



# Call with Western Allied Corporation - Todd Buchanan

Ben Bilhorn with Western Allied Corporation  
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## Participants

### **SERVICETRADE**

Ben Bilhorn  
*SDR*

### **WESTERN ALLIED CORPORATION**

Todd Buchanan  
*Vice President*

# Topics

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# Transcript

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

BEN

0:00 Hey, Todd, this is Benjamin with ServiceTrade. How are you doing?

TODD

0:05 Doing all right, man. Thanks. How are you? Yeah, I'm on the.

BEN

0:07 Good. Did I catch you at a decent time?

BEN

0:11 Gotcha. Yeah. So, I wanted to check in with you guys because it's been a while, I think since we last spoke, but yeah, you know, service Cade with a field service management software, you remember number?

TODD

0:26 Sorry, my GPS. Yeah, no, I don't where you guys are.

*--- Pricing ---*

TODD

0:30 I know we have just transitioned into using BuildOps last year just in February and we're having some issues with our maintenance integration stuff and we were able to get some of those worked out since summer was kinda hectic, we were just, trying to manage and now we've gotten things covered. We've got down able to get some things are out, but I think we're kinda stuck with them for a while and it's working out. So, I don't see any reason why we'd be looking to change just yet.

BEN

0:29 Gotcha. What do you mean? Stuff with them? Like you guys renew your contract?

TODD

1:04 What's that?

BEN

1:05 You guys renew your contract?

TODD

1:08 We actually, we just did, we had our annual meeting with them two weeks ago, so I would assume it's already been signed and renewed.

BEN

1:14 Okay.

BEN

1:16 I imagine. So. Gotcha. So I don't think that we had had the chance to unpack any of those.

BEN

1:25 When I, when I last spoke with you and like just started onboarding, just finished onboarding. So I don't think we even move. I don't think we even do much... more for you guys yet, but tell me a little bit about what ended up. What, what was it with those with the incident?

TODD

1:43 You're really multitard what you're saying?

BEN

1:46 Yeah, I said, tell me a little bit about what you, what the issue you guys were having with the integration.

TODD

1:54 They have a, they have a maintenance module that the way that we schedule our guys wasn't the way that they had their module built around, our guys essentially get all their maintenances for a particular month, the beginning of the month and they use those as fill in time between service calls when they get slow. So the guys schedule themselves and, they front load all of the maintenance package at the beginning of the month. The way that they had them set up was similar to jobs where they had to actually schedule and put in a specific location and time slot. And a lot of that didn't work the way that we operate because we can get the technicians a flexibility to schedule that direct to their customer. So they were able, to give us a word around. But, the hard part was because we're still new to, we were just trying to figure out how to keep everything growing during the summer time, that we kinda pushed it off until we had a slower time to figure out how to make it work for. So, we met with that before and they were able to.

BEN

2:01 Okay. Gotcha. Cool. Well, I would.

BEN

2:54 I would like to suggest that we plan on kind of recapping service trade closer to the end of is it just a year renewal? How, how long are you guys for?

TODD

3:06 Yeah. Our, our fiscal year is November first and we set it up to where it kinda tracks that. So, I think two weeks ago, I wasn't a meeting but two weeks ago, we had kind of, our annual follow up thing to see how things were going. They renewed it to get that period with the additional, but that we need for new text, we hire.

BEN

3:10 Okay. Gotcha.

BEN

3:23 Gotcha. Okay, cool. Yeah. Let's here's. What I'll say, I think we should plan on at least showing you guys service trade or giving you guys the update on service trade like end of Q1, something like that because if we wait too long, you're gonna get into the summer, but I would like to for you guys to ServiceTrade. So when renewal time does come up in the fall or I guess around this time next year, you guys can kinda comparison point has the time to.

TODD

3:53 Sure. Yeah, it doesn't hurt to reach out. I mean, if we're having problems, I, I'd see maybe entertaining it. But if everything's going smooth, I don't know that I'd want to go through that all up again.

*--- Pricing ends ---*

BEN

4:02 Right, right. Well, I mean, I would say, my... main point is that we had really been success with the company, right? They're one of our best customers.

TODD

4:16 That...

BEN

4:17 So, you know, I think if you...

BEN

4:21 If you feel like if you feel like BuildOps is going to, is.

BEN

4:26 Equally as strong for you guys?

BEN

4:30 That's one thing, but...

BEN

4:33 I don't know. I mean, obviously, I'm a bias source I.

TODD

4:34 Sure. Understandable. I think the big thing for us is a lot of was initially that integration, the way that BuildOps integrated seems a little bit more seamless. And I know that California had some issues with the, they were syncing POS, so, that was one of the reasons we had kind of looked in their direction. But then the cool thing, is now that we've been with them and I'm only being honest with you because I'm let you know we're at, is that when we do have specific issues, we e-mail the, their development team and then they try to build something that works with the way that we operate rather than just here's our platform and figure out how it works for you, they would tweak and make something to where, it kinda fits the post that we already had in place. So that's been nice. And, the initial year that we had because we weren't sure how we were going to integrate whenever we use Construction employee, or controls employee, or somebody, we were able to have some floating accounts, which now that we've got it kinda dial in, we're paying for the accounts that we created now. But that first year we kinda had a free for all. So the flexibility was kind of what was intriguing to us because there wasn't really a whole lot of.

BEN

4:37 Would suggest.

BEN

5:23 And...

BEN

5:48 Well...

TODD

5:50 I don't wanna say stick to structure type of mentality but because they're developer were able to work with us directly like, okay, cool. We can kind of customize this thing the way that we want it.

BEN

5:53 Yeah, yeah. And I think that's you know, that's definitely.

BEN

6:04 Mostly.

BEN

6:06 Indicative of the stage of companies that build up to that right now because they've been around for like three years, right? So they're very.

TODD

6:12 Sure. Yeah.

BEN

6:15 Trying to do whatever they can to make sure that they can like get a hold on the market grab companies like you guys and keep you guys happy.

TODD

6:22 Right?

TODD

6:26 Yeah, we did. I mean, there was some wrinkles too. I mean, it wasn't perfect. I don't want to say that there was a seamless change over, but, we did talk to other contractors too because we were having some issues that we were asking them. Hey, can we talk to some other people that you're working with to figure out how they're getting a work around? And when we talked to those contractors, they kind of expressed some of their frustrations that they're having with a similar situation we had. But they had also been in contact with the development team. So it was nice. So that was already kind of in the queue for what they're working at. It brought the developers to our office to sit down and hear how we actually ran that maintenance side of things and they were able to kind of build it at no extra cost too, which was a cool part though. We're gonna be charged for this, but, they kinda developed it around the way we did it because they're a value and maybe providing that type of same future customer. So that was nice.

BEN

6:56 Right. Yeah, that's that is very nice.

BEN

7:20 I definitely understand that.

BEN

7:23 Well, cool. Well, yeah, I mean.

BEN

7:27 I think either way, I'm gonna probably keep up with you guys. Like I said, end of the.

TODD

7:30 Sure.

BEN

7:33 You know, I still think ultimately you guys are gonna land on service trade. That's my gut. Yeah, I mean, we've and we've got a lot of cool stuff. We got a lot of cool stuff coming down the pipeline too. We're we're working on like I generated like post call notes and stuff like that so we can put in their repairs and then it'll in like plain English, say to the customer. This is what happened instead of like, and this is

kind of an over simplification of it because of the feature that's still like on its way out, but... yeah, we're able to talk about it more pretty soon. I think we even have.

TODD

7:39 Okay. I know the northern California guys speak super highly. I know Jeremy James to guys like we do to just buy the soft pros that we own it?

TODD

8:02 Okay.

TODD

8:17 Okay.

TODD

8:22 You guys have anything in place or working on anything for either bar codes or to our codes to be applied to the units tracking?

BEN

8:30 We already have that, I think because we, I mean, our background is in fire, right? And so that's like really important for extinguishers is every has a bar code on it. And so if you wanna do extinguisher inspections, you have to do like you can scan it and they'll tell you everything about that extinguisher right away. And if you have a bar coding, like if you can, if you have bar codes, you can apply to the units and we can set it up such that it automatically like auto populates that kind of information.

TODD

8:32 Okay.

TODD

8:39 Okay.

TODD

8:48 Okay.

TODD

8:58 Okay. Because that's actually what we're trying to work with them on right now because all of our tools have QR codes and we have QR code generator that we label all our tools and, our stuff, we wanna try to integrate that into the equipment itself. So we can rather than guys having to model numbers, they just scan it and they can get the asset and all the information there.

BEN

9:17 Gotcha. Okay. And so they're working on developing that for you guys right now yep?



TODD

9:21 Well, that's one of the things on the queue that we talked to them about that they're going to be trying to figure out how to work with the QR system we have.

BEN

9:26 I see. So, so is it going to be guess made for your guys specific implementation there? Yep?

TODD

9:35 No, they, well, they, they've already got somewhat of a platform that they established with bar codes, just a vertical lines and we could probably implement that, but we were trying to keep it towards already kinda integrated with the QR system that we have. So they're trying to figure out, how to get that scanning feature into their platform to kinda integrate with what they already have in place?

BEN

9:42 I see what you're saying. So it would just be.

BEN

10:02 It would have to be, it's more about it, recognizing your specific QR codes than it.

TODD

10:07 Correct. Yeah, it's basically reading the language that we're putting out there?

BEN

10:10 Okay. That makes sense.

BEN

10:12 Yeah. Is there, is there anything else that you guys are you guys have in the pipeline that you're trying to have them?

TODD

10:18 No, they, I wouldn't like I said, I wasn't in the annual renewal meeting, but they pitched their CRM software, but the crap that they got, but not that really piqued our interest.

BEN

10:26 What, did you, I guess you didn't get the chance to learn much about their CRM, did you?

TODD

10:32 I did honestly, there's really not a whole lot that we're doing on that front because the way that we operate, our sales people are also our project management people. We're we're basically cradle to grave everything from start to finish. So we don't have people that are just doing the CRM side of it. We everybody's doing like it's cradle to grave from inception to death. And then obviously carrying it on for years and years to try to keep it manageable.

BEN

10:44 Yeah.

BEN

10:57 Right. Gotcha. So in terms of wait, so I guess I'm curious then why wouldn't that CRM be? Because like don't those project managers then still have to like sell.

TODD

11:10 Well, they do, but, we track it through our spectrum because I think you guys similar to new California, we use spectrum or Viewpoint integration stuff with BuildOps. So all the stuff on the back side is what's handling all of the CRM that we're that basically the stuff that we're not gonna monitor is all handled on the back facing kind of things not integrated with BuildOps.

BEN

11:11 Like...

BEN

11:29 Right, right. No, I mean, it's interesting that because I, I've heard about their I'm trying to find out more about it because I've heard about it recently and it was, we acquired north bound. You're familiar with Northboundary?

TODD

11:45 No.

BEN

11:46 So Northboundary, they've been around for like 10 years but, and they already like work with like a comfort systems USA and stuff like that, but we picked them up as our sales management platform that now works with service trade.

BEN

12:02 Like last year and then build up within probably like six months or so ended up buying. I believe the company was called shark fight... and yeah, yeah. And that's gonna be kind of their, I guess answer to Northboundary, if I'm framing it like that, that's my understanding of the situation. I'm curious what kind of, I would, you know, obviously sounds like you don't know, but I figure out anything.

TODD

12:13 Yeah, they put it with somebody like that.

TODD

12:16 They just did that recently.

TODD

12:30 You got it.

TODD

12:37 We, yeah, we've got the reporting that we're building through spectrum and Viewpoint. I don't even know about that side of it. A whole nother nightmare. I didn't want to get involved but I know we have people that work on this stuff. They're the ones that are generating the reporting for, the, I don't want to use the buzzer, but all the KPI'S and everything that people are looking for, that's how we're managing it through Viewpoint and spectrum side. So it's doing everything that we needed to do. So even told, I gather one that they pitched this thing to our office manager, Katie, and James bottom, the other service that was in there, they're like now that's really not anything that we're interested in. So I don't just, there's a whole lot that you guys would provide that would help us do something more than what we're doing already on that side of it.

BEN

12:56 The biggest strength or on our front is not really in like the reporting is good, don't get it wrong. But the biggest strength is it's a really robust proposal building tool, right? So in terms of like if you have a maintenance that you, you're trying to build out for our customer, you can do things like.

TODD

13:33 Okay.

BEN

13:39 Put in the like age or like.

BEN

13:45 Like status of each individual unit that they have, right? And...

BEN

13:51 Basically build out a proposal that takes into account like all of, the status of all of the equipment that the person has.

BEN

14:00 And basically like protect your guys margins based on the equipment, based on the equipment essentially. So it's a more like holistic kind of approach to quoting out maintenance agreements that protects you guys margins a little bit better. And then.

TODD

14:17 Okay. So usually, just to give you a background how most of our work is, right? We do very little if not at all cold. Call it's all either referral or it's our Construction departments completing a job and hands it off to a service manager to then pick the maintenance off of the completion of the Construction project?

BEN

14:37 Right, right. And so, and in that case, the advantage would be less in like going in and trying to evaluate, okay, this is existing system with this level of where, how do we build the main agreement to this? And it would be more about just understanding the.

BEN

14:55 Tardiness of the system that you guys have install and it's still, it's the same. I mean, the same principle still applies, right? It's just on new equipment instead of trying to figure out. In fact, you guys would probably have better data because you're able to see like, you know, we've install, these pieces of equipment before we know how long they last a.

TODD

14:59 Okay.

TODD

15:16 Well, and then, so, that brings up a good question that I think most of these CRMS use like astracycle data to try to tell you what, the life cycle on that particular equipment is? Is that similar to what you guys are looking at also?

BEN

15:24 Exactly.

TODD

15:30 Okay.

BEN

15:31 Yeah. Do you know, is that what the build ups one uses as well?

TODD

15:35 Probably, I would assume. So, I mean, I don't know how else somebody would generate their own meaningful way of determining that unless they're seeing equipment.

BEN

15:41 Yeah.

BEN

15:44 Yeah. I mean, I know that, I know that that's what we do. I don't know if that's what they do but.

TODD

15:48 Okay.

TODD

15:51 I would assume so.

BEN

15:54 Yeah, I know it makes them pretty awesome. Say that. So that's like that would be kind of like the benefit that I would see of any sort of CRM pro for a company like you guys would be less in the reporting and more in the making strong proposals that are, you know, gonna keep you guys happy and keep you guys?

TODD

16:19 Okay. Yeah, I mean, it doesn't hurt, to touch, I mean, if there's any pain point that we have, and you guys might be able to answer that, then we'll probably be interested. But, if things are going smooth, I'll just be on with it, we're probably wouldn't be looking to make a change, but it doesn't hurt to stay in touch.

BEN

16:19 Yeah.

BEN

16:33 Understood understood. And yeah, that, I mean, software changes are not fun. So that's fair.

BEN

16:40 You know, like I said, I think I would much rather keep a strong working relationship with you guys, long term, you know, and when the time comes, we'll be here.

TODD

16:49 Sure.

TODD

16:52 All right. And I appreciate you reaching out and thanks.

BEN

16:54 Yeah, likewise have a great rest of your day.

TODD

16:56 You do the same, take care.

BEN

16:58 Bye bye.

*The End*