



Call with CFM Mechanical LLC - Unknown Unknown

Logan Engel with CFM Mechanical LLC
Recorded on 4/26/22 via SalesLoft, 5 min.

Participants

SERVICETRADE

Logan Engel
Account Manager

OTHER

Phone Caller #1

Topics

<i>Pricing</i>	3:02
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Transcript

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

PHONE CALLER #1

0:00 Thank you for calling pueblo Arizona's leading HB AC, plumbing and controls company. For quality and training purposes, this phone call may be recorded. Please listen closely as our menu options have recently changed. If you know your party's extension, you may dial it at any time or if you don't know their extension, you can press nine for our dial by name directory for service.

PHONE CALLER #1

0:28 We're sorry, but that is not a valid option. Please try again. If you know your party's extension, you may dial it at any time or if you don't know their extension, you can press nine for our dial by name directory.

PHONE CALLER #1

0:42 Welcome to the directory. Please enter the first three letters of your parties first or last name, using your attach town keypad. Use the seven key for Q and the 90 for Z.

PHONE CALLER #1

1:00 Press one for K a TIE space, T a YLOR extension one zero two five, press two for K a TIE space SENT.

PHONE CALLER #1

1:35 That's okay.

LOGAN

1:37 Hi, Katie. I'm not sure if I reach the right, Katie. I was doing the touch soon, spell the name keypad. And I'm not sure because another Katie started popping up on there. I'm trying to get in touch with the service manager. Would that be you?

PHONE CALLER #1

1:52 I'm in the service department. Yeah. What's going on?

LOGAN

1:54 Okay. Cool. Yeah. So, my name's Logan, I'm calling from service trade. I'm I called a while back and whoever I spoke with, she said that you weren't available. I think you're in a meeting or something. I'm not sure. But anyways, I'm calling from service trade. We're field service management platform. And I just had a few

questions on your commercial side, like if you all were doing pen and paper or using the software for communicating with your text out in the field, invoices, scheduling, and dispatching, stuff like that and keeping track of your work orders.

PHONE CALLER #1

2:30 Yeah. We actually just signed an agreement with another software company and we're in the process of migrating over to their software.

LOGAN

2:40 She, okay. Gotcha. Who did y'all, just out of curiosity who joined up going with?

PHONE CALLER #1

2:42 Yeah.

PHONE CALLER #1

2:46 We're with BuildOps.

LOGAN

2:48 BuildOps. Okay. I'm kind of familiar with them. So, are you all more residential then?

PHONE CALLER #1

2:51 Okay.

PHONE CALLER #1

2:54 No, we do a lot of commercial.

LOGAN

2:56 A lot of commercial. Okay. Gotcha. I could be wrong, but I think BuildOps is more geared towards residential.

--- Pricing ---

LOGAN

3:02 They can obviously handle the commercial side, but I'll have to brush up on my learning of them. Well, I'm happy that you all just signed. Did y'all, signed like a one year? And I said least contract?

PHONE CALLER #1

3:05 Okay.

PHONE CALLER #1

3:15 I honestly don't know the contracts specific, how long it is. I just know that the contract was just fine.

LOGAN

3:19 Okay. Gotcha. Okay. Cool. I was gonna ask if you all be open to a comparison demo, but since you all just started probably not quite yet.

PHONE CALLER #1

3:30 Yeah, unfortunately, probably not.

LOGAN

3:33 Gotcha. Is it okay if I follow up in like four months with you all and kind of see where y'all are at with it?

PHONE CALLER #1

3:39 Sure. That's fine.

LOGAN

3:40 Okay, cool. Alright. Well, thank you so much, Katy. I hope you have a wonderful day. Would you mind answering just a few more questions for me? I just wanna make sure when I follow up, I don't waste all time and vice versa because there are certain requirements for companies that we work with. You said that you do a lot of commercial work. Is it like 50 50?

PHONE CALLER #1

3:52 Sure.

PHONE CALLER #1

4:00 No, we're like 99 percent commercial.

LOGAN

4:04 Even better for us in the future then hopefully, and then how many commercial technicians do you all have for service?

PHONE CALLER #1

4:13 We're right around 30.

LOGAN

4:16 30. Okay. Gotcha. Alright. And then for accounting, are you all using Quickbooks?

PHONE CALLER #1

4:24 We are not, we were using Intacct.

--- Pricing ends ---

LOGAN

4:27 Okay. Gotcha. Alright. And I think that is it cool. Well, I'll follow up with you all and a few months and kind of see where y'all are at, and I wish you all the best of luck with BuildOps.

PHONE CALLER #1

4:34 Okay, perfect.

PHONE CALLER #1

4:40 Alright. Thank you so much. Bye bye.

LOGAN

4:41 Thank you. Bye.

The End