



# John & Alec | Meeting

Alec Ashby with Derby Fire Services  
Recorded on 11/17/23 via Zoom, 23 min.

## Participants

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

### **DERBY FIRE SERVICES**

John Southard  
*Partner*

# Topics

<i>Call Setup</i> .....	0:00
<i>Pricing</i> .....	6:07
<i>Next Steps</i> .....	15:27
<i>Pricing</i> .....	17:50
<i>Wrap-up</i> .....	22:38

# Transcript

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--- Call Setup ---

JOHN

0:00 There you go. How about now?

ALEC

0:01 Can hear you now. Can you hear me?

JOHN

0:03 Yes.

ALEC

0:04 Seems like you've had an eventful Friday to get everything taken care of.

JOHN

0:08 I have, yes, it's been good.

ALEC

0:11 Gotcha. So it wasn't anything too bad.

JOHN

0:14 No, no, I just needed a ride. So it was good. Will they'll get the truck taken care of? Just the, I needed to get them off the street, so.

ALEC

0:23 Yeah, yeah, I can see that definitely being stressful, you got a lot of plans going on for thanksgiving next week or what does that kinda look like for you?

JOHN

0:31 Right now, yeah, looking like we're gonna stay busy up through Wednesday. And then I'm leaving town, so.

ALEC

0:40 Okay. Where is your folks out of?

JOHN

0:41 Illinois...

ALEC

0:43 Gotcha. You gonna drive or fly or?

JOHN

0:45 I'm driving? Yeah.

ALEC

0:46 I...

JOHN

0:47 My daughter lives there. So I'm going there for first time she bought a house moved there this year. So it's her job to house thanksgiving.

ALEC

0:58 Yeah. Now, that sounds fair to me. I mean, I'm sure you supplied the Turkey for quite some, time, just pass the baton.

JOHN

1:06 Yep.

ALEC

1:08 Okay. Cool. And then one other quick question for you. I know, yes, or I don't know if it was yesterday or a couple of days ago.

JOHN

1:14 Mentioned...

ALEC

1:15 To me that you were looking at a couple of different platforms. Did you ever remember which ones you were looking at?

JOHN

1:21 Yeah. Hold on, just a minute. I got emails from them.

ALEC

1:24 You're good?

JOHN

1:29 Here... I know what it is.

JOHN

1:41 It is so BuildOps.

ALEC

1:45 Okay. Gotcha. Cool. And then, as well as I know Melanie was on the last meeting. Did you run anything by anyone else? I don't know if you got my recap, e-mail but did you run anything by anyone else?

*--- Call Setup ends ---*

JOHN

1:59 No, no. We really haven't had a lot of time since then yesterday was a company outing like, so wasn't we didn't talk a lot about business and stuff, different things and some other things have been going on that have taken a higher priority. So when we do, when we have had a chance to talk, but no, I have not had a chance to talk to anybody else. But so far I got to tell you that I am happy with what I've seen. So.

ALEC

2:25 Okay. Yeah. And that's totally fair. You know, I understand that, you know, there's other things that you got going on. I'm sure, right? Software is probably not the thing always top of mind. And as well as at a company event, you never want to talk too much about business to stress people out. I know I'm not the best at that sometimes. Okay, cool. And then besides Melanie, is there anyone else that's going to be involved in the evaluation? No, okay.

JOHN

2:52 There's me.

ALEC

2:53 Okay, cool. And then one more thing I want to confirm. I believe you told me this last time, but I just wanna make sure we're on the same page. I mean, did I show you everything you needed to see last time? Was there anything outstanding that we didn't get to last time that you'd wanna see or?

JOHN

3:09 If we chose not to use our fire alarm inspection, do you all have a default one that you guys use or no?

ALEC

3:18 So in short, probably considering your budget, no, we do, however, we have this module. It's called the inspection manager. I wanna really recommend you get started with it. But the inspection manager, a lot of those forms in that software are based on the nfpa and we actually have someone at our company that's served on the board there. So it's designed to make sure that you guys are up to code so that's

something you could grow into the future. But I'd recommend just starting out with your forms now.

JOHN

3:53 Okay. And what? So the modules are extra?

ALEC

3:58 Correct. So inspection manager is a module. You would also have to upgrade to the premium plan. People typically start considering that plan around eight to 12 text, although we do have quite a few customers that are around five that have the premium plan as well.

JOHN

4:12 Right. So the module will then be included in the premium then?

ALEC

4:18 No, it's not included, but you get a lot of other stuff with the premium plan as well. One popular thing being our customer portal, a lot of our customers like using that for the sales side as well as, you know, your customer could go on your website, log in, look at all that stuff. So, you know, typically people that get the most out platform are doing a ton of inspections like a lot of inspections. That is something you could grow into. I'd say since you're already doing it on paper. Now going up to this would be a big step. And then that's definitely something you could explore down the line. I just don't really think it's probably makes sense.

JOHN

4:55 You to do.

ALEC

4:56 It now though?

JOHN

4:57 Right. So, how expensive would that module be then on top of the premium? If, when we get to that point, if we go to that point because I am looking in the future to go with an spa form which are a little harder to read, but it takes some of the liability then off of us on certain things and stuff. So.

ALEC

5:19 Yeah. So that, as far as how that product is priced out, I mean, I could definitely get back to you on an idea because it is a kind of complicated product. A lot of it depends on how many forms you have. Do you need customization? Do you like our forms or would you want us to use your forms because some of our customers wanna use their forms. And the reason they wanna use inspection manager is another part of the platform that people like about it is it's very intuitive and it has something called conditional logic which basically means like, hey, if you click this, it's going to guide you to that. If you get what I'm saying like, very, it's conditional logic as well as

when a form, when a deficiency is reported on a form, that deficiency process is the same way that I showed you earlier, as far as the premium plan.

--- Pricing ---

ALEC

6:07 It is one 39 per tech per month billed annual. And then as far as the inspection manager, I could get back to you on like a general range, my guess would be you'd be probably one to three years out for really highly considering that product. But I don't know sometimes people sign up with service trade and they get really good results and then they just wanna keep spending money with us because we're getting the results. So it all kinda.

JOHN

6:31 Right. Okay. All right.

ALEC

6:34 Cool. Well, you guys. Sorry?

JOHN

6:37 No, that was it. That was my only question.

ALEC

6:40 Okay. Well, what I can do, I don't know if you had a chance to look at the quote I sent you, I could go through the quote that I put together for you. Just, you have an idea of how much this costs that sound good to you?

JOHN

6:50 Yes. Okay. Let me find it.

ALEC

6:54 Or I can share my screen if it's easier.

JOHN

6:56 Okay. Yeah. Let's do that?

ALEC

6:59 Just give me one sec. And by the way, I do have a meeting at 10 30. So that's why I have this stuff here because I got to hop off with you and hop off with someone else. But essentially, like I said, John, I recommend our select plan. It's going to cover you up to five technicians. Basically in your first year, you'd be looking at an investment of roughly above 7,000 dollars. What that's going to include is an onboarding experience. So with that onboarding experience, you're going to get an implementation point of contact someone here in the states that works local in Durham. They're going to be in charge of your implementation. Typically if

companies of your size, it takes anywhere from 30 to 60 days to go live with service trade average being about 45 to 50. Their job is to take any data that you have in your Quickbooks or any data you have any spreadsheets, put that into service trade. Their job is to also ensure that your staff is trained to you, your technicians, your admin, like Melody. And then as well as once you're done with that implementation, you'll then get passed off to an account manager. You'll have a dedicated person to manage your account. Their job is to make you happy. You can meet with them every quarter if you want for things like inspection manager, or upgrades. They're going to be your point of contact for those kinds of discussions. So basically what you're looking at as a first year investment of slightly over 7,000 dollars. And then on an annual basis, you'd be looking at 53 40.

JOHN

8:25 Okay. So, is there a minimum of five texts, correct?

ALEC

8:28 The select plan starts at five technicians with you guys growing 35 percent every year. I mean, how many texts do you think you'll be at next year? Yeah.

JOHN

8:37 Hoping to add two more. So I think we'll be at five next year, but I don't know we'll see it was a slow grow at first but we've picked up rapid growth in the last two years. So hopefully we'll be at five next year, but right now, we're only at three. So.

ALEC

9:03 That's what this plan is designed to do is it's you know, obviously you might have some turnover, you might hire some people you're set. And then once you get above five, you can have that conversation, but you're going to be set up to five.

JOHN

9:16 Okay. All right.

JOHN

9:23 Okay. I wasn't aware of the minimum of five. I thought it was just a per tech thing. So it's 5,340 annually. All right. I'll take this talk with my partners and see what we're gonna do. So I actually have something for you by Wednesday of next week.

ALEC

9:49 Okay. Nice. And then when you say your partners, I know you kinda mentioned to me on the last call that Troy would like, are you saying Troy or are you saying your partners? And then like this company?

JOHN

10:02 I have three partners in this company. They don't do much for it. They're they're just partners that we meet, once a week and talk other things, you know, company



things, but they don't active are not active in the day to day stuff. And then Troy, the three partners I have, they all own the company that Troy runs, but they don't but the two partners that Troy has in, that are also partners of mine. They don't do much in Troy business. They have their own. They, they have to be pressure wash that you guys did last year or, you know, you did the presentation for last year. So it's kinda like a trickle down. Those guys bought, you know, when in partners with Troy and then them and Troy went in partners with me. So, so I have...

ALEC

10:56 Right.

JOHN

10:56 But we usually meet on Thursdays, but since we're not meeting next Thursday, I should have an answer by Wednesday because we'll be getting together and we may be getting back together this afternoon. So.

ALEC

11:09 Okay. And what do you think is going to be top of mind for them? Or what kind of questions do you anticipate them having?

JOHN

11:16 The, the minimum, is a question is one of the things they're gonna have, but that's really all I'm thinking that they're going to have is that question and whether or not they want to go forward with that. But in the end, I don't know, I mean, I know, I, yeah, that, that's really the question. I think they're gonna have.

ALEC

11:40 Okay.

JOHN

11:41 Okay. Because I've told them it was like 89 a tech or something, was what I was thinking I was seeing. And so then that was 89 a month, but I didn't tell them we'd have a minimum on this one. So, which was one of the things I liked about it and then, but, it, it's definitely looks good. So that, that's my only drawback is the minimum.

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ALEC

12:09 Okay.

JOHN

12:10 I understand having to have a minute. We have a minimum hours is that we go on a job site. So, I mean, so I understand having to have it, but that's my only drawback...

ALEC

12:23 And, and what do you think a service trade maybe compare to BuildOps? Like are you leaning one way or the other? Or?

JOHN

12:30 Stray...

ALEC

12:33 Yeah, gotcha. Okay. So, you said you have an answer by Wednesday and... I'm just trying to think here. Okay? So, is there any information you need from me for that meeting you're going to have between now and Wednesday?

JOHN

12:48 I don't think so. I think I got a pretty good grasp, of the stuff you presented for us.

ALEC

12:56 It's...

JOHN

12:57 Pretty good grasp of what we can do with it. So, I think as long as I get time with them to talk and explain things, I think that they're going to be good with what ServiceTrade can do. But like I said, it was just the minimum stuff that I think they made question. But in the I'll deal with it. So we'll see what happens.

ALEC

13:20 Okay. And I mean, if that's their only issue, just please let me know.

JOHN

13:26 I...

ALEC

13:26 Will, and I can always see what I can do because I don't want them to think this is the be all end all, but I also don't wanna promise anything. Like if I get enough buy in from them, I can always see what I can do.

JOHN

13:40 And like I said...

ALEC

13:41 At the end of the day, it's not going to be anything crazy, but I just don't want, I don't want, I know this is going to do a lot for your business and I don't want that to be the only reason you want to move forward. But this is basically what I'm saying.

JOHN

13:52 Right. Well, and also, I think it might help you might be able to do a little more if Troy comes on around at the same time, you know, with extra techs and stuff, you know, you might be able to do a little something that way but I don't know. But because, Troy has five or six texts now plus himself or whoever else. So more tech. But again, I don't want because you mentioned not having this, if we can, if we have to have different logos or different, I mean, because we don't we just don't want invoicing coming from the same place. So we would have to have separate accounts. It sounds like so. But being that we're partners sometimes we get, you know, a little leniency in stuff like that since we would both be doing it. And I know we'd have to talk to you about that after I get Troy's input on whether or not he would like to go forward with it based on this. And if that's the case, you know, and if he has any questions that I can't answer, I'll definitely put him in touch with you and then we can work something out. But right now, I'm not, I don't necessarily. I don't think Troy is as far into it as I am as far read. So, but he's more disconnected... than I am. He doesn't he doesn't do field work like I do so, right? But, yeah.

ALEC

15:17 The sense I got on the last call and that, that's totally fine. I mean, if it was just your decision, what do you go with this?

JOHN

15:25 Yes.

--- Next Steps ---

ALEC

15:27 Okay. Well, Troy, I mean, not, Troy. I've been talking to so many people. I'm starting as my mind, I think what we should do is we should definitely put some time on the calendar for Wednesday before you have to travel to Illinois.

JOHN

15:44 Okay.

ALEC

15:44 Basically, and, that call, I wanna kinda get the feedback from the people you speak to. Now, if you speak to them today, and that conversation goes well, obviously, give me a call and we can, you know, get you a contract, but I think we should at least put some time on the calendar Wednesday to, you know, just touch base and see if this is something you wanna move forward with or not.

--- Next Steps ends ---

ALEC

16:05 One thing I would say is that, you know, if you get a little bit of push back on that, what I'd recommend is I sent you a data study in the recap e-mail I sent you is based off real data from our customers. And really the way that a lot of people find

that service trade pays for itself is that deficiency process. So if you can kinda outline to them like, hey, I think less deficiencies will fall through the cracks. We'll be able to send more quotes out. And then I forgot the company you mentioned the other day, but you guys already have a sense of what they look like. I'm sure they do as well. Yeah, I'll just kinda maybe explain that of like, hey, that's really how this is gonna pay for itself. Obviously, there's a lot of other stuff, but that's kind of what I would lead with, if I was you.

JOHN

16:50 Yeah, those are usually the words that, they throw out there. When I mentioned making a purchase, is it gonna pay for itself? Is it gonna make us more money? So, so they'll definitely be asking that how long till it pays for itself or what have you. So those are the questions we go through. So let me look to make sure I've got the other stuff. Let me make sure I got that e-mail and...

ALEC

17:18 Good. I think I sent it to.

JOHN

17:24 On the fifteenth, right? Yep. There you go. Meeting. Got it. It says, no, that was the invite for this one.

ALEC

17:31 I...

JOHN

17:32 Sent it.

ALEC

17:33 On the sixteenth at about 10 a M.

JOHN

17:38 Okay. Yup. Got them. Fire.

ALEC

17:41 If you look at the bottom there, there's this fire industry benchmarks report and this goes through what are highest performing customers.

--- Pricing ---

ALEC

17:50 What kind of results they're getting are average performing customers and even our lowest performing customers? And that pull-through rate. For example, if you look at this here for a mental performers is about 13 percent and it's about 19 percent. So that would be something I'd share. And I mean, just give you an idea real

quick. I mean, for your deficiency quotes, what would you say is like the average value? Is that like typically 500 dollars 1,000? Do you have an idea on like what the average value of that would be?

JOHN

18:25 Inspections?

ALEC

18:26 Or just the deficiencies, like the.

JOHN

18:29 Deficiencies, I'd say probably 750 dollars.

ALEC

18:35 Okay.

JOHN

18:36 Somewhere between 500 and a 1,000.

ALEC

18:40 And then, is that margin typically like 35 percent, 30 percent? Do you know what that typically looks like?

JOHN

18:47 Usually like 55 percent?

ALEC

18:49 Yeah, wow.

JOHN

18:50 Yeah.

ALEC

18:51 Really good. And I mean, how many more quotes do you think you guys would get approved a month using something like service trade if you were to be conservative?

JOHN

19:01 I think we'd get a lot more. I would say, probably... I'd say 15 to 20 percent more easily because he's the speed of getting them out, will do it because while the inspections there, they're good. But once we do, once we do the inspection that we two weeks go by, they get the, they get the quote and then it's like, well, I've already done my inspection. I'm good. And it's like, no, there was a problem and you have to

explain things. Whereas if you do it all at once, you send them their inspection with the deficiency and stuff and you're good to go. And they, they're like, okay, we gotta get this fixed. Malidy, I run into. So.

ALEC

19:45 Yeah. And like you said, one, the pictures and stuff like that will really tell a story. But two, the faster you send it out, typically, the faster you get a response because people's attention spans nowadays are so low. You don't send it out, you know, the day of, if not the next, I mean, obviously, you can't always do that because of parts, but, you know, people forget real quick. Like you said, so if that was 15 or 20 percent, would that be like four, six? Like, what would that be like number wise? If you're to be conservative?

JOHN

20:18 We're talking monthly or annually or just each one?

ALEC

20:22 Say, like each week. So if you were to get 50 15 to 20 percent more quotes approved, how many more jobs would that create a week? You think?

JOHN

20:30 I would say probably, I don't think we missed more than one a week, maybe to one a week, I would say probably so 750 a week. So.

ALEC

20:43 Been super conservative here. Basically like, I mean, I could send you this if you want, but I just kinda put that together. I mean, I feel like you guys might get better results than this, but we wanna be, you know, very conservative because we don't want to obviously show them something that just looks obnoxious. But if you're even able to create one more job a week because you're able to report more deficiencies, get the quote out faster and get it approved. I, but conservatively 49 work weeks in a week, taken out three. And then I took your average job price of 750 and then I put your margin in here.

JOHN

21:18 Yeah, I.

ALEC

21:19 Mean, this doesn't even include like managing the inspections of the time savings and.

JOHN

21:23 Efficiencies exactly extra deficiency a week.

ALEC

21:28 That's what you'd be looking at based on what you just told me.

JOHN

21:31 Right, right. Okay.

ALEC

21:36 So, I could send that to you if you think that's helpful or if you got a good memory that's something maybe I'd mentioned, but.

JOHN

21:43 All right. I just took a picture of it. I'm good.

ALEC

21:45 Nice. Okay. I appreciate that. So what will be a good time for me to touch base with you Wednesday? I definitely wanna make sure that you're getting on the road. I'm sure you got some packing to do. So I got a little bit of available in the morning and same with the afternoon. So what would work best for you?

JOHN

22:01 Let me look, see what we got going. Career. Birthday. Looks like. I'm good. Why don't we do 11 o'clock if we can.

ALEC

22:10 Yeah, I can't quite do that time. I could do a 10 45 if that's not too weird for you.

JOHN

22:16 That'll work.

ALEC

22:17 Okay, sweet. So I'll send you a calendar invite for that. If anyone from your team, either, the board, it seems like is one way to call it or even Troy. Now Troy wants to talk to me next month or whenever. I mean, no rush with him. But if he wants to reach out definitely.

JOHN

22:32 Just let me know.

ALEC

22:33 But I'll make sure to follow up you Wednesday on the 20 second at 10 45.

--- Wrap-up ---

ALEC

22:38 I might send you a couple of emails between now and then maybe on Monday or Tuesday just to make sure you're still good to go. And then we'll go from there. But if, by chance, you know, you have the conversation today and you wanna move forward quicker, obviously, you can always just give me a call or shoot me an e-mail...

JOHN

22:52 We can figure it out. Sounds good?

ALEC

22:55 Sweet. Well, hey, John. You have a good weekend. And then if you need anything from me, just let me know. Okay?

JOHN

23:01 All right. We'll do. Thank you.

ALEC

23:02 I go. Bye bye.

*The End*