



# Meeting with Darren Fleshman

Darren Fleshman with PSF Mechanical Inc  
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## Participants

### **SERVICETRADE**

Darren Fleshman  
*Field Manager*

Lauren Rice  
*Director of Enterprise Sales*

### **PSF MECHANICAL INC**

John Eldridge  
*Service Sales Manager*

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# Transcript

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DARREN

0:00 Wondering if I... looks like I missed a text message from John back on Monday... come through, but that's...

LAUREN

0:09 Hello, the air we saw meeting today?

DARREN

0:12 Yeah, he... he accepted this meeting.

DARREN

0:19 Yeah, I'll have to... apologize for that. I started this... would it be?

LAUREN

0:26 Yeah.

DARREN

0:27 Well, I had... I had texted him first to see if we could have this meeting with, for the meeting with the group. And I thought I hadn't heard from him, which is why I sent the email to the entire group and he had text me back at four o'clock on Monday. He was open at two o'clock on Tuesday or Wednesday at 10 or Thursday. At one. I didn't see it... that's weird.

*--- Purchase decision ---*

DARREN

0:59 I...

LAUREN

0:59 Think we avoid the pricing conversation until we figure out if they're still interested.

DARREN

1:05 Yep. Yeah. Because from his response... that makes me because he said that he's got some references to talk to now.

DARREN

1:27 This call is to finish up with the demos, review references and collaborate with the crew in the next two weeks.

LAUREN

1:37 Think the end goal is to just be to schedule a call with him in the team.

DARREN

1:42 Yeah.

LAUREN

1:43 Right.

DARREN

1:47 So, my guess is he's gonna make it so that we contact him and not the rest of the team.

--- *Purchase decision ends* ---

LAUREN

2:18 And he doesn't join. He published a column and then conference man.

DARREN

2:25 Yep.

DARREN

3:17 So, that DSL northwest their operations manager. He used to work for a company called tailor freezer sales of Arizona... in case you wanna look up that company and see if we're stopping by.

JOHN

3:45 Hey, there, super. Sorry.

DARREN

3:48 Hey, no worries. I need to apologize to you. I... I just looked and I saw that you text me on Monday, so there was no need for my email on Tuesday.

JOHN

3:59 No worries. Yeah, I just, we have tech, we're doing tech meetings right now because of... my new... my new field supervisor. So handling tech meetings and he's dropping some hammers and making some changes and people are winding crying and all that. I had a technician pull me aside after the meeting this morning and

outside talking and I let them, but what time is it goes to nine three four. I'm like... I apologize about that.

DARREN

4:27 Yeah, no worries. Yeah, making those changes as always... always a little tough, right?

JOHN

4:33 Yeah. In... in their big changes, so.

LAUREN

4:35 Hi, sorry. What does, what changes are going on?

JOHN

4:39 We're we're changing how we're doing on call. We're changing kinda set more expectations for what we want the technicians to do, how much involvement on customer interaction... putting more... putting more onus on trying to develop that. We've been kind of a smaller company. So everybody kinda jumps in and helps out. Well, that creates a know a clear path of who does what when it, if somebody's stuck. So we're trying to make sure that we follow a chain of command. We follow, you know, here's the process here's. Who you need to call that type of stuff. So he came from a country. So he's got a pretty wealth of knowledge and we're not trying to be mckinstry, but we're definitely cleaning up some stuff in. There are some things. I never even thought of them just like, well, it's Neil, this is all collaboration while you can't have too much collaboration and nothing gets done. So.

LAUREN

5:36 So like field supervisor. So they're like overseeing all like the technicians on the service and construction signs and like helping with sort of logistics.

JOHN

5:48 Yeah. He is service only. Cool. Yeah, not... not on the construction side. So just service.

LAUREN

5:57 Did... you... you didn't tell us that? Did you go? You're getting a supervisor... maybe Darren?

JOHN

6:05 Yeah. We may have talked about it in Scottsdale because he did start two days before that.

LAUREN

6:11 Hi.

JOHN

6:13 Jerry gave me about to Garrett, gave me two weeks notice. We were already talking to this guy about coming over and doing our service projects group.

LAUREN

6:22 Yeah.

JOHN

6:22 I'm in service. And so this was a way to get them in the door. Now take replace Jared. And then we're still looking at the service project piece also, but now that he's here, he's like I'm gonna fix this. I want to do this. I want to do this and I'm like sure, no problem.

LAUREN

6:39 How much of that kind of overlaps with your software evaluation?

JOHN

6:44 It overlaps quite a bit because since he's still involved like Jarrod, I am having him take a look, you know, pulling them into things like with Kurt and Michelle, I'm from the service side. So he's one of my leaders. Sorry, I'm having him take a look at stuff and I, and I'm having to look at what we have currently field tonight.

LAUREN

7:06 Yeah.

JOHN

7:07 As well as... what the country was using and does he think there could be some benefit with our... our current product? So I don't think we, I know there's not because I've already, I'm like, hey, do keep your mouth shut. I don't want to keep fill, connect and I'll see great things about it and you don't even work in it. So.

LAUREN

7:26 Yeah, he.

JOHN

7:27 Definitely has not for me.

LAUREN

7:29 Yeah. Do we need to set up some time with him to review service trade or is service trade? So being like... like considered within your organization?

JOHN

7:38 Yeah. So I've been pretty upfront with Darren service trade is still being considered that we did come across BuildOps at the MSC, a conference and they did say that they integrate with spectrum. So I have to take a look at it. Yeah. So what we've done at this point is look, we've done a couple of demos.

*--- Accounting integrations ---*

JOHN

8:01 They've... they've done what you have done in the past, but they've done a couple of demos. We've talked to them. I know Martin are, it is working with him on, you know, what does that spectrum integration look like? Even though you say you can integrate, what does it look like?

*--- Accounting integrations ends ---*

JOHN

8:15 We've reached out? We've had a conference call with Martha, talk to her because, yes, service trade still on the table. So we're still talking about what that integration piece looks like, the stacks or something we're going to utilize.

LAUREN

8:26 Yeah. He did... he did mentioned that.

JOHN

8:29 Yeah, we are going to go fully integrated. So that's why BuildOps has worked its way into the, you know, something that we need to take a look at. So we have another demo with them next week... more for the dispatch side to take a look. And then at that point, what I, what I'll be asking for them as a full blown proposal.

*--- Quote templates ---*

JOHN

8:50 And I'll probably come back. I know you've presented some pricing to us, but I want to lay out a full blown now that I have that I'm comparing to, I want to see a full blown proposal for service trade because then I'm going away out, we're going to put together a scorecard for, you know, customer service, all these different things. Price is going to be waited in there. But I'm not gonna make decision based on price.

*--- Quote templates ends ---*

LAUREN

9:13 Yeah.

JOHN

9:14 But if there will be some way to decisions in there, and then we'll be able to... to present to Mike and Kevin what we want to look, we're... we're choose.

LAUREN

9:23 Gotcha. So I guess back to the original question since Jared, you said his name was.

JOHN

9:33 After and during let.

--- Purchase decision ---

LAUREN

9:35 So, do we need, do we need to get... get connected with Andy so he can kind of go through the paces with service trade since it sounds like he's involved in the decision now?

JOHN

9:46 Yeah. Let me work with him on that because I want to find some time that he can maybe take a look, you know, a demo. So I think that's fair. Yeah, making a decision based on something that he saw and then something he didn't see.

LAUREN

9:59 Yeah, definitely. Well, that's cool.

JOHN

10:04 No, that's not the perfect answer. But I mean, honestly once I, if I wouldn't if I hadn't if BuildOps when it came up after the fact and only had an integration.

--- Purchase decision ends ---

JOHN

10:15 I mean, that... that could have been a career under for me. So I really have to do my due diligence to make sure that we, we've explored it because... yeah, I just don't want to risk my job because they...

LAUREN

10:28 No, I definitely, I just, I wasn't aware because they're such a new company. I wasn't aware that they had actually like a product that people were using. Coast. The last I had heard someone here in the actually company that services my building, they had invested in BuildOps and it six months later, they still weren't live. When I talked to one of the technicians walking around my building.

JOHN

10:57 Yeah. There, I'm with you there new. So I have like all my spidey sense is up because of how they're a little bit. They're new, they're smaller. I don't want to get back into there's. A couple of things they can't do that service trade does. So I don't want to get back into where I'm at right now with feel connect.



LAUREN

11:19 Bring stuff or what kind of.

JOHN

11:21 The, the reporting seems to be pretty good. The field app is good. The dispatch board to different look. They can't what they don't say they can do right now is do quoting in the field that can little girl?

LAUREN

11:37 Yeah.

JOHN

11:37 That is a Q1 product that they said is coming out in Q1 of 2022. So there's I mean, there's some there's calm red flags or some things that I'm concerned about because of the size.

LAUREN

11:51 Yeah.

JOHN

11:52 They are. Now, they do carry, I did call one of the MC president MSC, at Brett, former MSC president who's back in the product and had a conversation with him woody. And because he's in my shoes and been in my shoes before, so, I talked to him a bit, got some feelings from him. They have a local have electrical contractor here, a union electrical contractor here about 10 Miles away that I was able to speak with and they let us come in and take a look at the product to.

--- Pricing ---

JOHN

12:22 So there's some, I wanna make sure I'm doing my due diligence on if they are going to be considered that it, it's a good thing or a bad thing or if I say no, and there's a price difference that I know a solid because probably a significant price difference because the integration is included.

--- Pricing ends ---

JOHN

12:39 Where if we go with service trade, we have to pay a pretty significant amount to do the third party integration.

LAUREN

12:45 Yeah.

JOHN

12:46 So that's... that's what we're that's... that's what we're looking at. So, but yeah. So streets not off the table. I still think it's the leader, but I just want to do my due diligence here.

DARREN

12:58 Who's who's the electrical contractors that Cochran or Nelson or?

JOHN

13:02 Selector...

DARREN

13:03 Homes...

JOHN

13:04 Yeah. They're in, I think they're in can't.

LAUREN

13:08 I never thought I'd here then... then Nelson electric again?

JOHN

13:15 Well, they a former service trade customer?

LAUREN

13:17 No, no. They... they have an interesting problem and not, they want a service software, but their entire business is so averse to change, just never went anywhere.

JOHN

13:33 I have now hired this guy from mckinstry because we've I've talked me out. What does mckinstry use for software bubble on all this type of, and he said they are so big, they will never change. He goes, the cost for them to have to change would be so significant. And he goes there, mckinstry. And if you want to deal with mckinstry, this is what you get, they are pretty high and mighty have their name and I don't think they would ever change because they, when they've tried things that didn't work and it costs a ton of money.

LAUREN

14:05 That's actually gonna bode well for you because if they can't a change and adapt to like what people are expecting nowadays, I think that'll give you a leg up with when you compete against them.

JOHN

14:19 Yeah, yeah. I have people that deal with mckinstry deal with them because they have to, not because they want to happen. So.

LAUREN

14:28 So, why do they have any leads?

JOHN

14:30 He was looking at... originally, we're going to bring them over for we were talking to him about the service project group. So he would have been the leader there. Now when he was at mckinstry, he was running it, but he wasn't in charge of it here at PSF. He would have been in charge of it. That's still the goal. And that's why we're making a lot of changes pretty quickly internally because we want to get the field dialed in. We want to get some processes fix. The sooner we get that dialed in and he can turn the keys over to somebody and then he can focus on service projects because that's where it's passion is and that's a growth area for us as well.

*--- Type of work ---*

LAUREN

15:08 Yeah.

JOHN

15:08 And we tend to turn it over to our special projects group. We just don't own it in service and now we want to own it. Plus we're more reactive than proactive and there's a lot of money sitting out there for more proactive, but we just don't have it before.

*--- Implementation and ongoing support ---*

LAUREN

15:22 You know, Darren brought this up yesterday since we're on the topic of special projects... and around about way we should... we should show you when it's live. It should be in the next two weeks or so. Some of our project management stuff. That being really.

JOHN

15:44 We need to take because that's... that's our future. I'd like to be doing service special projects in the next six months to a year.

*--- Implementation and ongoing support ends ---*

LAUREN

15:51 Yeah, definitely.

JOHN

15:52 In fact, we're presenting might Gifford on Friday. We're presenting them a plan of how we want to do it, what the structure should look like and what we need from engineering and stuff like that. So, yeah, in handy is driven and that's awesome. If he

doesn't I mean his whole goal is to get to that. So if I forget to follow up on an email for him with it to set up our on call service, I hear about it. So he's completely well.

LAUREN

16:20 Yeah.

JOHN

16:22 He's a pretty good dude. I... I think I miss Jared. He was part of this Foundation but I scored with Andy. I really?

LAUREN

16:30 That's awesome. Cool. So I don't think I have any more questions gems.

JOHN

16:38 I will be honest with you. I know what it's like to be a salesperson have some like this, make a change and stuff. So I've been on your side of the issues on the plate on that side of the table. I guess. So I get it. I understand that. I'm chat and that's why I'm really, you have put effort into it. I'm really trying to be, I'm... I'm being as up front as I can be.

LAUREN

16:58 Yeah. Leave that for sure. At the end of the day, you know, I... I sound like a broken record but we really stand by our mission which is to help businesses like yours be more valuable to their customers and grow their business. But there used to be a little Asterisk in there and... and that aspect was use technology to be more valuable and grow their business. And regardless of what technology pick, I hope it's the one that's... that's really gonna align with your needs and... and further the admission, the mission of your company. So I totally... totally like love that you're doing the due diligence because the last thing we want is for you to come on board with us and then have like buyer's remorse or get fired. Yeah.

JOHN

17:49 Yeah. What I... what I will be asking from you is probably a refresher on a full blown proposal, what they'll look like implementation. I know you won't have the, this, the... the integration piece that's a price I have to come up with but I'd like to know just to refresh it. So if you wanted to get something like that ready over the next week or to you?

LAUREN

18:10 Yeah.

JOHN

18:10 Because I'm gonna... I'm gonna compare them side by side with that is one of the criteria is... is, you know, it's going to be, how does the implementation process? Look? What's the implementation costs, any type of renewal costs, the licenses, that

type of thing because that I'm gonna... I'm gonna put them up and we're going to power out for a few hours once we get to that point.

LAUREN

18:32 Yeah, we'll... we'll start working on that. In the meantime, we'll look for you to kind of coordinate with Andy. So we can have some time with him and then from there probably have another call at this where we kinda share... share our proposal with the implementation timeline and things like that. I might have Tanya who I believe you met, get up with Martha just to make sure that we're all on the same page with expectations of what she's selling. Yeah, and everything like that.

JOHN

19:05 Yeah, that definitely would be a good idea because that would be the piece that we would need to understand the spectrum integration because that would be if they can see add to that.

--- Purchase decision ---

JOHN

19:15 That's... that's a, we would be going that direction. We're not going into the stack process. Yeah, I kinda liked the sand, the sound of it. It's more money, but I liked that they want to do at one time and I'm pretty cool with the, Andrew and Martin wanting to do that. And if they want to spend the money on me, okay with it, I gotta pay for it, but they want to spend, they're going to spend my money...

LAUREN

19:39 That's so funny. Well, cool. Darren, did we have anything else we wanted to ask last John?

DARREN

19:49 I know that you said in that email that you were talking to some references. Did you get some references from BuildOps that are using the integration currently?

--- Purchase decision ends ---

JOHN

19:57 Not yet. I did speak with the... the... the folks here homes electric. I did call them because I did see it on their side when I was at Emma CA, and they do they use Viewpoint not spectrum. So, but it's still... and we're in the other thing that I'll be honest to, the other thing that came up is we learn Martin through this whole process is learn some more about spectrum and needing to go to the cloud.

--- Accounting integrations ---

JOHN

20:21 So that was a whole nother issue. Is they're looking at okay time out? We need to look at the spectrum piece just as a company and a whole ticket us from being on

the server to the cloud. So they're all other regal that they've they're trying to deal with that's completely unrelated to this.

*--- Accounting integrations ends ---*

LAUREN

20:37 I wonder if that will change anything as it relates to Martha and the proposal on that side of thing.

JOHN

20:43 I don't think so because they were aware of it, they're the ones that actually between Martha and build ups talking about it. And then it just happened to be that we were talking and within that week, we got something from spectrum bringing it up. So.

DARREN

20:58 Spectrum has a cloud based option as well. Okay. Yeah.

LAUREN

21:03 Well, that, do you think that will extend your teams like time line at all?

JOHN

21:09 I don't... I don't... I don't know that for sure because everybody that we've talked to you as far as like cap out at western allied, and then the two other companies.

*--- Accounting integrations ---*

JOHN

21:18 So they partnered up with Martha in our welcome, this other company. They are all ready all using spectrum on the cloud. So that didn't seem to like put a hiccup before us other than maybe we should be doing that sooner than later, but we didn't get the feeling from mark that wouldn't be that big of a deal if we started here and then went to the cloud on the spectrum.

*--- Accounting integrations ends ---*

LAUREN

21:39 Yeah, you don't wanna do that though? No good twice?

JOHN

21:43 No, they found that it was gonna cost a lot more money to stay where they're at if they, so they're looking at the cloud option pretty quickly now.

LAUREN

21:51 Yeah. Well, it's good. Yeah, we'll keep us in the loop on that. Yup. Darren and I'll work on getting some updated price. I just sent Tanya message, so we'll... we'll connect with her and then.

JOHN

22:04 Do you think maybe we could?

LAUREN

22:05 Make some time to meet with Andy next week maybe?

JOHN

22:08 Let me check with his schedule. Let me see what he's got going on. And then definitely, I'll... I'll... I'll reach out to.

LAUREN

22:14 That's good.

DARREN

22:15 Perfect.

LAUREN

22:16 Right.

JOHN

22:17 Yeah, thank you. I appreciate yet. And I do appreciate you keeping checking in.

LAUREN

22:22 Yeah, of course. We're not going away like I always say like you're going to be a customer. We just don't know when.

JOHN

22:28 You know, what? We've gone this far this long without it right now.

--- Purchase decision ---

JOHN

22:33 I wanna just make sure I got it. I got all my ducks in a row says, you know, I put my neck out there for a ton of money that Kevin's got to spend. So I wanna make sure it's the... it's the right for everybody, me in for there where they're investing?

--- Purchase decision ends ---

LAUREN

22:47 You just tell us other, if there's anything else we can do to make it a little bit easier on you and take some pressure off of you, so.

JOHN

22:54 Absolutely. I will do that for.

LAUREN

22:55 Sure. Sounds good. Okay. Alright... alright. Thank you later.

DARREN

22:59 Bye.

*The End*