



# Call with Vertech Services, LLC - Stacie Rountree

Quinton Stallings with Vertech Services, LLC  
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## Participants

### **SERVICETRADE**

Quinton Stallings  
*Territory Manager*

### **VERTECH SERVICES, LLC**

Stacie Rountree  
*HR manager*

# Topics

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# Transcript

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

QUINTON

0:01 Hi, I'm looking to speak with Stacy please?

STACIE

0:05 Can I ask who's calling?

QUINTON

0:07 Yeah, it's quit installing from service strict.

STACIE

0:29 This is think.

QUINTON

0:30 Hey, Casey put in some surgery that can share time. Perfect... perfect. Well, the reason for my call, I saw your request come in for another demo of service trade and I wanted to kinda touch base and get an idea of where you guys are at as far as replacing Wintac and what's kind of changed since the last time we spoke.

STACIE

0:34 Yes.

--- Call Setup ---

STACIE

0:51 Laura, he talked to you?

QUINTON

0:54 We spoke, let's see. Yeah.

STACIE

0:54 Let's see. I did... I did. Okay. Sorry, I wasn't I'm remembering talking to you and I just talked to and someone at FieldEdge and they were recommended and y'all, as one of their top to.

QUINTON

1:09 Okay.

QUINTON

1:13 Awesome.

STACIE

1:14 Right now, I'm just right now, I'm just going through trying to get all of, you know, the most to multiple different companies to see which ones will work best for us. So, I did talk to you. I'm so sorry.

QUINTON

1:29 Worries. I'm glad you call back.

STACIE

1:30 I've talked to so many. I don't know. Let's see. Okay... okay?

QUINTON

1:38 Yeah. I think the last time that we... we spoke, you'd still need to talk with Stacy and Travis, I'm kind have about service trade. Did you ever speak with them? Is that kind of what's... what's kind of prompting you too? Okay?

STACIE

1:52 Yeah. We have, yeah, we've talked and Sage, she just wants me to get demos from a few different companies to see which ones will, you know, do the best of what we need.

--- Call Setup ends ---

QUINTON

2:06 Right. Right. Okay. And what were some of those main things that... that you guys are looking for?

STACIE

2:13 One of them, like what we're finding on a lot of our demos is that they can't make the invoices and how we need them to be made? Because on one of our main larger customers, they want our invoices to show cost markup and price, and so far, and no one's been able to do that. And the software that we have right now does that?

QUINTON

2:24 Yeah.

QUINTON

2:41 Gotcha. You saw on the invoice, you want to be able to show the markup and then also the price for what you guys are charging them. Got it. Okay?

STACIE

2:49 Correct.

QUINTON

2:52 I believe we can do that, but I'll... I'll double check as well.

STACIE

2:53 I'm reading my service.

STACIE

2:57 Okay. And let's see go with someone in service trade customer.

STACIE

3:03 I'm trying to read my notes from.

STACIE

3:06 Service trade. And so the technician can attach their own paperwork, their own pictures.

STACIE

3:15 That's what you're on your, the demo we had with you. It says that you can't make the invoices look the way we need them to look.

QUINTON

3:24 Gotcha. I don't know if we ever took what spoke with our team about like if we can make those the way that you guys want them to look. So I can definitely follow up with that. But if that was a case where we couldn't make those look the way you guys would want to, would that be a deal breaker?

STACIE

3:44 I'm gonna have to get with service channel on at that... that has always been their requirements. So I can double check and see if maybe that has changed.

QUINTON

3:50 Okay.

QUINTON

3:56 Okay.

STACIE

3:59 And then get back with you and on that, but we didn't have a actual demo. Did we leave this box?

QUINTON

4:05 Yeah, we went through, we know we went through a demo with you and wrong, one of the things that you guys also mentioned that could possibly be a deal breaker was the fact that we, we're cloud base. Is that something you guys are... are now okay? Was okay. So cloud based and no longer an issue, got it.

STACIE

4:19 No, that's fine. Yeah.

STACIE

4:25 Yeah, that's fine. Now, I did get that clarified with safety day that she was the one that was always, you know, very server. She wanted everything on the server.

QUINTON

4:37 Right, right, right.

STACIE

4:40 But one of the reasons why I asked you was telling me is because there were hacked, you know, we're liable for all of that, and they all have lab realty insurance.

QUINTON

4:55 Liability insurance like if your data, which is somehow get hacked.

STACIE

4:56 Yeah, that... yeah.

QUINTON

5:00 I'm assuming. So we're... we're hosted in backed up by the Amazon web services, they're cloud based system. So, everything as far as like if they were to, sorry, can you still hear me?

STACIE

5:10 You're cutting out and I...

STACIE

5:13 I can't hear you right now, but I didn't hear anything that you just said.

QUINTON

5:16 Sorry about that. So we're... we're backed up and hosted by the Amazon web services, their cloud system. So as far as they... they protect your data, if anything was to happen to your data, which it's... it's never happened before, they would be responsible for it. So I can find out for you, like what type of insurance or liability that we have, but I can assure you that it's... it's kept safe.

STACIE

5:18 That's okay.

--- Pricing ---

STACIE

5:37 Right.

STACIE

5:43 Okay. And then I was looking at the office was unlimited users. And then there's a one time setup fee, what's the one time setup fee?

QUINTON

5:59 It's for getting your account set up all of your information from your current system imported into service. Great. How much is it? It's off the top of my head. Let me see. Hold on.

STACIE

6:04 No, I don't know how much of it.

QUINTON

6:17 So, account setup for nine technicians would be 2,700.

QUINTON

6:24 And that would be a one time fee.

STACIE

6:29 Okay. And then I have on here 11,200 for the first year, and then 8,500 each year after that, but that's based on non technicians, right? Okay. So, how much is it per technician, because obviously going to have more than nine?

QUINTON

6:41 You got it. Yup.

QUINTON

6:48 So, if we charge 79 dollars per technician per month build on an annual basis. So, if you take 79 and multiply that by 12 months, that would be the cost of one technician each year.

STACIE

7:04 So, it's 79 dollars per month per tech basically.

QUINTON

7:08 Yup. Yup. And if you guys have to like add more tags as you guys, you know, grow, we simply pro rate that you guys can add those into the system at your own at your own time.

STACIE

7:20 Okay.

QUINTON

7:21 Yep.

STACIE

7:22 Okay.

QUINTON

7:24 Well, one question I did want to ask though is when it comes to the invoices, you said that your current system is able to do it? How are you guys doing that now? In your current system wins? And Wintac has that capability of... of showing that markup rule.

STACIE

7:34 We have Wintac.

STACIE

7:41 Yes.

QUINTON

7:41 Okay. Got it.

STACIE

7:44 And then I had another question. All of our customers are different markups plus different labor rates. Does the system allow you to do that to put in different labor rate?

QUINTON

7:45 Yeah.

QUINTON

7:50 Yup.

QUINTON

7:58 Yes. So, like you're talking about like for certain customers, you have different mark up rules for like pricing and labor and stuff like that. Yeah, we 100 percent have that, that's actually though a premium feature. So that would be something that



what we quoted you for was for the select package, but we can definitely talk about pricing and things like that.

STACIE

8:03 Yes.

QUINTON

8:20 On the demo?

STACIE

8:24 Okay. Package only. So we would not want the select package.

QUINTON

8:33 Right. If you guys need, if you guys need contract pricing, you guys would definitely need the premium package.

STACIE

8:39 And what is the premium package cost?

QUINTON

8:43 It's 119 per technician per month build annually. So, for nine tex, see.

STACIE

8:56 And the offices unlimited?

QUINTON

8:59 Correct offices unlimited.

QUINTON

9:06 My calculator only lets me do it for 10. So, for around nine technicians, you'd be looking at like around, I'd say like 17,000 your first year around and then each year after that, around 14,000 or so for your annual subscription.

STACIE

9:23 Right. Because of the one time setup.

QUINTON

9:27 Yup. You got it.

STACIE

9:29 And how much is the setup fee for the premium package?

QUINTON

9:33 It would still be the 2,700.

STACIE

9:36 Okay. And.

STACIE

9:42 Okay. I was gonna ask something else. I don't remember.

STACIE

9:49 So, I'm sorry, tell me again, did we did do a demo? But we just didn't do a lot into the demo because of the questions.

QUINTON

9:56 So, we did a full demo. And then the... the next step was for you to have that conversation with Stacy and Travis. I think that either you guys just never had that conversation or maybe it sounds like since on the demo, we said that we couldn't do the invoicing markup rules. Maybe that's why we never had another conversation, but what we could do is go ahead and schedule a meeting to kind of walk you through and Stacey and Travis again through service trade. And I can also find out before that meeting, how we can accommodate your needs for invoicing?

STACIE

10:33 Yeah, they won't do a demo.

QUINTON

10:35 They won't, do a demo, gotcha.

STACIE

10:37 No, not until we say 100 percent. This is the one that we all agree upon because they don't come to the office. And so they, yeah, they just don't... they want us to choose the demo. And then when we choose it, they'll come in and make the final choice between them.

QUINTON

10:45 That makes sense.

--- Pricing ends ---

QUINTON

11:00 What else have you guys looked at?

STACIE

11:03 God, we've looked at a lot of them. We looked at house pro so far, which was a no for us. We don't know. I get it all. I just got off. And with FieldEdge FieldEdge is who's is taken over one tag, which is our current software. And then we've looked at BuildOps.

QUINTON

11:09 Sure.

QUINTON

11:19 Right, right.

QUINTON

11:25 Build ups, okay? And none of those were able to do the invoicing.

STACIE

11:31 Yes. Well, so that's could not BuildOps, yes, but BuildOps, we're having a problem with reports, right? We can't run our or any of those kinds of reports and build up system and our bank requires those reports monthly.

QUINTON

11:50 So, they are for just... all the... all the accounts that you're bringing in all the invoices that you, Brandon gotcha.

STACIE

11:57 Yeah. Do y'all, do that?

QUINTON

12:01 It's yeah, it's possible. We're not really a accounting like platform. We integrate with accounting platforms, but we don't do any type of like our or ap, anything like that that's all would be within your accounting system.

STACIE

12:15 So, it would be like for Quickbooks?

QUINTON

12:17 Correct. Yep.

STACIE

12:20 My God, and our bank doesn't take that.

QUINTON

12:24 Interesting.

STACIE

12:26 I mean, they will... they will take the Quickbooks form, but they would rather it be out of the software that we're using.

STACIE

12:36 Difficult, like, I don't understand.

QUINTON

12:41 Yeah, I mean, it comes down and just see there's a lot of like platforms that claim to do everything well, but they end up not doing everything well. So, service trade, we're specifically geared for service management solutions and streamlining those operations. So we try to do everything really well on the service side and then pass that information onto accounting, which is what they're good at.

STACIE

13:04 Right. But like, okay. So, does your system and say we need to run a whip report like all calls that we have open, it, does it allow you to do that?

QUINTON

13:16 So all like open service calls? Yeah, you can do that.

STACIE

13:19 Well, I, anything that has not been invoiced?

QUINTON

13:24 Yes. Yeah, you can do that.

STACIE

13:27 Okay. So, strange.

QUINTON

13:32 Yeah, but we do integrate with Quickbooks. So like getting that information pushed over is literally just a click of a button.

STACIE

13:38 Right, right. But I don't work with Quickbooks. And I'm the one that's responsible for all of those reports.

QUINTON

13:47 Gotcha. Gotcha. Okay.

STACIE

13:49 So that's why we're still struggling to get.

STACIE

13:55 To get a company that can, which is weird like every company that I've talked to, not do that now when the company that we have right now does it?

QUINTON

14:08 And, and that was a problem.

STACIE

14:08 To, and the company that we have right now is supposedly the one that's outdated, but it does everything I need and that the new companies don't cleared.

QUINTON

14:19 Interesting. Interesting. Well, how about this? Stacey, since it's been so long since you've seen a demo.

--- Wrap-up ---

QUINTON

14:25 Why don't we schedule some time maybe later this week or next week, I'm kinda walk you through the platform again, I can maybe have some clear answers on the invoicing side of things and then we can see if this would be a good fit.

STACIE

14:38 Okay. Yeah. Let's do that again next week though. Okay. Tomorrow's already Friday?

QUINTON

14:40 Okay.

QUINTON

14:45 You're right? You're right? The short week is... is got me. I was in Florida for a hockey tournament and I've got back on Tuesday. So my week next week's a little... a little bit head but let's see. So next week and you guys, I'm sorry, you guys are Central Time. Okay? How does?

STACIE

14:52 Awesome.

STACIE

15:03 Yes.

QUINTON

15:09 That on here?

STACIE

15:15 Any day is good for me next week except for Monday and Friday.

QUINTON

15:19 Okay.

QUINTON

15:21 How about Tuesday? How about Tuesday? Yeah, Tuesday at two 30?

STACIE

15:21 Those Monday and Fridays are my busiest days, Tuesday. Fine.

STACIE

15:29 Well, I leave at three.

QUINTON

15:31 Okay. How about then? Two o'clock...

STACIE

15:34 So, yeah, I mean, that's fine. If you think we can do it in an hour. Do you have any morning mornings are better above? Has my service manager, Justin likes to be on them? And he... he here on the mornings?

STACIE

15:57 Are you there? Okay?

QUINTON

15:57 Yep. Sorry, I'm just looking through the calendar. I can do, how about 11 AM on Tuesday?

STACIE

16:03 11? Okay.

QUINTON

16:05 Earliest I can do is a seven AM on Tuesday?

QUINTON

16:13 Are you still there?

QUINTON

16:18 Stacey, are you still there?

STACIE

16:20 I am now, I couldn't hear you.

QUINTON

16:21 Okay. Sorry... sorry, I'm the earliest I can do is a seven am and then the next one I have is a 11 AM.

STACIE

16:28 Let's say seven then I'm here seven, but he's not.

QUINTON

16:30 Seven. Okay. Seven AM. It is. I'll go ahead and shoot that invite over 11. Sorry, I don't know why I'm breaking up so much.

STACIE

16:35 No 11.

QUINTON

16:42 Alright, perfect. I'll go ahead and send that over to you Stacey.

STACIE

16:45 Perfect. Thank you so much, Quinton.

QUINTON

16:47 Yeah, I think we'll talk soon. Alright. Bye.

STACIE

16:49 Okay. Bye bye.

*The End*