Call with Hamilton Smith Ltd. - Andre Palmateer

JennyKay McSweeney with Hamilton Smith Ltd.
Recorded on 2/17/22 via SalesLoft, 9 min.

Participants

SERVICETRADE

JennyKay McSweeney
SDR

HAMILTON SMITH LTD.

Andre Palmateer
Owner and Partner

Topics

Transcript

ANDRE

0:00 Thank you for calling Hamilton smith.

ANDRE

0:03 If you know the extension of the person you wish to speak to, please enter now.

JENNYKAY

0:06 Okay.

ANDRE

0:12 Please hold while I try that extension.

ANDRE

0:18 Okay. Hello, Andre speaking.

JENNYKAY

0:32 Hey, Andre, this is Jake. Hey, with service trade. Do you have a quick minute?

ANDRE

0:36 Yes, I do.

JENNYKAY

0:37 Okay. Awesome. I don't know the service tricked me a bell for you. I talked to you last year and he wanted me to call you in January. We're field management software company.

ANDRE

0:46 Yes, definitely rings a bell to me up.

JENNYKAY

0:47 Okay, good. So kinda calling to see where you guys were at. And if you're interested in, I'm doing a demo with us... again.

ANDRE

0:58 Where things are still extremely busy, which is good. Not a complaint.

JENNYKAY

1:02 Yes, praise God.

ANDRE

1:05 And it's yeah, I mean, we are looking at changing our internal stuff right now, as far as our tech programs that we run on our tablets and stuff. So, yeah, there's something we could maybe look into that we'd be interested.

JENNYKAY

1:23 Okay. Awesome. Let's go ahead and schedule something. What... what are you guys experiencing right now? Like what makes you say? Okay, we need to change.

ANDRE

1:33 Our system is, I don't know what the proper word archaic. I guess you could call it, it's like an old men, something. It's... it's... it's not the most user friendly system.

JENNYKAY

1:38 Okay.

JENNYKAY

1:44 Okay. I think I lost you. It's an old system. Okay? So, it's... okay... okay. And let's see. I'm kind of looking at if you guys have 50 text technicians. Is that correct?

ANDRE

1:48 Yes, it is.

ANDRE

1:57 Yeah, we'd be a little bit more than that, but in that ballpark?

JENNYKAY

2:01 In the ballpark, and you guys do all commercial services?

ANDRE

2:04 Industrial commercial, yes.

JENNYKAY

2:06 Industrial commercial and all guys are on... on services. And so, do you guys do a lot of preventative maintenance agreements, recurring services? Perfect... perfect. We are made for each other now when you guys are out in the field and you're looking for repair opportunities, how are you guys reporting those currently? Is it... is it through your system now?

ANDRE

2:15 Yes, we do.

ANDRE

2:27 Well, typically, the recommendations are made on the work orders and work descriptions, and then the recommendations are brought back from the text to their managers or supervisors, and then it's taken from there to whether it goes farther goes to the quoting or discussions with the owner or clients.

JENNYKAY

2:33 Okay.

JENNYKAY

2:39 Okay.

JENNYKAY

2:47 Okay. So I take it, you're system as paper. Is that correct? Okay. So, when, what... what kind of work orders are the guys using?

ANDRE

2:51 We are not paper now.

ANDRE

2:57 So, we use a tech anywhere system it's called.

JENNYKAY

3:00 Okay.

ANDRE

3:01 Which is by databases.

JENNYKAY

3:04 Okay.

ANDRE

3:06 And, yeah, they input their stories time, material information on the, on their tablets.

JENNYKAY

3:07 Cool.

JENNYKAY

3:16 Okay.

JENNYKAY

3:20 And what is like if you were to say I wanted the perfect software, I wish this darn software would do that. What would that be? What kinds of things are you looking for?

ANDRE

3:30 Wow, that's... that's tough because our program now like it has everything combined, right? Like it goes all our accounting, everything's done through it. So that's where we have the bit of a downfall is how all that operate a, there's a lot of manual inputting and everything like that. As far as between our accounting and the way our work order system, works, is it's actually quite confused? I'm probably not the best one would be talking to about me more better. Our office manager would give a better explanation.

JENNYKAY

3:38 Okay.

JENNYKAY

3:44 Okay.

JENNYKAY

3:58 Okay. Okay. Got you.

JENNYKAY

4:03 Okay. So when we do the demo, do you think the office manager should... should be on the call just to get, or do you, what do you want to be the only one on the call?

ANDRE

4:13 Probably now, like as far as what you guys do, is it... is it more like tech assistance or is it everything from the work order system, time inputs, accounting? Is that everything?

JENNYKAY

4:28 We do everything except for the accounting and like we're going to do your full service cycle. So, we're gonna do work where management scheduling, dispatching. We're gonna help you keep track of your preventative maintenance agreements when the guys are out in the field. If you guys are currently looking for pull through revenue, correct? When you, when the guys are doing a Pan.

ANDRE

4:50 Typically, yeah, I mean, they, we always, yeah, the normal looking for stuff yet.

JENNYKAY

4:54 Okay. Yep. Yep. So we're gonna help you be able to track the repair opportunities and help you with quoting, invoicing all of that entire full service cycle.

ANDRE

5:13 Okay. Yeah. I think probably what I would do is put you in contact with my office manager just because she's going through the process of a couple of these demos with other companies right now.

--- Wrap-up ---

ANDRE

5:25 So, she'll already be kind of prepared as to what to ask you and what to look for or... or answer your questions for that matter.

JENNYKAY

5:24 Okay.

JENNYKAY

5:30 Okay. Okay. Perfect. And what was her name?

ANDRE

5:35 Her name is Shannon?

JENNYKAY

5:36 Shannon? Okay. Perfect. I will, if you want, I can, are you saying you want to send me over there now?

ANDRE

5:45 What I could do is I'll... I'll explain the, Shannon and I'll have her. I can have, if you want to send me an email, I can reach, I can respond to your email with Shannon attached, and then you'll have her contact information. I'll let you two girls take it from there.

JENNYKAY

5:51 Okay.

JENNYKAY

5:56 Okay.

JENNYKAY

5:59 Yep.

JENNYKAY

6:02 That sounds like a perfect plan. Let me go ahead and send you an email right now.

JENNYKAY

6:09 I'll just send you like a informational email and that's at Andre P.

ANDRE

6:13 Okay.

ANDRE

6:16 And she may... she may have my business partner Pat possibly sit in with her just because he's... he's kinda fronting this with her to looking into this, so.

JENNYKAY

6:30 What do you? Yeah, do you even know what... what software that you so far? They've looked at?

ANDRE

6:39 Our software, the, what? Sorry?

JENNYKAY

6:41 Do you know which software they've looked at so far?

ANDRE

6:47 So, have you ever heard of BuildOps?

JENNYKAY

6:49 I have indeed. Yep.

ANDRE

6:51 So, BuildOps is the one that we're really... really are considering right now and it partners with Quickbooks.

JENNYKAY

6:55 Okay.

JENNYKAY

7:01 Okay. With it. Yeah, go ahead.

ANDRE

7:02 Which, which is ideal for our accounting firm as well.

JENNYKAY

7:07 Okay. So you also use Quickbooks?

ANDRE

7:10 Yeah. So with the BuildOps, is it's not done internally, which is similar, I think to what you're under or explaining to me how your system works, but at all, I don't know if it automatically again, that's for Shannon and pay my Bill to answer this better?

JENNYKAY

7:27 Yep.

ANDRE

7:28 As things are input, it... it automatically goes through a, not quite sure how that works.

JENNYKAY

7:32 Okay. Okay. Awesome. So I'll probably call back and get Shannon as well to, after a couple of questions and I just sent you an email and you can send her that as well.

--- Wrap-up ends ---

JENNYKAY

7:46 And then we will go from there. We work with, we are also partners with Quickbooks. Do you know if... if Quickbooks online or desktop or?

ANDRE

7:55 No, I don't I think they can work with Quickbooks or Sage one of the two?

JENNYKAY

7:56 Okay.

JENNYKAY

8:00 Okay. Yes. So, the way...

ANDRE

8:02 Which is the probably the two most important or most familiar ones. Everybody.

--- Wrap-up ---

JENNYKAY

8:06 Yeah. Okay. Perfect. So, if I let's say this, if I don't hear from Shannon by five, I'll call her tomorrow. You want to do that.

ANDRE

8:14 Sure. I'll let her know right now. I'm gonna get off the line, I see she's on another line right now. I'll pass this information and respond to it with you... and... and we'll go from there.

JENNYKAY

8:16 Perfect. Okay, perfect.

JENNYKAY

8:23 Okay. Sounds like a plan. All right. We'll talk to you soon. Thank you. Bye bye.

ANDRE

8:28 Okay. Thanks. Bye now.

The End