



Call with Rick James

Quinton Stallings with HVAC PRECISION SVC INC
Recorded on 3/10/23 via SalesLoft, 8 min.

Participants

SERVICETRADE

Quinton Stallings
Territory Manager

HVAC PRECISION SVC INC

John Wilmoth

Rick James

OTHER

Phone Caller #1

Topics

| | |
|-------------------------|------|
| <i>Call Setup</i> | 0:00 |
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| <i>Wrap-up</i> | 6:49 |

Transcript

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

--- Call Setup ---

PHONE CALLER #1

0:00 Morning?

QUINTON

0:01 Good morning. I was looking to speak with John wilmet, please.

PHONE CALLER #1

0:04 Okay. May ask this calling?

QUINTON

0:06 Yeah, it's Quinton installing from service trade.

PHONE CALLER #1

0:09 Okay. Hold on for me.

QUINTON

0:10 Thank you.

PHONE CALLER #1

0:38 John, speaking. May I help you?

QUINTON

0:41 Hey, John. Good morning. It's Quinton stalling from service trade. How are you doing?

PHONE CALLER #1

0:44 Hey, how are you doing? How are you doing this morning?

QUINTON

0:46 I'm doing fantastic. It's Friday, the weather's it's pretty rainy here in Raleigh, but where are you guys located at?

--- Small Talk ---

PHONE CALLER #1

0:53 We're we're up in gaithersburg right in the DC metro area.

QUINTON

0:57 Okay, cool.

PHONE CALLER #1

0:58 In Maryland. I'm sorry, sir, but.

QUINTON

1:01 Gotcha. My fiance is from Maryland. She's from a town called. What was the Frederick? Yeah, she's actually right next to me. Cool. Well, I was reaching out because I spoke with Justin about your conversation and setting up a follow up demonstration, and I wanted to see if you guys had some time next week to schedule that?

PHONE CALLER #1

1:08 Yeah, yeah.

--- Small Talk ends ---

PHONE CALLER #1

1:22 Whatever your first opportunity is, we're gonna try to grab. We've in all, honestly. We lost a little momentum. I think we're caught up with.

QUINTON

1:26 Go...

PHONE CALLER #1

1:32 Just so some of the, everything from he runs the accounting side over here. So we're approaching our year end and all of that. So I think he got a little bit buried. We lost a little momentum. So we're trying to pick this back up. I mean, the guy we're down, you're one of three who we'd be selecting, who we're moving forward with. So we're trying to get the second tier presentations done as your, to do those as quickly as we can in hopes that we can, we're still chasing a spring ahead of a spring with some little buffer time for an implementation. So those will all be questions you might be prepared for that if you're doing the presentation because it's all going to be the questions on the tail end of saying... all other things, you know, we may end up, you know, the product versus the, you know, I'm gonna say that's a smaller piece of it. We're not gonna make a, I don't wanna make a rash decision to go with a second tier selection because of the timing. But if all things are equal and they're very little difference, then if we were, if we ended up at the end of the day going okay of these two guys as who were really with, who are we? Where is the preference? And there's minimal difference and there's a time benefit that could come into play.

QUINTON

1:41 Huh.

QUINTON

1:50 Okay.

QUINTON

2:10 Yeah.

QUINTON

2:37 Right.

QUINTON

2:43 And for spring, as far as a month and spring, what are you guys thinking about to start that implementation?

PHONE CALLER #1

2:52 To start, well, the start would be, we would like to get it. Our thoughts are, if we can get the decision done is to get the implementation as early as possible so that we have the potential to have some time to get everyone acclimated before our world changes come or a weekend. And we, at that point we need to be run, we need to be able to run at that point, not really walk. So we need to have a little bit of time to work through that. So it's gonna on our part would be, we would be looking for aggressive scheduling?

QUINTON

3:06 Right.

QUINTON

3:20 Okay. And what were the two other softwares that you guys were looking at?

PHONE CALLER #1

3:26 BuildOps and FieldEdge, or?

QUINTON

3:31 Are you guys leaning one way or the other right now? Do you guys have a top choice?

PHONE CALLER #1

3:36 No, I think we went through the first ran with a lot of guys. We went through a number of other companies that got stopped mid presentation and said we're clearly not where this is not being perceived as a match. And we, you know, we kind of bailed out and went a different, you know, just said cut it off and went, we're just not

a match. And respectfully, we'll honor your time and ours and cut it off here. So of the three that you guys are really more geared to being to facilitate the commercial side, a lot of the others were built for residential that they were trying to adapt for commercial application. So it just missed too many of the basic pieces of our needs. So.

QUINTON

3:56 Huh.

QUINTON

4:12 Right, got.

PHONE CALLER #1

4:14 So, at this point, it's still a level playing field there's...

PHONE CALLER #1

4:20 You know, that I think the reality is we're going to take it down. The idea is to dig a little bit deeper dive into the software so we can experience things like customer setups, contract setups, working through a service call from, you know, the call maintenance agreements, but going back and saying.

PHONE CALLER #1

4:43 Running a service call through from inception.

PHONE CALLER #1

4:47 Process maybe. So, with some variations in there and completely in through in a billing cycle, the, what is the, you know, to go in a little bit deeper and just make sure we're clear on the.

PHONE CALLER #1

5:00 The technician interface... to kind of revisit all of that and go fresh. And here's, to be honest, we looked at somebody present tations in the early part. We were all looked at each other and I was the first one throw it out and just go. Hey, I'm afraid that I have now overlapped information between because I've seen too much. So, part of it is a refresher. We kind of at the end of each one, we rolled ones in and out nailed down. We really the three you guys are who we landed back with. And it was a matter of quite frankly the presentation is also a refresher for us. Let's go back and make sure that this is the product that we were all, you know, envisioned because I started looking at one aspect and somebody go know that was this other one and I went, but we're in a bad spot... but here's the idea. So at the end of the, at the end of the day, it's worth making that dive. You guys are, you know, final three, you know, there's nobody else bringing brought into the mix. Our selection is coming from within this group.

QUINTON

5:02 Huh.

QUINTON

5:31 Right.

QUINTON

5:52 Got it. Got it. Okay. Well, this sounds great. Who all would be on that next follow up demo?

PHONE CALLER #1

5:57 We're probably Becca is a new service coordinator. She's just getting involved and so we're getting her up to speed and she's going to be one of the key people in the key user. I'm gonna say and organize her on this for us on a day to day basis. But so it's gonna be Rick be involved math.

QUINTON

6:12 Okay.

QUINTON

6:19 Four o'clock...

PHONE CALLER #1

6:19 It's gonna be Becca Lee, Marin, Barker, and myself and Sarah buzzard. So it, I think it's probably everybody in the same group. Becca is going to be the new edition.

QUINTON

6:31 Okay. Got it. Well. Cool. What time? Let's see. I said first available. Let me see what we got going on.

--- *Wrap-up* ---

QUINTON

6:49 How about... Tuesday at? Are you guys Eastern Time? Correct? Yep? Okay. Tuesday at 10 30. Would that work?

PHONE CALLER #1

6:52 Yeah.

PHONE CALLER #1

6:59 That is for one day. That is bad because I know Mike and I have three appointments out of the office. Let me just see here.

QUINTON

7:06 About a Monday at one 30... the thirteenth?

PHONE CALLER #1

7:13 Okay. Let's do Monday at one 30?

QUINTON

7:15 Okay, perfect. I will go ahead and shoot that invite out now. And should I just put your email on there?

PHONE CALLER #1

7:21 Yeah. You go put it to mind for right now and I'll share it with the group and confirm that everybody's you know, at this point, we're probably going to go with whoever is available. We're just, but we'll go ahead and move forward.

QUINTON

7:33 Okay, fantastic. Well, I appreciate the time and I'll send that invite out now and I'll give you a call Monday morning just to make sure one 30 still works for everybody.

PHONE CALLER #1

7:43 Okay, perfect.

QUINTON

7:45 Awesome. Well, have a great weekend. We'll talk then. Yeah, thank you. Bye.

PHONE CALLER #1

7:47 All right, Quinn. Thank you. Bye.

The End