



Volunteer Mechanical & ServiceTrade Consultation

Joseph Summerell with Volunteer Mechanical
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Participants

SERVICETRADE

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OTHER

18652302325

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Transcript

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

JOSEPH

0:00 He, is this Chris?

18652302325

0:02 It is sorry. I'm having to go off my telephone. I know something going on with my computer.

JOSEPH

0:07 No worries. How are you been?

18652302325

0:11 Good man. How are you? Okay?

JOSEPH

0:14 Complain. I've been at a conference out in Florida the beginning of the week. And so I'm down here. I got a couple of more meetings and flying home tomorrow. So better weather than the Carolina.

18652302325

0:24 Yeah. You didn't, you weren't in strago, right?

JOSEPH

0:32 I was not, no... you said straga?

18652302325

0:40 Chicago for a HR, Ashley left?

JOSEPH

0:43 No, I, you said straga, I wasn't quite sure what that was. Yeah, no, I don't...

18652302325

0:47 Sorry?

JOSEPH

0:48 Didn't get up there to the cold... but I heard there were, some are snowstorms around the time you were up there.

18652302325

0:59 We got publed here in east Tennessee right before we left about 12 inches of snow and it stuck around for about seven days.

JOSEPH

1:07 So that's fun for a little while days is a lot.

18652302325

1:12 Yeah. I think we went on a six day stretch where we didn't get above 20 degrees outside.

JOSEPH

1:17 Yeah. Wait.

18652302325

1:22 So, good precursor for Chicago because it's about the same weather there, so.

JOSEPH

1:29 I bet you, we're busy getting heating calls.

18652302325

1:35 Yeah, frozen pop calls as well. Had a lot of frozen mechanical pops and things of that nature.

JOSEPH

1:43 Yeah, absolutely. Well, I got a little bit of background on kinda what's been going on there, but I wanted to catch up today and hear from you about kind of when you all are gonna get back in the swing of things of looking at software and diving into them.

18652302325

2:02 Yeah. So, I saw a couple of your people up in Chicago and talk to them and told them that we'd be having this Zoom meeting. I know if they in and everything or not. But... yeah. So we have a new control.

JOSEPH

2:22 Roller now rest set of as I'm hoping.

18652302325

2:26 Because our biggest issue is not just your all software but pretty much all of them has been the kind of two things... either the dispatch board be on like a schedule so where we do like commercial work and some of our maintenances could take like a month, kind of a pain in the butt to have to just keep moving those time slots.

--- Accounting integrations ---

18652302325

3:57 So we'd like to kind of stay away from that. And I thought when we had looked at ServiceTrade in the past we were able to do that. I'm high up on ServiceTrade. It's probably my favorite program that we looked at. But outside of that, everybody runs into counting. We've got accounting issues, with these products. But I'm hoping with the addition of Susanne, our new controller in kimberly's retiring that she'll look at it with a fresh set of eyes and, you know, be more understanding, or feel like the process works for her.

JOSEPH

3:39 Right. Because if I remember correctly, the issue with there that Kimberly had with us was it wasn't that we couldn't get her the information she wanted. It's that it was moving to a different reporting tool rather than being right inside Quickbooks where she was used to it.

18652302325

4:01 Okay. So, I don't know enough about the accounting side of our company to say yes that's true or no. It wasn't true or whatever because we... yeah, I don't know. I honestly don't understand the hang up if everything talks to Quickbooks.

--- Accounting integrations ends ---

JOSEPH

4:26 Yeah.

18652302325

4:26 That's why I'm hoping what Suzanne, that whenever we go back down and I kinda told her she just started with us about a month ago, but I told her like, hey, this is one thing that's gonna be put on you in time. So, what I was telling the guy that set up this meeting which I didn't kind of called, he's like, hey, I just wondering if you're gonna be, a HR is like, well, can we set up a quick chat, you know, that's fine, whatever. But I told him like we're not going to even look at anything probably until Susanne at least gets a summer under her belt and sees the chaos, and gets, you know, problems with her side or she's trying to correct things like I want her to have a grasp on what it is that we do and what the advantages are of quick which she's worked with Quickbooks for 17 years.

--- Accounting integrations ---

18652302325

5:22 She's very familiar sexually teaching us some stuff. But, you know, what's the advantage or the disadvantage of going to a new platform? The way it talks to Quickbooks, so on and so forth because I think we're going to use Quickbooks forever. But... the question is, how do these softwares talk to Quickbooks?

--- Accounting integrations ends ---

18652302325

5:47 And here's to see if she has the same issues that can really add or not. But I don't want to throw her into that right now. I mean, she's only been working with us for four weeks, so I wanna see the crazy side of our industry which is the summer before we ever start going down that road again.

JOSEPH

6:06 Yeah, she needs the experience to see what it's like. But also like going into a new company. There's probably, some small changes that she'll be looking to make some quicker wins... that I imagine she'll want to knock a couple of those out before pulling out the entire operations side of things.

--- Purchase decision ---

18652302325

6:26 Right. Yeah, I don't want to too much at her once. I mean, right now, you know, it's because she is so new, tell her you all hung in the moon and she's like, yeah, it's great. You know, I wanted to actually look at it from a standpoint of okay, this makes sense or this doesn't make sense?

JOSEPH

6:45 Right. You want to her opinion not just feel like she was told what to do.

18652302325

6:51 Right. Cool. Right?

JOSEPH

6:55 Well...

18652302325

6:55 That's basically where I'm at.

JOSEPH

6:59 What would be useful? Is there anything that'd be useful from our end between now and the fall when you really start to focus on this?

18652302325

7:17 Yeah. Nothing I can think of. I don't... yeah, nothing I can think of. So probably what I'm gonna do like I said is let her get... through the summer. Let us get back in the fall and slow down. And then probably what I'm gonna do is reach out to you, do a demo.

--- Purchase decision ends ---

JOSEPH

7:41 Okay.

18652302325

7:43 You know, either a Zoom or whatever did, are you the one that came down?

JOSEPH

7:48 No, I was a.

18652302325

7:50 You're in the Carolina, we actually.

JOSEPH

7:52 Yeah, I'm from rali, but I came over one time to you all's office.

18652302325

7:59 I did. Okay. Yeah. So I knew somebody did. I can't remember who it was... but yeah.

--- Purchase decision ---

18652302325

8:08 So the, we don't necessarily have to go that far right off the bat... but maybe set up like, a Zoom, or something where we can kind of start talking about the process and how it works and everything like that. And then we gonna let her do that with a couple like, you know, probably you all. And maybe I have to go back through my role and see who those, the options were. But there's a couple that the group all kind of liked you're one of them and I think there was maybe one or two more. I'm probably going to schedule her to do that kind of with all you all and let her decide like, yes, bring server straight in for, you know, a deeper look, or whatever. And, and I do think you all passed the bar because in my opinion, you'll have the best product for me and my side of things. It's just the accounting side of things that's a little bit of the issue right now.

JOSEPH

9:08 Yeah. Well... yeah. So if we're thinking well, you wanna not wait too long into the fall to really start evaluating because if this is something that you want to make a decision on and then try and roll out by next spring so that you're ready for next summer.

JOSEPH

9:33 Really is something you'd probably want to decide on maybe september, october, that way we could get started in maybe december.

18652302325

9:42 That is kind of my, that is kind that is kind of my plan is... you're in role, so our september could be cool and dry or it could be 100 degrees. So.

--- Purchase decision ---

JOSEPH

9:56 Yeah, you never.

18652302325

9:57 Got to play that by year, but at least by the first couple of weeks of october, we should be winding down on the crazy service and everybody should have a little more time to sit down and focus on it.

JOSEPH

10:13 Yeah. And then it just becomes a question of how long does the evaluation process take? I've seen some take two weeks and some take a year.

18652302325

10:23 Yeah. Well, the good news is when it comes to like me, Charlie in our office, like we've already seen your product. We've already seen the other products. We know what we like about all of them really like we'll just do probably with us. I'll just be like a general overview with her setting in watching and listening and then let her dive in on the accounting side of things.

--- Purchase decision ends ---

18652302325

10:55 So, you know, the dog and pony show of this is our dispatch board. This is how we do it. Like we should just be able just to touch on those things.

JOSEPH

11:04 And...

18652302325

11:04 Then, you know, maybe like a reminder to everybody.

JOSEPH

11:08 We... I'm excited to go through that again with you all at some point because we've done a lot of updating to it and improvements to the ui and add AI capabilities to it and things like that.

--- Dispatch ---

JOSEPH

11:21 So like now you're scheduled, it can understand what texts are applicable for which jobs and you just press a smart schedule button and it gives you like three options of, hey, this person is the closest they can get it done quickest or this person is the one that typically goes to this location.

--- Dispatch ends ---

JOSEPH

11:38 And the other person kind of like a third option. So little things like, that we've been really pushing the boundaries on.

18652302325

11:50 Yeah. So... I do remember the names of those other groups now. So we got probably who we were most impressed with a three, had you all pro BuildOps.

--- Purchase decision ---

18652302325

12:04 And like I set up, I'm not telling you that for any reason other than this full transparency, we probably will review all three of those again with.

JOSEPH

12:15 Absolutely... because ideally you don't want to be making this decision again for a long time.

18652302325

12:23 That's correct. And we, I mean, we've been chasing this rabbit hole for about five years now. So, I mean, we're to the point where Charlie and I are just kinda tired of it. And that's why we're taking the approach of... let's confirm the accounting softwares. And then we'll wrap back around on what we like deal.

JOSEPH

12:46 Well, I don't know if you'd be interested in it, but we have a user conference.

--- Pricing ---

JOSEPH

12:53 It's usually about 80 percent ServiceTrade users and then 15 to 20 percent prospects, but that is the very beginning of may. It's like... I had it up this morning. Somebody else. Let me see exactly what date it is. April 20 ninth through may first and that's in Austin, Texas... could be.

--- Pricing ends ---

18652302325

13:19 First day we show up, you're gonna take me out.

JOSEPH

13:23 I can do that. We can get down in Austin.

18652302325

13:31 It is about that time for me to recover from Chicago.

JOSEPH

13:34 Do you all get wild up there?

18652302325

13:39 Eight, we saw five o'clock in the morning a couple of times.

JOSEPH

13:43 My lord, is it?

18652302325

13:45 Are open to.

JOSEPH

13:48 Was, is cold, you gotta do something to stay warm?

18652302325

13:52 Yeah, I don't know if you've ever been to the astray events but, and everybody's just whining and dining so... kind of like business for about 10 hours a day. And then it's just a full on party from there.

JOSEPH

14:07 Right... man. Yeah. I, me, I guess it was HR last year in Atlanta. I stayed out way too late one night and Booth hours the next morning came real quick.

18652302325

14:20 Yeah. So that's what I was telling her like we're talking was like, man, Atlanta is probably the safest one to go to. But if you go to like vegas or Chicago.

18652302325

14:35 Along for the ride. Honestly, you're there embodied but not in spirit or mind, right?

JOSEPH

14:41 Right. Lot of fun, a lot as much business happening... maybe it is.

18652302325

14:49 But yeah, if you'll send me some more information on that... no guarantees right now, but maybe I might well be interested in that. Sure.

JOSEPH

15:00 Absolutely. I'll send you some info on it and I think I have a discount code on, the tickets, I can send you as well. But essentially, a lot of what it is folks getting together, talking about how they're using service trade, best practices, but also that's probably half the conference and the other half is a lot of focus on just in general. How do we... make our brands better? What are the things that we're focusing on outside of ServiceTrade? So, while we host the conference and most of the users are our customers, it focuses on a lot.

18652302325

15:35 More things that... okay. Yeah, send me some more information. And probably, so Charlie and I'll talk about it and make a decision on take that leap or not. I mean, it is a weird part of the year for us as far as being busy.

JOSEPH

15:55 Yeah, it's right when all your spring P end it north that way.

18652302325

15:59 It's when we start to ramp up really. Yeah. So, yeah, get that information in front of me as quick as possible and we'll talk about it. Want to venture out there not.

JOSEPH

16:12 Cool. Well, yeah, I'll send over to you.

--- Purchase decision ---

18652302325

16:14 For then it would.

JOSEPH

16:19 Yeah, 20 ninth through the first. So that is... Monday to Wednesday. I.

18652302325

16:32 Okay. Yeah, just send that over to me whatever information you got. We'll talk about that.

JOSEPH

16:41 Sounds like a plan. Now, if I think of the interesting things to be thinking about new stuff coming out, I'll just kinda keep, a slow drip of that sort of stuff coming at you. And then we'll get a real deep dive demo scheduled towards the end of the summer.

--- Purchase decision ends ---

18652302325

16:58 Sure. I have brother. I appreciate it.

JOSEPH

17:00 Yes, sir. You have a great afternoon.

18652302325

17:03 Come in, you too. Thank you.

JOSEPH

17:05 Bye.

The End