



Call with Mahlon Mechanical Services - Dave Johnson

Tommy Polcari with Mahlon Mechanical Services
Recorded on 11/9/23 via SalesLoft, 7 min.

Participants

SERVICETRADE

Tommy Polcari

Associate NorthBoundary Account Executive

MAHLON MECHANICAL SERVICES

Dave Johnson

Principal

Topics

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Transcript

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

TOMMY

0:00 I'm calling for Dave please?

DAVE

0:00 Thank you for calling mail and mechanical. This is Liz. How may I help you? Yes. May I tell him who's calling?

TOMMY

0:08 Yeah, it's Tommy pullkary.

DAVE

0:11 One moment, you're welcome.

TOMMY

0:13 Thanks.

DAVE

0:34 Hi, this is.

TOMMY

0:36 Hey, Dave. It's Tommy pull carry with service trade. Do you have a quick minute?

DAVE

0:39 Sure. What's up?

TOMMY

0:41 Yeah, thanks. I appreciate it. I'm just looking at a follow up regarding that conversation I had yesterday with mail and he suggested to reach out to you. You know, I'm not sure if you're familiar with service trade or, you know, I just caught you out of the blue.

--- Purchase decision ---

DAVE

0:53 I've looked at it online. I was actually just on the phone confirming a demo for BuildOps for this afternoon, which is why I wanted to talk to you guys?

TOMMY

1:04 Gotcha. Okay. Yeah, that definitely makes sense. You know, if you're looking at BuildOps to, you know, also take a look at service trade.

--- Accounting integrations ---

TOMMY

1:11 I just want to reach out and kinda get a better idea of, you know, what drove you guys to, you know, take a look at software and kind of what you're using now and, you know, where that stands.

DAVE

1:11 Hello?

DAVE

1:20 So, last year we integrated Jobber, just to get the guys used to using an online dispatch, I know it's fairly remedial in what it can do.

--- Accounting integrations ends ---

DAVE

1:32 And I think right now based on our usage of it and what we want it to do, I need something that's a little more robust that can handle a little more data tracking so that we can involve the customer a little bit more on service calls and things like that, where we can either have an invite portal for them to see what the service was done, or just to get a better rundown other than having a handwritten service ticket turned in?

--- Accounting integrations ---

TOMMY

1:59 Gotcha. Okay. So, you guys are looking for like better tracking of data in order to show the customer to kind of build that customer experience?

DAVE

2:05 Correct.

TOMMY

2:07 Gotcha. Okay. And then, I'm curious what you guys are also using for accounting?

DAVE

2:13 Sage, 100 contractor.

TOMMY

2:16 Page one. Okay, perfect. Well, I'm pretty sure we do have integration into them.

--- *Paper process* ---

TOMMY

2:22 But, you know, you said that Jobber was kind of remedial, you know, other than, you know, kind of your data tracking, and having, you know, visibility for the customer. Are there other things that, you know, were causing some frustration in Jobber or kind of, you know, to help streamline things?

DAVE

2:39 Well, you know, it's yeah, if, you know, if we're doing a smaller approach, it doesn't require a massive submission.

--- *Type of work* ---

DAVE

2:46 You know, I'd like, to the software to be able to put together an estimate or a bid that we can send out. You know, if it's a smaller, I don't know one week job or something that doesn't require a bunch of metal tracking. And all that is something I can just quick slam together and shoot it out and.

DAVE

3:04 Job or does it, but it's kinda crappy looking.

TOMMY

3:08 Right. Okay. And are those projects like larger projects like more than six months or are they smaller like retrofit?

DAVE

3:15 No, no, no larger projects. We've got to put together a full different submittal and bid and whatnot, but we're talking about small stuff, you know, a week's worth of time or less. You know, it's maybe 50 or 60,000 or less.

TOMMY

3:22 Smaller service product?

TOMMY

3:25 Right.

--- *Accounting integrations* ---

TOMMY

3:28 Gotcha. Okay. And then are you guys using Sage to help like manager sales as well like a proposals and tracking, you know, new customers and things like that?

DAVE

3:37 Now, we're I mean, what I'm doing through Sage right now is I'm going through and...

DAVE

3:45 I'm taking a look at our service tickets and there's not a good report for me, to go through and see what my, you know, what our pull through is off of our PMS.

--- *Accounting integrations ends* ---

DAVE

3:56 What are, what are we gaining off our PMS? Because the PM, is a lost leader, but that's the pull through that you're trying to get from that and I don't have a good way, to track that.

--- *Customer engagement* ---

DAVE

4:04 So I've got to manually pull two different reports and manually merge them together. So I can see, you know, what, our cost is versus what our net revenue was. So, it's you know, it's tedious.

TOMMY

4:02 Right.

TOMMY

4:18 Sure. Yeah, no, I definitely understand that, and you know, that's one of the biggest features of service trade allowing you guys to capture as much revenue you can through your, pull through work. And then.

--- *Type of work* ---

TOMMY

4:31 You know, maximizing, that revenue from the customer? I was just, you know, curious how many service techs you guys have out in the field currently?

DAVE

4:35 Huh.

DAVE

4:40 Four.

TOMMY

4:42 Okay. And are they doing like service end projects, and Construction or just service?

DAVE

4:48 Just service?

TOMMY

4:51 Gotcha. Okay.

TOMMY

4:53 Well, yeah. Based on everything you're saying, I definitely think it'll be worth your time to, you know, sit down for a quick demo with, our territory manager.

--- Type of work ends ---

TOMMY

5:02 So I actually have their calendar pulled up. Not sure, you know what time would work best for you, but Alex does have some time open tomorrow afternoon looks like around 11 am eastern.

DAVE

5:01 Huh.

DAVE

5:14 Okay. And that's on that would be on a Zoom?

TOMMY

5:17 Yeah. So I'll send over an e-mail and that will have the information in it. So it'll be over Zoom. You'll just click on that link. It should take you right into the meeting. Does, that time works for you? Okay? Perfect.

DAVE

5:25 Yeah, that'd be perfect. Yep. Yeah, send over, the Zoom invite, and then we'll...

DAVE

5:33 If it's as long as it's from 11 to 12 because I've got an appointment at 12.

TOMMY

5:37 Okay. Yeah. I'll put down a note just to, you know, make sure that he knows that you have a hard cut off at 12. But what would be the best e-mail to reach you out for

that calendar? Invite?

DAVE

5:42 Okay.

DAVE

5:46 David mail and mechanical dot com, M a HL on mechanical dot?

TOMMY

5:53 Okay. All right. Perfect. And then will Maylan, be joining you? Or is there anybody else from your team that you'd also like to sit in on this just to get a perspective?

DAVE

6:01 No, I'll be doing just kind of the initial evaluation. I've worked a little bit with a handful of different.

--- Type of work ---

DAVE

6:10 Softwares. I used to use health call and service tighten. So really just trying to find something that, that's more geared commercial because house call clearly is not in service. Tighten, is more residential than it is commercial.

TOMMY

6:19 Right.

TOMMY

6:24 Right. And you guys are 100 percent commercial or do you do any residential work?

--- Type of work ends ---

DAVE

6:28 We do some residential, but I would say the majority of the work that we do, is commercially based.

TOMMY

6:35 Gotcha. Okay. Perfect. Well, I will send out that calendar invite. Like I said, if you can do me a favor and just hit accept. So, I know you received it and it blocks off that time. That'll be great.

DAVE

6:43 Yep. No problem.

TOMMY

6:45 All right. Perfect. Well, we're looking forward to speaking with you tomorrow.

DAVE

6:47 Sounds good. Thanks... you too. Bye.

TOMMY

6:49 Yep. Have a good one. Bye.

The End