Call with Control Systems 21 - Mike Cherewka

Chris Resta with Control Systems 21
Recorded on 12/18/23 via SalesLoft, 19 min.

Participants

SERVICETRADE

Chris Resta
Associate NorthBoundary Account Executive

CONTROL SYSTEMS 21

Mike Cherewka

Topics

Transcript

MIKE

0:00 Control systems 21, this is Mike.

CHRIS

0:02 Hey, Mike, it's Chris rest server ServiceTrade, how you doing today?

MIKE

0:06 All right. How about you?

CHRIS

0:07 I'm good man. Do you have a, you know, a few minutes to kinda talk about, the demo request?

MIKE

0:12 Yeah, absolutely.

CHRIS

0:13 Cool. I figured the phone call would be a little bit easier rather than you trying to, you know, even me trying to get in front of a camera.

--- Purchase decision ---

CHRIS

0:19 But so I saw that you would put in a demo request and just to give you some context. So, my name's Chris rest, I'm one of the SDRS here over at ServiceTrade and we just take this initial time to kinda gather as much information from you as possible, make sure the demo makes sense. And then from there, you know, obviously kinda go through scheduling and figure out a day and time that works from you. But, you know, saw that you'd put in demo requests and was just gonna kinda start off if you want to kinda give me like a breakdown of what you guys do, the type of work and stuff, and then we can go from there if that sounds good.

--- Type of work ---

MIKE

0:49 Yeah, absolutely. Yeah. We're in Pennsylvania. Dillsburg, it's about halfway between gettysburgh and harrisburg.

CHRIS

0:57 Okay.

MIKE

0:58 And yes, we do.

MIKE

1:03 And I'll call it industrial control that's our main thing, but we work with a lot of like municipalities.

MIKE

1:12 Factories, small businesses doing... you know, help with their control side and also kind of maintenance.

--- Type of work ends ---

MIKE

1:18 A calibration for the pump stations is a big one. Anything that's kind of got some type of electrical control going onto it. So, we have kinda three main groups that we deal with. So, we got our call like our engineering team, which the ones like programming controllers or, you know.

CHRIS

1:22 That...

CHRIS

1:39 Okay.

MIKE

1:39 That's kind of on the engineering side. Then we got like our field work with to go in and one's doing trouble calls to these customers. So, hey, this doesn't work. Can you come diagnose and fix it?

CHRIS

1:53 Hey...

MIKE

1:54 Or, hey, we need you guys to, you know, take this stuff.

--- Type of work ---

MIKE

1:57 The engineers just programmed out and install it for us, run wire bracket this stuff to the wall and install pipes, whatever it might be.

CHRIS

2:06 Okay.

MIKE

2:11 And then we got a calibration side where that's for.

CHRIS

2:14 Okay.

MIKE

2:15 Based on the things we talked, we call like our current work or the service agreements to go out on a periodic basis. And, you know, TUNE all the customers equipment to make sure it's still phone properly.

CHRIS

2:20 Nice.

CHRIS

2:29 Okay.

CHRIS

2:32 Yeah. So it seems like the recurring work, I guess the calibration side would be kind of relevant for us with the field work. It's more. It sounds a little bit more reactive customers call in. You guys kinda go out from there.

MIKE

2:42 I...

CHRIS

2:46 But if you guys do.

MIKE

2:46 It's both sides.

--- Paper process ---

MIKE

2:48 Yes, we do. We do work orders for it. So we definitely want to track stuff to it, you know, sometimes we can... plan this out and schedule them ahead of times. I mean, otherwise, we would just want to, you know, open a work order or like a quote

ticket when it happens so the guys can log the time they spent and what materials they use and.

CHRIS

2:50 Okay.

--- *Type of work* ---

CHRIS

3:08 Yeah. Okay. It sounds like it, what would you kinda like if you kinda had to put numbers around the two? Would you say it's about 50 50 or do you think you guys do a little bit more like preventative maintenance? I guess.

MIKE

3:10 We got reactive and planned work with.

MIKE

3:24 I'd say we do definitely more of the field work that trouble caused us?

CHRIS

3:28 Okay.

CHRIS

3:30 All right.

CHRIS

3:33 Do you think like down the road or is that something you guys are trying to get more into the, you know, contracts, preventative maintenance service agreements?

MIKE

3:42 It's it's part of why we're looking to move towards the software instead of a lot of the, you know, pen and paper spreadsheets we're doing now is to really analyze that and see if we should be putting more focus into it.

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

CHRIS

3:55 Okay.

CHRIS

3:59 Makes sense.

CHRIS

4:03 Sorry, I'm just writing all these notes down. So, got down, in Pennsylvania, right? You mentioned Getty work too. I've actually, I got a lot of family up in like jerky. So, I'm not sure how far away that is from you guys.

MIKE

4:05 Yeah. All good.

MIKE

4:09 Yeah.

MIKE

4:16 Syracuse New York. You mean? Okay. Yeah, I mean, seracus from here, we're looking at probably three or four hours.

CHRIS

4:17 Yeah, New York, yep.

CHRIS

4:24 Man. Okay. So, yeah, a little bit of a drive. I also did work. They've got a lot of summer camps up in Pennsylvania, worked in honesdale, Pennsylvania, which really small town, cool town though up there for a few Summers. So kinda familiar with that area, not so much, you know, where you got, but.

MIKE

4:26 Yeah.

MIKE

4:36 Okay.

MIKE

4:41 Yeah. All good. Another thing. I had to have gettysburgh, and all the civil war stuff. And then we're not too far from here. There's a here chocolate?

CHRIS

4:47 Yeah.

CHRIS

4:51 Yep. Familiar with that one too. I spend a few Summers out there, but that's awesome.

CHRIS

4:57 So, I don't do you guys have like technicians? Is that kind of what you would call? I'm not sure if that's the same terminology?

MIKE

5:03 Yep. Yeah, we still come technicians... yeah.

CHRIS

5:05 You do? Okay. Cool. How, how many would you guys have like currently?

MIKE

5:10 We include their managers who try to do at least, you know, kinda three quarters of their time in the field. It's probably 25, 27 people somewhere in that range.

--- Pricing ends ---

CHRIS

5:21 Okay.

CHRIS

5:23 Text. And are you guys still kinda like interviewing or growing in from the technician standpoint, or are you guys just come?

MIKE

5:32 Yeah. I mean, yeah, at this point, we feel like we are restricted in the amount of work we can do by our processes and efficiencies on the office side.

--- Type of work ---

MIKE

5:43 So we're looking to kind of, you know, take, you know, 2024 over the year for us, cleaning that up a lot so that we can look to expand our tech side without having to expand the office as well. That's why we're looking towards a software.

CHRIS

5:43 Huh.

CHRIS

5:53 Yeah. Okay.

--- Paper process ---

CHRIS

5:58 Makes sense.

CHRIS

6:01 And got the work industrial control as far as like as current process, you don't have like a field service management tool in place. It's typical just pen and paper right now.

MIKE

6:11 Yeah. I mean, we're using a bunch of different excel spreadsheets, Microsoft planner, you Google outlook calendar, like all these different pieces?

--- Accounting integrations ---

CHRIS

6:22 Yeah. Okay. I could imagine that can be, you know, definitely kinda cumbersome but as far as like looking at software as far as what you guys are kinda having it, you know?

MIKE

6:27 All right.

MIKE

6:32 Okay.

CHRIS

6:34 Really? What, what you would kinda want out of the software exactly like, you know, if you could kinda talk to me a little bit about that. Like are you guys just kind of data entry or?

MIKE

6:40 Yeah, absolutely.

--- Quote templates ---

MIKE

6:44 Yeah. So we're looking for way to simplify our quoting estimate, whatever you wanna call it, that front end side of it. So we're to streamline that, so consistency repeatability, whether that's templates or copying from existing, you know, pulling materials from a database. So we use the same stuff over and over again.

CHRIS

6:51 No problem.

--- Quote templates ends ---

MIKE

7:08 The work order side, it's really the tracking aspect of giving the guys an easy way to track their time and materials that they use against the correct, you know, work order that they're doing.

CHRIS

7:16 Okay.

MIKE

7:21 So we can look at each piece.

CHRIS

7:23 Yeah.

MIKE

7:25 The recurring work, I mean, it's handled completely offline right now. I guess technically we do have a software for that, but it's not meant for that. It's meant to actually kinda capture the data when they're tuning up the equipment and we use that for scheduling as well. So to have that, you know, a way to see the recurring work kinda really be auto generated, we can put it in the schedule. But now it's coming up work again consistency with a time materials that we're putting towards that.

CHRIS

7:38 Okay.

--- *ST app contracts and pricing* ---

CHRIS

7:54 Okay.

MIKE

7:56 From the financial side of that too, it's you know, tracking how well we're gonna, there's a contract based, and if we see we're continuously exceeding, you know, that kind of losing money or not making a good profit. We know next year we got to raise our prices.

--- *Invoicing* ---

CHRIS

8:12 Yeah.

CHRIS

8:15 Makes sense. How are you guys communicating the like e-mail and stuff with your technicians? Right now? Is that typically how it's done? Like just kind of emails of invoices and stuff?

MIKE

8:21 So we do all our invoice and out of the office. So we use Quickbooks and we'd probably still plan to do that. So if you guys have any integrations there or if you're more built to handle like invoicing from the field like credit card payments.

CHRIS

8:40 Yeah. We, so to answer your question, we do integrate with Quickbooks. And then you can also, you know, technicians can handle that out of the field, if they want up to you guys, do you know what version of Quickbooks you're on? I know there's desktop and online.

MIKE

8:49 Okay. So.

--- Invoicing ends ---

MIKE

8:55 We're doing to stop?

CHRIS

8:56 So, cool.

CHRIS

8:59 But yeah, we can answer or we can, you know, technicians can invoice out in the field as well if you guys want them to, it's totally, you know, up to you guys.

CHRIS

9:09 As far as... like the breakdown of what you guys do?

CHRIS

9:15 I think I was looking on the website. I don't know how up to date the website is. I think it said we provide support service legacy. So you guys also do design and installs as well.

MIKE

9:27 Yep. Yes. So the design is kind of an engineering team I was talking about. So they'll do a lot of work kind of here in our office or we'll call it the shop. So they'll do that kind of front end work here. And then we'll go out and between them and the service team will actually install it at the state. So we, maybe we got somebody expanding a line or doing an upgrade or equipment is 20 years old. So we'll help them with that.

CHRIS

9:29 Okay.

CHRIS

9:48 Yeah. Okay.

--- Type of work ---

CHRIS

9:57 Yeah. Okay. How big would you say the service team is like the dedicated, you know, calibration side, I guess.

MIKE

10:03 Yeah. So the calibration guys is, I think about four or five and our kind of service team is the majority of it guys out in the field?

MIKE

10:16 So that's probably.

--- Type of work ends ---

MIKE

10:20 Let's see. I have a number somewhere.

MIKE

10:25 I mean, for rough numbers, let's say they're like 15.

CHRIS

10:29 Okay.

MIKE

10:30 And then the rest would be the engineering side.

CHRIS

10:32 Yeah. Okay. Makes sense. Cool. But, yeah, everything you mentioned seems like, you know, we can definitely do simplify and quoting, you know, estimating the front end stuff, templates, pulling materials... you know, from database. Are you guys just using like excel for that database for like materials and stuff?

--- Accounting integrations ---

MIKE

10:49 Right now, we have it all in our Quickbooks and just trying to remember what we called it in there or exporting the list and seeing this data is useful enough?

CHRIS

10:56 Yeah. Okay.

CHRIS

11:01 Okay.

MIKE

11:03 And then do you guys do kind of scheduling and I guess also like time sheets, time entry as well?

--- Tech On-site ---

CHRIS

11:10 Yeah. So you can do scheduling and you can also track their time and the technicians can also let the customer know like, hey, I'm on the way, I'm in route, I've arrived, you know, they can let the customer know.

MIKE

11:23 Okay.

CHRIS

11:24 As far as that goes, but yeah, any other kind of questions for me? I know I just kinda threw a bunch at you.

--- Tech time tracking ---

MIKE

11:31 I know one big one. We've worried about the, I've looked at with the time. Like do you guys rely on a clock in clock out or do you allow more of a traditional time sheet? We can just enter the numbers?

CHRIS

11:42 That's a good question. I don't know that one directly.

--- Tech time tracking ends ---

CHRIS

11:49 That would only be something for the, it. M, and I can, I wrote it down here so they know... I wanna say it's up to you, but I wouldn't take my full word on that.

MIKE

11:49 Okay.

MIKE

11:59 Yeah. All good.

CHRIS

12:02 But, yeah, I know they can have the choice of, you know, o'clock, at eight o'clock and I just don't know if it's kinda set in stone or if you guys can change it.

MIKE

12:09 All right. Yeah, set a big because a lot of these are based on that and our guys aren't used to that. Putting in a new software is enough of a change. We don't want to introduce that as well.

CHRIS

12:13 Understandable.

CHRIS

12:25 Yeah, but I'll let the, itm know, and then get back to you on that... as far as the demo goes. Is there a good time that you were thinking would work best for you?

MIKE

12:36 So, I don't know what it's like for a lot of people, but I am around most of the time in between the holidays like, you know, this week is very open for me next week. I'm off Monday, Tuesday, but that I'm pretty open as well, so I can be flexible.

CHRIS

12:51 Okay, cool. Yeah, it's pretty much with us as well. I mean, if you've got time this week, we could definitely... knock it out. You guys are Eastern Time to.

MIKE

12:59 Sure.

MIKE

13:01 Yep.

CHRIS

13:04 Looks like Griffith would be the, it that you're sitting down.

CHRIS

13:16 Yeah. Okay. And then it's a discovery call. Yeah. Okay. So, with you guys at, you know, 25 to 27 texts, we would schedule this as like a discovery call. So basically, it's just kinda gathering more information from you, but you're meeting with somebody that's a little, you know, deals with the tool on a daily basis.

MIKE

13:35 Huh.

CHRIS

13:37 So, let me see who that would be.

CHRIS

13:42 Chris kidwell would be the field rep.

CHRIS

13:47 There we go. Okay? And you're on Eastern Time, right? I know Pennsylvania is, but I cool.

MIKE

13:52 Yes, yeah.

CHRIS

13:55 Yeah. This week is looking pretty good. Is there like a lighter day on your end that you're thinking would work, you know, better for you?

MIKE

14:00 Other than Friday morning, it is wide open right now.

CHRIS

14:08 Okay. Cool.

CHRIS

14:11 So, we could shoot for, you know, tomorrow at like 11 am or do you prefer to kinda do it early morning mid afternoon, late afternoon?

MIKE

14:18 No, that's perfect. We can do tomorrow at 11.

CHRIS

14:21 Okay. Cool. Let's go ahead and plan for that. I'll let Chris kid well know the discovery call. We book for 45 minutes? It really shouldn't run over that.

MIKE

14:31 Okay.

CHRIS

14:32 So, I will send you the calendar invite and I think I had your e-mail from the website. Is it the same one that you want me to use? I think it was.

MIKE

14:41 Yeah, that's the one yep.

CHRIS

14:42 Yeah, at control systems 21. Okay, cool. And then Mike, is there anybody else you want me to add in on the calendar invite?

--- Purchase decision ---

MIKE

14:52 No, I think that covers all come with. I'll refresh kind of my list of things available to check with Chris on, but we'll let him kinda take the reins too, and.

MIKE

15:04 See what it looks like. So, we've been shopping around a bunch. I haven't found one that kinda completely locked us in and I happen to stumble upon you guys today.

CHRIS

15:05 So...

CHRIS

15:13 Wow. Okay.

CHRIS

15:16 Yeah, I know, the demo is going through, you know, a bunch of software demos can be a lot. So, out of curiosity, is there any like any kind of particular softwares that you guys are looking at? Do you like so far?

MIKE

15:27 So, the two best ones we've seen so far are BuildOps and service box.

--- Accounting integrations ---

CHRIS

15:34 Okay. BuildOps, I'm familiar with service box. I've never heard of.

MIKE

15:38 Okay.

MIKE

15:41 Yeah. And then, yeah, we rolled out a bunch like blue folder ServiceFusion FieldEdge.

CHRIS

15:41 But, yeah.

CHRIS

15:50 Yeah.

MIKE

15:54 I'm sure. Lots of names you guys hear about in the same space?

CHRIS

15:59 Yep. Ones we hear on a daily basis.

--- Purchase decision ---

CHRIS

16:02 But, yeah, awesome. And I'll let Chris know what you mentioned as far as like worried about the time clock in clock out if we can do, you know, another way, I know you said that was kind of a big piece for you guys? Really? The last question I had for you, Mike would be like as far as timeline goes as, or like, you know, are you guys trying to get this up and running as soon as possible or do you guys have like a set in stone kind of timeline that you're thinking when you'd like to be live?

MIKE

16:12 Yeah.

MIKE

16:22 Yeah. I mean, yeah, originally, we thought we're going to have it made last week and yeah, because we got pretty far with BuildOps, but I haven't closed it yet.

--- Purchase decision ends ---

MIKE

16:33 So that's why I kinda refresh looking at stuff this morning when I came in and you guys were a new one that popped up in the wrong search terms before and stuff on the website looks promising.

--- Implementation and ongoing support ---

MIKE

16:45 So gonna reach out, see at least how, you know, demo looks. We'll kinda go from there. But yeah, we're looking to get moving quick at least on a decision and I'm sure you guys are like everyone else where there's some type of customization or configuration. So there's a definite ramp up phase.

CHRIS

16:43 Yeah.

CHRIS

17:02 Yeah, typically takes 30 to 60 days to get, you know, up and running to five. So.

MIKE

17:08 Yeah, no problem.

--- Implementation and ongoing support ends ---

CHRIS

17:11 Cool. Awesome. Meanwhile, I'll take Chris kid well now and, you know, Mike, I appreciate your time and fill me in on where you guys are at and, you know, really looking forward to showing you how it works tomorrow. And, you know, if you do kinda think of anything, I know I kinda put you on the spot with some of those questions. But if you think of anything else you want to run by me or Chris, let me know and I can definitely get those answers for you.

MIKE

17:31 Yeah, we'll do. Yeah, I see at least see the e-mail invite. So, and depending on how my day goes, I can put together a punch list that will help you guys out with just how you tail stuff.

CHRIS

17:32 That's...

CHRIS

17:41 Cool.

--- Purchase decision ---

CHRIS

17:42 Yeah, that be actually really crucial for Chris just to show you exactly what's going to be relevant. And then we just kinda kill, you know.

CHRIS

17:51 You know, make it as tailored as possible for you and a lot of the things that you were telling me, you know, obviously kinda wrote down, I'll give to him hand over to him as well. So I'll let him kinda take the reins like you're saying?

--- Purchase decision ends ---

MIKE

18:02 Yeah. All right. Yeah, I should be able to get you guys something there. So that'll help make it more productive for you guys too.

CHRIS

18:05 Cool.

CHRIS

18:08 Yeah, no worries. And I've already got what I have which is obviously super helpful. So, you know, do what you can, no, no, no worries if you can't but yeah, yeah, man, appreciate the time. And did you see that calendar invite come through?

MIKE

18:19 Yep. Already got it. So we're good.

CHRIS

18:20 Nice. Awesome. Sweet. Well, let me know if you've got any other questions, you know, I can definitely assist you there, but, yeah, appreciate Tom today and, we'll talk to you tomorrow man.

MIKE

18:29 All right. Thanks so much Chris.

CHRIS

18:31 All right. Take care.

The End