



Call with Harrison-Orr Air Conditioning LLC - Joe McKenzie

Brian Corridore with Harrison-Orr Air Conditioning LLC
Recorded on 12/5/23 via SalesLoft, 15 min.

Participants

SERVICETRADE

Brian Corridore
SDR

HARRISON-ORR AIR CONDITIONING LLC

Joe McKenzie

Topics

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Transcript

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

JOE

0:00 Harrison or?

BRIAN

0:03 All right.

BRIAN

0:09 Hey, good morning. This is Brian again. I believe Troy just tried to give me a shout back. I was just returning his call here.

JOE

0:16 Okay. I said you said Troy... yeah. Okay. Yeah. Hold on.

BRIAN

0:18 Yeah.

BRIAN

0:21 Okay.

JOE

0:31 Hello, is Troy?

BRIAN

0:32 Hey, Troy. Good morning. This is Brian over with ServiceTrade. How are you doing this morning?

JOE

0:37 Yeah, I'm pretty good. How are you?

BRIAN

0:39 Doing well, doing well. I can't complain. Yeah. So I'm not sure if service trade rings a bell for you. I know we've spoken with some folks in your office a few times but does service trade ring a bell at all for you?

--- Type of work ---

JOE

0:50 I think you and I might have talked a while back possibly.

BRIAN

0:56 Okay.

JOE

0:57 Yeah, I think, yeah.

BRIAN

0:58 Yeah, I'm not seeing that in my notes. We, we may have talked. I make so many calls a day. It's hard to remember some times but just to give you a quick kind of recap, so, we're a software platform and we're specifically designed for commercial service contractors. So, what we help with is that we help simplify their workflows for things like scheduling and dispatch, managing work orders, and driving more sales as well. So, I was really just kinda curious how you guys, are managing your work orders at the moment, you know, if you guys are on, you know, pen and paper tickets still, or if you had a software you were happy with?

JOE

1:02 Yeah.

JOE

1:30 Well, we, what we have currently is we have, it was made by Davis old as 2000 that's what it was called.

BRIAN

1:38 Okay. Yeah, yeah.

JOE

1:42 And in fact, we're kind of in this limbo stage because, our company, you know, is primarily Construction, you know, industrial commercial Construction for mechanical and plumbing.

--- Accounting integrations ---

JOE

1:57 And of course, when we have, you know, a service department and we got about 30 people in the service department total.

--- Type of work ---

BRIAN

1:55 Okay.

BRIAN

2:03 Okay.

JOE

2:06 So, they've purchased, you know, a... new software system to do the accounting and everything, but they just haven't moved to it yet. Meanwhile we are having, you know, or the 2000 is old. It's not supported anymore. They've kinda not really want to probably, you know, upgrade to the new version of that because they don't think it's gonna integrate. And so, I've been kinda shopping around trying to find something intermediate to use until they make the move to that, which I don't know how long that's gonna be, you know? Yeah, because.

BRIAN

2:14 Okay.

BRIAN

2:22 Yeah, comes to, okay.

BRIAN

2:30 Right, right.

BRIAN

2:40 Gotcha. Okay. Is, is that an accounting software or you said you guys were moving or you purchased an accounting software, but you just haven't used it?

JOE

2:46 Yeah, it's no, they've got it. It's...

JOE

2:51 You know, have to forgive me. I think it's called structure. It's Construction software, but it's supposed to have a service module in it as well.

--- Paper process ---

JOE

3:02 So, but it's something that goes company wide, you know, it take care of everything. But, but at the moment, you know, with the old system that we've got and then after COVID, you know, we kinda got away from paper tickets. So we use a third party.

BRIAN

2:58 Okay.

--- Paper process ---

BRIAN

3:01 Gotcha. Okay.

BRIAN

3:06 Sure.

BRIAN

3:17 Okay.

--- Accounting integrations ---

JOE

3:20 Like a digital ticket that they turn in and then it still has to be integrated into the S2 thousand for billing and all of that. So it's really kind of a pain in the neck right now.

BRIAN

3:28 Gotcha.

BRIAN

3:30 Right. So, so they don't communicate with each other. You all, they're doing like, the invoicing and work orders and then you got to bring it back, and fill it into, the accounting software.

--- Paper process ---

JOE

3:38 Well, what they basically do is, so, so they go out on the job and they fill out the, you know, for lack of better words. I just like a digital service ticket. And then when it gets into the office, well, then... the... billing, you know, when they Bill it well, then they have to take that and convert it into the other system so they can create the invoice from there since it's not the same platform, you know, so, which it never really was anyway because when it was still, you know, the S, 2000, you know, at that point, when we bought it years ago, well, they were still using a paper ticket, you know, and then COVID happened and we got away from, you know, nobody wanted paper anymore. So, so, we just eliminated, the paper work order and it went to a digital one but you still have to enter it in there. So it's not all in the same spot is really, you know, it just adds it's added, you know, some more time and, you know, we've gotten a lot more busier and grown a little bit this past year. So now it's become a problem because it's starting to bog down because that takes time. Yeah, yeah, too much time. Yeah, yeah, scheduling dispatch.

BRIAN

3:46 Okay.

BRIAN

4:02 Right. Yeah.

BRIAN

4:15 Okay.

BRIAN

4:17 Yeah, yeah, yeah, I totally understand.

BRIAN

4:28 Right, right.

BRIAN

4:38 Okay.

BRIAN

4:40 Awesome.

BRIAN

4:44 Right, right. You are spending too much time on it. Yeah. Okay. Yeah. I mean, so ideally, you guys would be looking for a software that, you know, could, you know, really just handle everything from, you know, scheduling a dispatch, and, you know, are you looking for, are you looking more for like something on the service side, or just, you know, both Construction, and service?

--- Accounting integrations ---

JOE

5:02 No, it would just be right now strictly for the service side since they've you know, like I said, they've already got the software that they want to eventually move to over there... you know, and it's kind of and I can't remember the name of the, I talked to a guy at another company... like FieldEdge maybe. Is that, is that one of them, you know? And, and their whole deal was, well, it only works with what is it Quickbooks or whatever, you know, that's the platform and I'm like we don't use that. And so, it's like, well, that's not gonna help you at all then.

--- Invoicing ---

JOE

5:39 So I said all I need to do is to be able to produce an invoice to turn into accounting so that they can enter it into their system at that point, you know, on that

end because that's all we do right now for them anyways, we just turn in, the invoice, and then they enter it into the system however, they, I'm not an accountant. And so, I don't know what goes on back there, you know? So, yeah.

--- Accounting integrations ---

BRIAN

5:06 Okay.

BRIAN

5:12 Gotcha.

BRIAN

5:24 Yeah, I've heard of you.

BRIAN

5:33 Okay.

--- Invoicing ---

BRIAN

5:40 Right.

BRIAN

5:48 Huh. Okay.

BRIAN

6:00 Sure. Okay. Yeah, no, that I will say, you have a ton of integrations. Tell me the name of the accounting software you're using again?

--- Accounting integrations ---

BRIAN

6:09 It was, I think I wrote a structure, right?

JOE

6:12 That's the one, that they're gonna move to? Yes. Yep. Yeah.

BRIAN

6:15 Gotcha. Okay. Now, as far as like if we have an integration with structure, I'm not 100 percent sure, but, we can custom build integrations as well.

--- Accounting integrations ends ---

BRIAN

6:24 So, I'm pretty sure we can have that covered, but that's just a, you know, a conversation for one of our territory managers, excuse me?

--- Accounting integrations ---

JOE

6:22 Right.

--- Accounting integrations ends ---

JOE

6:24 Yeah.

JOE

6:32 Yeah. And, and I don't know how soon they're you know?

JOE

6:36 You know, if it's gonna be this year next year, you know, because I mean, it's gonna be a major project to do that, you know, to convert it all. And so, but right now, what I'm just basically gonna do before our next busy season is come up with something that's gonna handle the dispatching, the timekeeping and the invoicing, you can get it all in one location.

BRIAN

6:39 Yeah, that was going to be one of my next questions.

BRIAN

6:44 Yeah.

--- Paper process ---

BRIAN

7:00 Okay, perfect. So dispatching time keeping, and what was that last thing, you just said there?

JOE

7:00 So...

JOE

7:05 The invoicing, you know, the, so it's all. Yeah. So in other words, you know, the call comes in, dispatcher gets it, you know, logged in and then it gets sent directly to the tech and then he fills out whatever whether it's on a tablet or their phone, and then it comes in here. And then they just Bill it straight from, the platform. There's

no, you know, third party. So to speak, at the time, you know, because we already have, you know, we have some, you know, national accounts where, yeah, you still have to fill out a few things for them. So, that adds another, you know, thing you've gotta do if you've got to add their form to something. So, I'm just trying to eliminate on our side, you know?

BRIAN

7:06 And invoicing as well?

BRIAN

7:15 Okay.

BRIAN

7:24 Right, right.

BRIAN

7:29 Okay.

BRIAN

7:39 Right, right.

BRIAN

7:43 Okay.

BRIAN

7:46 Yeah, definitely. Yeah, I definitely would recommend taking a look at what we're doing over here.

--- *Type of work* ---

BRIAN

7:51 I think we would definitely have a, you know, very solid middle ground here. Let me ask you this though. You said you had a 30 guys on the service side of things in the service department are all of those technicians? Or?

JOE

7:55 Yeah.

JOE

8:00 The department overall? No, no, we've got.

JOE

8:07 There's probably here. I can tell you real quick. Two four, six eight, six. We got 19 hvac technicians and six plumbers.

BRIAN

8:19 Okay. Gotcha. Are those guys cross trained at all? Like to do it and plumbing or?

JOE

8:21 Yeah. And then.

JOE

8:25 Nope, nope. They're separate. So, our hvac technicians are hvac, and then our plumbers are plumbing, and then of course, in the office, you know, I've got two estimators, dispatcher, billing clerk, actually got two dispatchers. And so then there's an additional one, two, three, four, five, six, seven of us in here.

BRIAN

8:26 Gotcha.

BRIAN

8:45 Gotcha. Okay.

JOE

8:46 So, yeah... and then we've got some premises, you know? So overall, there's about 30 of us in the service department. So, yeah.

BRIAN

8:48 Okay, perfect.

BRIAN

8:54 Gotcha. Okay. But only about 25 actually doing service. Okay?

JOE

8:59 Yeah, yeah. About 25 guys in actual service trucks. Yep.

BRIAN

9:02 Okay. Perfect. And then how is like the like I know you said you do a lot of Construction for commercial and industrial, but you also do service like how, how's that kind of broken up for you guys? What, what percent would you say is like Construction versus service?

JOE

9:16 For the company?

BRIAN

9:18 Yeah.

JOE

9:19 We're I mean, well, we probably have over 100 employees on the Construction side out in the field. So, because we have, you know, sheet metal shop, you know, pipefitters, you know, plumbers, so there's a lot of people. So we're just, you know, the service departments relatively a small, you know, important part, but very small part, you know, so far as the overall company, of, you know.

BRIAN

9:27 Okay.

BRIAN

9:34 Right.

JOE

9:50 You know, as far as the amount of, I mean, we trying to think how a good way to say it is, you know, we have the smallest department, but we probably get the most exposure. Obviously, as far as, you know, because, you know, the minute they're done with a Construction project, well, any time there's a problem where our guys are the ones going out and dealing with it. Yeah. So, yeah.

BRIAN

10:01 Right, right.

BRIAN

10:10 Right. Okay. Yeah, that makes a ton of sense. Okay? And on the service side, are you guys more focused on like break fix service? Or is it more like preventative maintenance and like service agreements?

JOE

10:21 Well, we, I mean, of course, obviously just general service calls. You know, we have PM customers that we, you know, quote PMS to go out. We don't do any full service contracts though, we don't do that. We stayed out of that, and we still, you know, we don't solicit it. We, we still have because the company was started in 1960, so, we still have long time residential customers that have been with the company forever, you know, and, you know, if they want to call and pay us, we'll go take care of it. We don't go out actively seeking it, of course, but yeah, so.

BRIAN

10:31 Okay.

BRIAN

10:36 Okay. Gotcha.

BRIAN

10:41 Wow. Okay.

BRIAN

10:50 Yeah, definitely.

BRIAN

11:01 Right, right.

--- *Type of work ends* ---

BRIAN

11:03 Okay. Gotcha. Yeah, honestly, it definitely sounds like this would be a, you know, a good fit for you guys, especially if you're looking for something strictly for the service side of things.

JOE

11:05 Yeah.

JOE

11:12 Huh.

BRIAN

11:14 I think I have, you know, all the information I would need to, you know, set you up with a quick demonstration, but what would mornings or afternoons usually work a little bit better for you just to take a quick look?

JOE

11:22 Probably afternoon is better, yeah, if we could, because, what I do, we actually just did a demo a couple of weeks ago with that BuildOps?

BRIAN

11:25 Okay.

BRIAN

11:34 Okay. Gotcha.

JOE

11:34 Take a look at theirs but, and it's neat. My boy. It's pricey that stuff is, yeah, they are super proud of their pro?

BRIAN

11:38 Yep.

BRIAN

11:43 Yeah, yeah. I hear that all the time for build up. That's actually, one of, our bigger competitors, is build ups. So, they definitely, I don't want to, you know, say anything bad about them, but...

JOE

11:45 Yeah.

JOE

11:48 Yeah.

JOE

11:53 Yeah, sure. No, no, no.

BRIAN

11:55 No, yeah. They're they're definitely, you know, up there, if you guys are looking at, you know, service module, they're definitely, you know, something else if you were to look at something else, I would definitely recommend build apps, but yeah, no, we can definitely get you in, and see, you know, how apples compare to apples, you know?

JOE

12:05 Yeah.

BRIAN

12:10 So, let me take a look here at my calendar. So afternoons you said, is there a day that you had in mind that would work better for you?

JOE

12:20 I'm looking at my calendar up here. Let me...

JOE

12:27 You, are you thinking about this week or next week or, what's your schedule look?

BRIAN

12:32 Let me see what we get here. So I could do.

BRIAN

12:37 Something like you guys are Eastern Time, right?

JOE

12:40 Central...

BRIAN

12:41 Central? Okay. Let me see who you'd be with there.

JOE

12:42 Yep.

JOE

12:44 Yeah. So it's 10 o'clock here.

BRIAN

12:47 Okay. So I could do headquarters for you guys is in Oklahoma City.

JOE

12:53 Calm city.

BRIAN

12:54 Okay. So, you would be with?

BRIAN

13:00 Okay. So, it's just gonna be around Robin there. Okay? So I could do something this week, maybe like Thursday at like one PM, if that works with you or maybe two PM.

JOE

13:10 Okay.

JOE

13:12 How about two PM?

BRIAN

13:15 Yeah, I could definitely do two. Okay. So what I'll do is I'll just send you over a calendar invite for that. It'll have a Zoom link in there. It looks like I'll set you up with a break grip. This one of our it ms, our territory managers. It might change just, I have to figure out who's next in the round Robin system that we have here, but.

JOE

13:17 Okay.

JOE

13:22 Okay.

JOE

13:34 Okay.

BRIAN

13:35 But I'll send that over in just a moment. It'll have a Zoom link in there, but could you just do me a favor and click accept or yes on that just so I know it got you.

JOE

13:42 Sure. Yeah, absolutely. Yeah. Because what?

BRIAN

13:43 Awesome. And is there anybody else that, you would want me to send this invite over to that you would want to have eyes on this?

--- *Paper process* ---

JOE

13:52 I'll what I'll tell you let me find out on that day, because what I'll probably do is have a plant supervisor or dispatcher and our...

JOE

14:02 Billing the clerk sit in on because she does all the invoicing, get their cause, wanna get, you know, I want their input on it for sure. So, so, yeah. So let me check with.

BRIAN

14:05 Okay.

BRIAN

14:08 Sure.

BRIAN

14:12 Yeah, definitely. Definitely. Okay. Yeah. And what you can do, I'll do is I'll send that over and then you can attach or add whatever e-mail you would like to that.

--- *Paper process ends* ---

BRIAN

14:20 So you, you'll have access to that, but perfect. I'll get that sent over to you. And then since it's Tuesday, I might just send you over a quick e-mail tomorrow just to

make sure nothing came up, and everything's still good to go. But yeah, looking forward, to speaking some more with you, on Thursday then.

JOE

14:21 Okay. Yeah. Okay.

JOE

14:36 Okay. Sounds good. All right. Thanks.

BRIAN

14:37 Awesome. We'll try. I appreciate your time. I hope you have a great day. All right. Thanks. Bye.

JOE

14:40 Okay. Thank you. Bye bye.

The End