know that is the thing that can be done.

JORDAN

9:01 Hey, I probably do have that still.

JORDAN

9:15 That came from Alina.

MCKENNA

9:22 All right. While you are looking about, let me share my screen again so we can go ahead and run through this. Okay? So that's one roadblock, any other roadblocks that you're running into?

JORDAN

9:42 I don't well, time card has been one that marks one has been one... and I think that's so far that's it.

MCKENNA

9:55 Okay. Well, yeah, if anything comes up, let me know. And what I'm gonna do is I think I'll add it down here. Yeah. So I'm gonna share this document with you. It'll be a Google doc so we can both edit it and then just, you know, book market, keep it handy. And then if something does come up that you wanna talk about on the next call and sort of roadblocks, you can add that here. And then we'll just check in at the beginning of the meeting to see if there's anything that we've added. What is your most desired feature? Anything that you really wanna see? I know is that time card is that the biggest?

JORDAN

10:30 I'm card and, you know, our own analytics and I know... that is part of another step up on the monitoring side of things. Some of the other, some of the other, some of the other call it. What is this even called dispatch software or what is called? Or what do you guys call yourselves a service management software? They give analytics a lot of them, do it, you know, in the lower tiers as well as the upper tiers. Not so much. But it would be good to see like sales data.

MCKENNA

11:14 That is on the road map. I will tell you that what we have in quick site right now, what our customers can access and some of that advanced reporting, it's not going to

be everything that you can do in quick site, but they're trying to move some of that over to the native service trade app so that more of our customers can access that more advanced reporting. So that is on the road map.

JORDAN

11:35 Yeah, I know BuildOps and service tighten specifically, give the administrators or the managers a different dashboard than what everyone else gets. So there's a lot more analytical data there that... I can extract and use for I don't know, marketing purposes, everything else.

MCKENNA

11:58 Huh.

MCKENNA

12:07 I was just talking with somebody else about BuildOps last night, but yeah, that is something that we're planning to do is to move a lot of that from quick site into the native service trade app. I'm not sure who is spearheading that project. But if you have anything specific like anything in another system you've used that you can send us a screenshot up or any, anything like that you can pass along to me then I can pass it along to the product team as a feature request. And then when they're looking at improvements to make and what the customers want, they can pull that up directly.

JORDAN

12:49 Okay. BuildOps has been phoning us constantly being like, are you sick of service trade yet? Do you want, you know, these features that service trade doesn't do very well? I bet you're having problems with this. And my only response is I'm sure if we signed on with BuildOps, service trade would say the same thing about their system and what their systems lack. So, everyone's got their, you know, their drivers or why they've done things for the most part. I'm really happy with where we're...

MCKENNA

13:28 Good. That is good to hear. We have heard a lot of that recently... of them trying to get, trying to get our customers. And what I will say is we know what service trade is good at. We know what we're made for, we are making improvements all the time.

JORDAN

13:45 Which is great like working with a company that knows their strengths but also recognize their weaknesses and are trying to make that, that's what it's all about.

MCKENNA

13:58 And not everybody will be as honest with you as I am about, you know, but we know if you're looking for a software that's made for projects and larger scale Construction, BuildOps is right now better than we are at that.

--- Pricing ---

MCKENNA

14:16 That's what they are made for. But if you want to get more revenue from the service and recurring service side, then that's what we are good at that's what we are made for.

JORDAN

14:25 Exactly why we partnered with, you know, we do anywhere between 25 and 50,000,000 in Construction projects a year. We built out our own software there and we're more than happy with it. And it costs us zero dollars... that's where we wanna be on our Construction side. Our service department needed something better. I think the service links the customer portal that we're just about to put up asset tracking history management. You guys are doing a great job. And I know there's other guys out there like specifically FieldEdge, I think tries to take a big market out of the H back and the plumbing side of things too. And, you know, they basically have the same thing except you add a picture of the unit. I don't really think that's any value. But for the most part, we're really happy with where we're at.

MCKENNA

15:21 Okay. That's good to hear that's what I hear from other people is from BuildOps is that the implementation can take sometimes a year to like actually get up and running with the software. And, you know, since you're fresh out of implementation, it may take a, I mean it takes time but it doesn't take a year.

--- Pricing ends ---

MCKENNA

15:41 I mean, you're using a software right now, a lot more than a lot of my customers are that have been here for years.

JORDAN

15:48 Yeah. I'm super pushy with my staff. I'm like garbaging is garbage out. So if I said they're like it's so much more complicated than our old SmartService, I said, but we couldn't give our customers what they wanted was simple.

MCKENNA

16:07 Not...

JORDAN

16:07 In a simple trade, we're not in a simple service company. We don't sell a single widget, we are multifaceted multi divisional and hardening with you guys have been really good.

MCKENNA

16:22 Good. That is good to hear. I know we're doing market research.

JORDAN

16:26 We go onto that. The one thing I did have an issue with is this is a us Canada issue you?

MCKENNA

16:36 Tax...

JORDAN

16:37 Tax tax rates. It is ship for Canada.

MCKENNA

16:46 That I'm familiar with. I have a lot of Canadian customers. The last customer I met with today is from Canada too. So I totally get that... there is... an improvement in the works.

MCKENNA

17:05 But I don't have a timeline for you on that... but it is something and that's what I will be very honest with you. I know that is something that we're not strong at, but I will tell you that is something that they are working on.

JORDAN

17:25 And it doesn't have to be that complicated. The way that, you know, service train has made it more complicated than it needs to be for Canada because you guys, and when I say you guys the us, your zip codes are basically boundaries, right? Ours are more areas and within so like Vancouver island. I think there's probably over 100 postal codes if you want to call zip codes. And that's for like little tiny spot areas. So we can be 102 100 plus area codes that I would have to sort through. And they're building new ones every day. So to keep up on that, it would be an absolute logistic nightmare. All I've asked for service trade is can you blanket everybody with the same tax? And then you were like, no, but you have to put in the zip codes. I said get rid of the zip codes. Just put a click of box in. Everyone's at five percent because that's how our feral government works.

MCKENNA

18:31 Yeah. I just looked at the update that my, that our product manager gave to another one of my customers. I can, that I talked about... it looks like those changes are going to happen in second half 2023...

JORDAN

18:54 Okay. If there is a all in company compassing blanket tax that I can put on there, that'd be great.

MCKENNA

19:04 Yeah. I don't know specifically what it's going to look at, but if you have anything specifically that you can send me like not, I mean the screenshots doesn't really make sense. But anything that you can send me that I can forward over to that product manager that's in charge of all of those different projects. All of that is

helpful because I can try to relate to him what you're looking for. But having it in your words that I can forward over is a lot more helpful because we really want that feedback.

JORDAN

19:32 Well, I guess what I can, I'll explain it in the most us way I can, every state has their own here in Canada. Every state would have their own state tax on materials, only our federal government, which I guess the us government would have their own tax on the total amount.

--- Pricing ---

JORDAN

19:58 So we have PST which is our provincial sales tax which is at seven percent and that difference from province to province. And then federally, they want their money too. So they chip a little bit off, which is five percent at the end of every invoice on everything materials and labor. So what we're doing internally right now is our provincial sales tax. We're adding that to our material cost. And then with the final cost, we're having to click other and then adding... our federal tax at five percent on the entire Bill. But what's happening is sometimes the guys in our estimating or quotes department, miss not only the PST add into the material, but also add, forget to add the tax on the GST for the total. The final Bill amount... can be a pretty detrimental hit at five and seven percent.

--- Pricing ends ---

MCKENNA

20:59 Yeah, no, I see what you mean. Yeah, anything that you can send me. I know, I mean... I understand the concept, but anything that I can send directly from the customer and forward over and say, hey, this is another customer like it's another drop in the bucket. Another customer that really needs this.

JORDAN

21:19 Yeah. Basically, if you have any Canadian clients, they're all gonna complain about the same thing.

MCKENNA

21:23 Yeah. I mean, they do... I hear it that's why I've been knocking down the store to try to get, try to get them... to move on that project. So, but it is slated for later this year.

--- Next Steps ---

MCKENNA

21:40 I do have to run to another meeting. I know we had limited time... if you have any like another block like this week where you can schedule another meeting, you can, and we can kinda finish this up.

JORDAN

21:55 Sure.

MCKENNA

21:57 Yeah. I was about to say if you don't have time that's fine. I can show the document with you and you can figure, you know, you can fill things out but it's up to you. I know we've met a couple of times recently, but I think it's worth getting a good game plan if you have, you know, another 15, 20 minutes later this week.

--- *Wrap-up* ---

JORDAN

22:13 I would like to do that.

MCKENNA

22:15 Cool. Sounds great. Well, I will, you can just use the same scheduling link that you use for that one.

JORDAN

22:23 From the last one?

MCKENNA

22:24 Yeah.

JORDAN

22:27 You know what if you actually can, you send me another one? Because what happened is I sent it. I'm I was on autopilot and I sent it to my Gmail account, which I don't look at as personal. So, I didn't send it to my work account. And then I had no idea what was going on because it was updating that.

MCKENNA

22:46 Gotcha. Okay. I'll send you the, I'll send you the link to your work email. Let me add that to my list too. Yep, and then we can finish hashing that out.

JORDAN

22:57 Okay.

MCKENNA

22:58 Cool. Thanks, shorten, and see you later.

JORDAN

22:59 Great. Cheers.

MCKENNA

23:01 Bye.

The End