



Call with Western Mechanical Contractors, Inc. - Karen Noel

Sarah Bartkus with Western Mechanical Contractors, Inc. (WA)
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Participants

SERVICETRADE

Sarah Bartkus
Account Manager

WESTERN MECHANICAL CONTRACTORS, INC. (WA)

Karen Noel
Chief Financial Officer

Topics

<i>Pricing</i>	9:52
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Transcript

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

KAREN

0:00 Chat with western?

SARAH

0:01 Hey, JHA. This is Sarah calling you back. Sorry about that. Having issues with my phone for a second there. Okay. All right. Well, nice to meet you. I am Sarah with service trade, and I know that you had set up a time for us to speak here. So I'm gonna go ahead and let you kind of explain a little bit about, you know, who you are within the company and what kind of interest you in service trade.

KAREN

0:05 That's okay, sir?

KAREN

0:28 Okay. I'm the service sales manager here at western, we are currently looking at BuildOps to be our service provider for our service intake.

SARAH

0:40 Hum.

KAREN

0:46 But we're trying to, they're not quite there with the connectivity we need for Foundation and we're wondering if you're have a better?

KAREN

1:00 Way of connecting with Foundation where we can get all the data that we want, input it into the system.

SARAH

1:07 Okay. Is, do you happen to know exactly what it is that they're not able to do?

KAREN

1:12 Well, what we're trying to do is that.

KAREN

1:16 We're trying to do everything from BuildOps or from any software platform that we want to be able to take our vendors, all of our vendor information. So, let's say that we have a certificate of insurance. We need to make sure that that's updated, they're W nines, whatever's there for that vendor gets transferred. All that information gets transferred from the...

SARAH

1:17 I...

KAREN

1:44 From the software in the Foundation. So dates.

SARAH

1:50 Okay. So you guys are trying to essentially just kind of transport all of your current information into your new software. Is that what you're saying?

KAREN

1:51 Let's see.

KAREN

2:00 No. What we're trying to do is the new software, the software that we're we'd be using. So, currently, what we'd end up doing is we would take everything we have in the Foundation right now and then import it into, the service software from there. What we want to be able to do is?

SARAH

2:10 Okay.

KAREN

2:19 Take, what? If we build a new vendor? We bring that vendor in and that vendor, we would need to know their Coi information.

KAREN

2:33 The, what else should, we want in there is a second here. Let me go ahead and pull up the information real quick.

KAREN

2:58 Yeah.

SARAH

2:59 All right.

KAREN

3:02 A lot of stuff going back and forth with them. So, I'm trying to find the list that we actually gave them.

SARAH

3:10 Sure. That's okay. So you guys essentially, we're looking at BuildOps as an option for a new field service management software. And now, you're not sure if they're the ones you wanna quite go with because of this, some kind of connection issue. Is that what I'm hearing? Okay?

KAREN

3:17 Correct.

KAREN

3:24 Yeah.

KAREN

3:26 Well, yeah, it's where we're trying to, we wanna be able to whatever we currently have in Foundation. We wanna be able to have that option of what we're doing with our new service software platform that we can import that into our, we're not doing any billings through Foundation. Everything would be done through the new.

KAREN

3:50 Service software that we get, but we have to be able to have anything that we put into the service software to be able to be exported back into Foundation to, for maintaining our books.

SARAH

3:52 I know.

SARAH

4:06 Okay.

KAREN

4:07 So, we're not wanting to use, the service software for the book side of the world for keeping track of our.

KAREN

4:17 Let's see here.

KAREN

4:20 What am I thinking of? So.

KAREN

4:25 I'm trying to think here what Karen was doing with this. So it's basically a dual system at that point. If we're invoicing out of...

KAREN

4:36 Out of the service software that we have, that information goes into Foundation for keeping track of that. So we can have one, one place for record keeping.

SARAH

4:37 Sure.

SARAH

4:47 Okay. Well, we do have a integration and partnership with Foundation. So as far as exactly how you guys want that to look and how exactly that would work, would be definitely something that an it M, would most likely have to talk to you about. But aside from that, would, is there anything that you guys are specifically looking for in a service software?

KAREN

4:55 Huh.

KAREN

5:18 Well, that's the biggest part right now, if you guys can do that, where it can be an automated type system where we don't have to worry about once we input it into the service software that it can be pulled from our database and pulled from that database and being able to put into Foundation without us having to manually do it. That would be nice. But right now, with the, with BuildOps, we have to manually take, that information on a daily basis and import it back into Foundation.

SARAH

5:19 Other than other than the integration part.

SARAH

5:36 Yeah.

SARAH

5:45 Hum.

SARAH

5:57 Okay. Yeah. I can understand that would be a lot of very time consuming. Well, I would love to get you set up with an appointment with an it M, but I do need to just kinda ask you a few questions just to see if you guys would be a good fit for us just because we, you know, we like to kind of what's the word I'm looking for kind of.

KAREN

6:01 Okay.

SARAH

6:18 I don't know why it's been a long day already. But anyway, so basically just kinda screen you a little bit just to make sure you'd be a good fit. And then if you are, then I will go ahead and set you up with an appointment. Does that sound? Okay, great.

KAREN

6:28 Okay. No problem. So at least I'm not the only one who's having problems with words today that's cool. It's a Friday thing?

SARAH

6:34 Yeah, good. Yeah, it's a Friday thing. It is a Friday thing for sure. And it has been a long week. So let's start here really quick as far as yep, question number one, how many technicians do you have? And real quick before you answer that, is, do you have, are you looking for just the service side of the company or do you guys have an install team? What does that look like?

KAREN

6:46 Question number one?

KAREN

7:03 So, what we're trying to we're using we'd like to use BuildOps for, or your software is on the service side to be able to have the technicians being dispatched through it, maintaining a.

KAREN

7:18 What am I going here with the.

KAREN

7:21 Maintenance program? So, if we have quarterly maintenance, semi annual maintenances, we want to be able to have that pop up in there in the system automatically, not something that we have to actually find. We have five technicians that do that. Then we have a... we call a small projects group. So they would be the ones that would be inputting their data on a daily basis, they would be keeping track of the Progress of, the job.

SARAH

7:32 Huh.

SARAH

7:41 Huh.

KAREN

7:53 And we're also wanting to keep, and then we have from that group, then we have our major projects that we're also. And so we have about 30 people that we have out there. So we're also wanting to keep track of time sheets through the system as well.

KAREN

8:09 That can be imported in the Foundation.

SARAH

8:12 Okay. And things like reporting would be important for you?

KAREN

8:17 Yes.

KAREN

8:19 So we...

KAREN

8:22 So, the guys would be putting in their time, they would be putting in the job site, what they've done, they'd be inputting pictures of any issues that they find on site.

KAREN

8:34 What else am I thinking of safety concerns?

SARAH

8:38 Okay. Safety concerns. Do you guys do like inspections with your preventive maintenance or anything like that or?

KAREN

8:46 Yes, we do that while through our service department, yes.

SARAH

8:50 Okay. And then I wanna kind of go back here backwards, just a little bit. So just wanna make sure I've got this in here that's okay. So, we've got five service technicians that do like the preventative maintenance and service, and things like that. And then you said the small projects group, how many are in the small projects group?

KAREN

8:54 That's okay. I jumped quite a bit.

KAREN

9:04 Okay.

KAREN

9:09 Four currently.

SARAH

9:13 Okay. So we have, and those are separate from the service technicians you're speaking about, correct?

KAREN

9:19 That's well, they're kind of intermingled, but, yeah, they go doing, I can have my.

SARAH

9:22 Okay.

KAREN

9:25 Small projects guys go out there and help my service and vice versa if need be. Yeah.

SARAH

9:30 Okay. Yeah. They're cross trained. Okay. That's fine. I just wanted to see as far as how many. So, we have nine in total that do the service and small projects group. And then, so major projects, is that more of like general contracting or what is that? Okay?

KAREN

9:40 Okay.

KAREN

9:47 Yes.

--- Pricing ---

SARAH

9:52 And those smaller projects, how like what is the size? Well, not necessarily what's the size would you say? Like how many months would it take to, on average take to finish one of these projects?

KAREN

10:04 So that could be three to six months?

SARAH

10:09 Three to six months? Okay?

SARAH

10:16 And then, so this, basically, this is mostly the part of, the company you guys are looking for a software for? Is the service and small projects? Is that correct? You want the whole thing?

KAREN

10:25 No, the whole thing we wanna be able to do.

--- Pricing ends ---

KAREN

10:27 Yeah, we wanna go ahead and be able to do all of our reporting for the major projects, small projects. So, we have to, on a daily basis, we have to have our create our logs on what we've done during the day. Any issues that we found during the day, have pictures of set issues. We're also doing, want time sheets, they're being able or time being tracked through the software as well. So that's what build ups right now? Are we're using rake in for, our daily reporting and our... in our time sheets, and we can integrate that into Foundation through that company.

SARAH

10:44 I huh.

SARAH

11:10 Okay. You said rain is the name? Is that rake? Okay. That I wanna make sure I was spelling that correctly? And as far as the major projects can you tell me a little bit more about like how long those usually typically take? Excuse me?

KAREN

11:11 Yeah, or a Ken.

KAREN

11:23 That's usually one to two years.

SARAH

11:33 Okay. So, I do like to let people know, generally, I'm not sure. I know for sure that the service and small projects is gonna work, very well with our software. I'm not sure exactly how or if the general contracting like exactly what, depending on what you guys are really needing within the software. I'm not 100 percent sure if that will specifically be a good fit, but the im can definitely... they can definitely get into more details about that and especially with you that kind of a little bit more out of my realm, but I do like to kind of just let you notice to be prepared for some questioning around that.

KAREN

11:46 Awesome.

KAREN

12:19 Okay.

SARAH

12:20 So, let's see here and.

SARAH

12:24 And then what type of equipment exactly are you guys working with? It looks like you guys have a wide variety of things here on your website. It says it just says commercial industrial healthcare. What is it like just hvac, it says something about plumbing, just kind of figuring out exactly what type of stuff you guys are working with exactly.

KAREN

12:28 What do you mean by equipment?

KAREN

12:42 We don't actually have a website yet.

SARAH

12:46 Well, I guess maybe I am on a different website then it says western mechanical.

KAREN

12:47 We have.

KAREN

12:51 Yeah. No, there's another western mechanical back east where, so that was interesting, that would be back east, there's a western mechanical. But yeah, when the powers that be here decided to pick a name, they said western mechanical. Okay. Well, here, we are western mechanical incorporated, but there's already one around the country. So, yeah.

SARAH

13:10 No. Okay. Well, yeah, because I am literally looking at, it says let's mechanical inc. So, okay, that's super funny. Well, I am so sorry for the confusion there.

KAREN

13:18 Yeah. So we are, we have, yeah, we do have a Google presence right now is about all we have, but we're more of a word of mouth company we pride in ourselves and our, what we do and we get plenty of work without even have to be on the web.

SARAH

13:36 Okay. Well, no worries. So, did you guys have any plans on creating any kind of website at all or a landing page by chance?

KAREN

13:38 Yeah.

KAREN

13:43 Yeah, we, yeah, we will. Yeah, we will be.

SARAH

13:47 Okay. And have you guys been around?

KAREN

13:48 It's in the works for early next year.

SARAH

13:51 Okay. Perfect. Okay. All right. Cool. And then...

SARAH

13:55 Let's see here. What was I gonna say? Yeah, so, well, then, why don't you go ahead and tell me exactly what type of equipment you guys are servicing and the PM agreements things like that.

KAREN

13:57 Yeah.

KAREN

14:04 We have boilers, we service boilers back, flows... waste lines.

KAREN

14:12 So, we get and camera.

KAREN

14:16 And then we...

KAREN

14:18 We install boilers, we install water heaters at killers cooling towers?

KAREN

14:30 Commercial.

KAREN

14:35 Cooking equipment, dishwashers, for other companies?

SARAH

14:43 Okay. And this, is this all commercial that you're doing? Okay, good?

KAREN

14:50 Yes, there's it's either.

KAREN

14:54 High end residential.

KAREN

14:57 Or commercial.

SARAH

14:59 Okay. And what's the percentage of your high end residential versus commercial?

KAREN

15:04 Two percent.

SARAH

15:06 Okay.

SARAH

15:22 Okay.

SARAH

15:24 And you guys are hoping to do like the billing from your?

SARAH

15:31 From the field service management software, do you guys try to Bill from the field? Or do you guys usually send the information back for the office to go over? And then?

KAREN

15:39 No, it's...

KAREN

15:44 The office has to approve it before it even goes out. Yeah, we don't do an auto Bill from the field.

SARAH

15:50 Okay.

KAREN

15:53 We wanna make sure what's going to our customers is accurate and concise...

SARAH

15:59 Okay.

SARAH

16:23 And you were talking about the pictures and notes and things like that. Is that a requirement that you have from some of your contracts?

KAREN

16:32 It's a, it's a requirement that we want. So we have a backup of any issues on the site?

SARAH

16:38 Okay.

KAREN

16:39 So, if there's any issues with liquidated damages to where we're saying, hey, you held us up and, or there was damages to a room and we're gonna, no, that wasn't like that when we get done?

SARAH

16:54 Huh.

KAREN

16:55 We can show, look, this is the way we left?

SARAH

16:59 Yeah, no, it's very smart. It's a great feature to have absolutely.

KAREN

17:02 Then also videos we want to be able to put those on the system as well?

SARAH

17:07 Okay.

SARAH

17:12 Perfect. And then you're speaking about the PM agreement with those, what would you say the percentage of your service is preventative maintenance?

KAREN

17:26 Right now?

KAREN

17:29 Contracts are set up probably 10 percent, but we're trying to get that go up, in numbers here. Now that I've come on board?

SARAH

17:38 Sure.

SARAH

17:46 Always good to know how much money you have planned, you can plan things out, when you have the preventive maintenance, you know? Okay, so.

KAREN

17:53 Yeah, it's just, we have, we don't have the contracts actually out there with the customers. Like I said, we're a word of mouth company and they just when they want us to come out and do the work and on preventive maintenance on their equipment since it's in their system anyhow to their preventative maintenance program, they just call us up, hey, come out and take up our system for us. Okay? We'll be out there and time and day.

SARAH

18:01 Okay.

SARAH

18:09 Right.

SARAH

18:19 Okay. Well, then this way, yeah, you're gonna have everything already set up for you and your system or, and if you choose us in our system, you know, for you guys. And if there's also, we also do have a customer portal. So, if for whatever reason, they need you to come out, you know, for a reactive service, they can put in a note that way like or a ticket for you guys. Yeah, they can just log right on and...

KAREN

18:25 Yeah.

KAREN

18:38 Huh.

KAREN

18:42 Good. Okay.

SARAH

18:47 There's a way for them to choose their location and everything and be able to give you some notes on what's going on. So you guys can set up an appointment with them.

KAREN

18:55 Good.

SARAH

18:59 Here and just kinda going over my notes, making sure I got everything here... and I had let's see.

KAREN

19:07 No worries.

SARAH

19:12 I have Karen Nowell, information in here. So let me go ahead and add your information as well. So I can.

KAREN

19:18 Hum, yeah, she is a CFO.

SARAH

19:22 Okay.

SARAH

19:25 And your name is Chad Nowell?

KAREN

19:27 Yes.

SARAH

19:28 Okay.

--- *Small Talk* ---

SARAH

19:48 Is there any relation?

KAREN

19:50 Yes, she's my significant other, AKA wife.

SARAH

19:53 Okay. Yeah, I didn't wanna, I didn't wanna assume but.

KAREN

19:56 That's when she wants to claim me. Yeah, yeah, that's when she wants to claim.

SARAH

20:02 Yeah.

SARAH

20:06 When you're lucky.

KAREN

20:08 Yes. Well, I'm lucky.

SARAH

20:10 You...

SARAH

20:19 Okay. But Chad in at western me, do us.

KAREN

20:24 That's correct?

SARAH

20:50 Just adding you in here as a contact.

SARAH

21:00 So, I just wanna make sure that I have a little bit more information from you just because we did just talk about how I think we might have some.

SARAH

21:12 Information here that might be a little bit different since the...

SARAH

21:17 That is not your website. So I wanna make sure I have the right info here for you. So I'm gonna get rid of this website and the billing ad or sorry?

KAREN

21:27 Just...

KAREN

21:29 So if you want to, you can go in and grab.

KAREN

21:34 Let's see here. If you go western mechanical contractors, Kent, Washington, it should pull up the Google page for that...

SARAH

21:44 Okay. Great.

SARAH

22:10 Sorry, hold on one second.

KAREN

22:13 No.

SARAH

22:15 So, you said you're in, Kent, Washington? Okay, perfect. And do you know what the zip code is for that?

KAREN

22:18 Huh... huh?

KAREN

22:25 Nine eight, zero, three two.

SARAH

22:31 Perfect.

SARAH

22:41 We are in Washington. So, we are west coasters.

KAREN

22:46 Yes.

SARAH

22:47 I'm from Oregon originally, I was just over there.

KAREN

22:51 What took you back east?

SARAH

22:54 What was that?

KAREN

22:56 And what took you back east?

SARAH

22:58 So, I've been living out here for quite some time now.

SARAH

23:03 I moved out here with a significant other at the time and, you know, things didn't work out for us, but they're working out in other ways. And so, I love the weather out here and I don't know, I've just, I've enjoyed it. So, so now I just go back and visit every now and then I can't handle the rain. It's too much for me.

KAREN

23:08 Huh.

KAREN

23:14 Good.

KAREN

23:19 No, good.

KAREN

23:24 Yes.

SARAH

23:26 You know what I'm talking about?

--- Next Steps ---

SARAH

23:29 Yeah, I can't do it.

KAREN

23:32 Is nice though. When you're going hiking, nobody else wants to hike in when it's drizzling and you get that nice, crisp air. And so, I do like that part of it?

SARAH

23:38 Hum...

SARAH

23:44 Yeah.

KAREN

23:46 I like.

SARAH

23:48 Nice cold air. Okay. What's going on here?

SARAH

24:01 You know, it's really funny. Is that at the other western mechanical? There, is a CO, at western me. Dot com.

KAREN

24:07 Hum.

SARAH

24:13 Is there another chat? No, I'm super confused.

KAREN

24:13 Really?

KAREN

24:16 I'm wondering.

SARAH

24:19 So, looking up all the information here, and I'm like that would explain why everything's so mixed up and confusing? That's weird.

SARAH

24:28 All right. Well, let's see here. I'm just getting your information. We're gonna get the schedule up.

SARAH

24:41 Right. So.

SARAH

24:44 We are going to get you on.

SARAH

24:50 That's gracious. So, we've got five six, seven, eight nine.

SARAH

24:54 So...

SARAH

25:00 Mechanical...

SARAH

25:04 Gotcha. With Susan. It looks like.

SARAH

25:08 And are you more of a morning person or afternoon person kind of what is your schedule usually look like when you have, so it's best. Okay.

KAREN

25:14 Morning morning is best.

KAREN

25:18 Yeah. Then I'm in the office here.

KAREN

25:22 And except for, Wednesdays, I'm trying to go out and meet with clients?

SARAH

25:28 Okay. And when you say in the morning, would you say like eight am morning time or a little later?

KAREN

25:36 Yeah. Eight eight o'clock no, eight o'clock is fine. Sounds, it's not at seven since they've usually all hell breaks loose for seeing in the morning and trying to take care of things.

SARAH

25:40 Okay.

SARAH

25:48 Sure. So, I do have an eight am on Monday. Would that work this coming Monday?

KAREN

25:54 Let me see here.

KAREN

26:01 It's open.

SARAH

26:02 Okay. So I do have, so I have your e-mail as Chad in western cus, did you want me to add your wife on there as well or did you wanna just kinda start off with the first conversation with just you?

--- Next Steps ends ---

KAREN

26:17 Yeah, that's just keep it with me for right now. I can grab the information. Yeah, and I can send you a list of items that we're looking at having tied in. Yeah.

SARAH

26:19 Okay. And if you wanna add anyone else on there, yeah, if you wanna add anyone at any time, you can do that as well. So, I have you at.

SARAH

26:30 That would be, yeah, that would be absolutely great. So, Susan would love that for sure. So, I have you at eight a. M. Pacific Time and I gonna send you over an e-mail it's gonna give you about 16 minutes. We'd like to give an hour. Sometimes it last that long. Sometimes it doesn't it just kinda depends on how many questions we may have.

KAREN

26:45 Huh.

KAREN

26:48 Huh.

SARAH

26:52 Just wanna... go over.

SARAH

26:58 So, we are looking for.

SARAH

27:03 Service service software installs, hopefully, we can help with some of the other parts of your business or at least be able to offer some kind of suggestions, if, at the very least.

KAREN

27:15 Yeah.

KAREN

27:17 Yeah, we're yeah, we're wanting a one stop shop on this. We're we're not wanting the piecemeal, the software programs that's the reason why I was looking at the BuildOps because they could do.

SARAH

27:27 Yeah.

KAREN

27:28 The new Construction, we can keep track of things through that, and then we could do all of our.

KAREN

27:37 Time cards. All of our time can then be grabbed and then input it in the Foundation.

KAREN

27:45 And then we could do all of our service side.

SARAH

27:50 Yeah. I do know that sometimes finding a one stop shop depending on exactly what your needs are within the software, sometimes can be difficult to do just from my experience. But again, the item will be able to Susan. Now that I know who it is, Susan will be able to go over that in a little bit more detail on, you know, if we can do it and how that would look like and et cetera. She, she knows a lot about the other platforms as well, like way more about the other. I know about our platform. She knows about all the other platforms. So she'll be able to tell you more about how things work with that. Okay, great. That's a little half my pay grade.

KAREN

28:01 Hum.

KAREN

28:13 Okay.

KAREN

28:18 Huh.

KAREN

28:29 So, that...

SARAH

28:30 Okay. All right. And then we also do have another thing that also is really cool. And if you're planning on growing your preventive maintenance plans, do you guys have a sales team or I know you use your sales manager, but do you have like any like actual salesmen out there that are calling companies and trying to get business?

KAREN

28:52 No, we're not doing that at this time. We're more, no, we believe more in doing, the hard.

SARAH

28:55 Not doing that at this time. Not sure.

KAREN

29:03 Let's here. Not hard. So what do they call that? It's not hard sales. My mind just went blank. Now walk around and go and see a meeting with clients, new clients that way.

SARAH

29:09 Okay.

SARAH

29:12 Okay. Yeah. But so, you do that yourself? Is that okay? Yeah.

KAREN

29:15 Yes. Yeah. And right now, we're not big enough to have, a sales team.

SARAH

29:20 Right. Okay. No worries. I just wanted to double check because we do have another feature that can be bought into our software as well. I mean, within our, it's a partner or not a partner? It's part of us now, it used to be a partner. It's called Northboundary. I'm not sure if you're familiar with them, but they, it's a part of our software that can help you sell preventative maintenance agreements. And if you want, Susan can touch on that too. I can just put a little note in here that might be something that she can just kind of slightly mention while she's doing the demo with you. Okay? All righty. Well, is there anything else you would like me to add in here at the moment? Or did you just wanna go ahead and send over an e-mail with some more information?

KAREN

29:38 Huh.

KAREN

29:58 Okay.

KAREN

30:09 I'll send over the information yet. Once I talked to Karen, she has the list of what things we're trying to integrate through.

SARAH

30:17 Okay.

--- *Wrap-up* ---

SARAH

30:20 All right. Okay, good. Okay. Well, great. All right. Well, I hope you have a wonderful day chat. If you don't have anything else for me, I can let you go. I did send you that.

SARAH

30:32 That request. So if you could, it's a Google calendar request and the meeting will be over Zoom. And if you have any questions of how to get in, please feel free to let me know. But essentially, just click on the Zoom link and it should take you right to the meeting during the day and time. And if you could also just click accept on that calendar invite for me too, just so I know for sure you got it. Great. Okay. Awesome. Okay, great. All right. Well, thank you, Chad. I hope you have a wonderful day. Please let me know if you have any questions until then. Okay?

KAREN

30:33 Huh.

KAREN

30:53 It's already been done.

KAREN

30:55 Yes.

KAREN

31:03 You as well, Sarah. Thank you. Okay. Bye.

SARAH

31:05 All right. Thanks bye.

The End