



# Call with Jason Leboeuf

Alec Ashby with Steadfast Electric  
Recorded on 3/21/23 via SalesLoft, 11 min.

## Participants

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

### **STEADFAST ELECTRIC**

Jason Leboeuf

# Topics

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# Transcript

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

JASON

0:00 Hi, Jason.

ALEC

0:01 Hey, Jason. This is Alec. How are you?

JASON

0:04 I'm good. How are you doing?

ALEC

0:05 Doing good. Doing good. How was your weekend, man?

JASON

0:08 Man. I have no complaint... pretty low key. Nothing big.

ALEC

0:13 Yeah, I try to keep it lucky sometimes too. So I get that. Yeah, I know we had this call scheduled. I know you had to have internal review with your team. So just want to touch base to see how those discussions went. And then we can kinda go from there.

JASON

0:30 Yeah. So here here's, kind of my take. I mean, I like your product, but we're probably. So with our business mix, I mean, I think, I don't see an kind of where we're headed being like a really like full commercial. I think we're gonna be doing quite a bit of residence. I think we're going to be probably 50 50. And then you couple that with the fact that... new Construction is and will maintain a pretty good chunk of our business even as our service business grows. I think right now we're kinda looking at, you know, maybe going a different direction just because of that because of business mix, you know, it kinda looking at some products that might have, whereas you're geared really, you know, towards the service dispatch side on commercial. I think we're looking at some stuff that may have a kind of a strong project management with.

JASON

1:30 I'll call it... maybe not as quite a robust service dispatch as what you guys offer, but something that's pretty good that will manage what we do especially on the

residential side, kinda give us something that's a little.

JASON

1:45 I don't know that it has to be quite as sophisticated on that side as yours. So that's kinda where I'm leaning.

ALEC

1:53 Okay. Yeah. So it seems like new Construction is kind of been a bigger priority since the last time we met. And then you guys kinda came to the assumption that platform is gonna hold a little bit more weight than maybe your service platform. Is that fair to say?

JASON

2:09 That's fair to say. I mean, for the next and, you know, who knows what, you know, five years brings, but I would say at least with the next several years that's kinda where we're at because that was that's where we got our foothold in and it's really been a, it's really been a pretty dynamic growth in that part for us. And although I think service will be rapid growth for us, you know, when you start really small rapid growth, you know, we will, we'll still be service will still be playing catch up on our new Construction side even though we've got dedicated folks to that now. I think new Construction, we still have to support what is.

JASON

2:49 A big part of our business... now. So I'll tell you kinda, we've got some meetings with Sage intact this week.

JASON

2:58 You know, and kinda go through their product from an accounting standpoint, and possibly from their project management side and see so kind of what we decide there could have some impact on kind of which way we go into the dispatch. Like if we saw their product and said, okay, yeah, we really feel good about their accounting system and their project management. Then maybe that would kinda open us to maybe a little bit different route on the dispatch side. But I think until we kinda get through their demos, which are we got a couple of days this week, we're seeing their stuff. So.

JASON

3:33 It may be, we kinda have to reevaluate once we see that, but as of right now, I think I'm looking at a product that probably has a little bit more project management... way to it, but also does the dispatch.

ALEC

3:49 Okay.

ALEC

3:52 Yeah, because like you can definitely, you know, go out and get an all in one platform. You know, there's definitely still some out there. Although those aren't as popular anymore. The only problem with that is that a lot of companies using SSO or some kind of service module with these bigger ERP, you know, really their bulk of their business is accounting or, you know, project management and service is kind of an afterthought and something they just requested. So, you know, customer engagement or, you know, sending out quotes quicker or, you know, having something that's a little bit more than just, you know, you're running the mail service department is important. I definitely think you should go in some kind of direction with a service specific software. But if service is kind of an afterthought for you, then I mean, obviously, that makes sense. The only thing is, though is that, you know, a lot of people with this economic climate right now, they want to have a really good service department because services, you know, there's always going to be a need for service. A new Construction can always come and go.

JASON

4:00 Yeah.

JASON

4:51 Sure.

JASON

4:54 Yeah, no, I get that was my previous life. So we were, we did both... in the plumbing, heating and air world, mainly a plumbing world. So, yeah, I definitely get that. So I guess what that said? I mean, I'm not saying I've made a final decision. I just kinda giving you where we're leaning. We have... a couple of products we're looking at in a little more depth this week, the Sage being one and then the BuildOps being another.

JASON

5:23 So that's kind of where we're at. I mean, I don't mind maybe giving you a call back later in the week or shoot you an email, kinda give you a little bit more feedback on once we've seen some products where we're leaning that's if that's cool before we schedule anything.

ALEC

5:38 Yeah. Yeah. That's totally fine. You can definitely do that. And then as far as, you know, your residential concerns, is that just mainly like the flat rate pricing or because we do have some clients that do, you know, residential on our platform? Is there anything else that you're kinda looking for that side that maybe you don't have?

JASON

5:58 Not really.

--- Pricing ---

JASON

6:01 I mean, obviously, I mean flat rate. I think at some point in the residential world, I mean, you know, the market is kinda geared towards some flat rate. What I was in the plumbing world. We also use the flat rate. I mean, we use the flat rate across the board, both residential and light commercial. So I don't know in the electrical world, I don't know enough about the market. I mean, I've guys that works for me that know a little bit more of it right now. I couldn't tell you if I think that, you know, when the type of light duty commercial that we're going to be focused on is flat rate works there like it didn't plumbing. So I'm still kinda learning that, but I mean, there there is some interest on my part to be able to do flat rate.

ALEC

6:40 Okay.

JASON

6:46 You know... I guess I'm more of a hybrid, you know, like you take service tighten which is kinda throwing everything at flat rate using, you know, using a predetermined catalog. I don't I think our business will be a little bit more variable than that. We could maybe like a.

--- Pricing ends ---

JASON

7:07 Catalog might be a little too generic for us, but I do like the fact that there could be, you know, some catalog type stuff like pre programmed in. So... I'm kinda weighing both out, you know.

ALEC

7:26 Okay. Okay. Got you. Well, yeah, it seems like you're still kinda, you know, figuring out what the priorities are, as well as looking at other products... now, as far as BuildOps, you know, that's a pretty robust project management software. To my knowledge. I mean, they do service, but their for test kind of projects.

--- Wrap-up ---

ALEC

7:46 And then you're obviously already pretty familiar with titans since you use them at a different company. So what about this? Jason?

--- Wrap-up ends ---

JASON

7:32 Yeah.

--- Wrap-up ---

JASON

7:43 Yeah.

JASON

7:50 Yeah.

ALEC

7:56 You could, you know, give me an email this week or see how those meetings go. If I don't hear from you this week, I might send you an email like or a call either Monday or Tuesday, and then we can just kinda go from there. Does that sound like a point to you?

JASON

8:00 Sure.

JASON

8:08 Yeah. Yeah. You've got my cell, feel free to reach out any time and but yeah, I think we should keep in touch over the next week.

ALEC

8:14 Okay. Okay. And.

ALEC

8:18 Okay. Yeah. I can just, you know, I mean, if that's the case, I mean, I could just give you a call Friday afternoon. Would that work?

JASON

8:23 Yeah. Yeah. Absolutely. That's perfectly fine.

ALEC

8:25 Okay.

ALEC

8:28 And then if, you know, if we're gonna keep the conversation after that, would this be something where Chad would need to see it or what would kinda be the steps from there?

JASON

8:34 Yeah. So, so my plan is, you know, we're kinda doing like once it's kinda seeing everything. And if I'm like, okay guys, you know, I think we should go this route with an ERP and a service dedicated dispatch, then I would definitely get...

JASON

8:53 My controller, Jason and Chad really involved in the next steps.

ALEC

8:59 Okay. Gotcha.

ALEC

9:02 Yeah, because, you know, we do, I don't know about those other platforms but we do have a native integration with Sage intact. So, you know, Jason would probably need to speak with our Sage expert. And then Chad could just speak to me because I'm not the RP guy over here, but I could definitely talk with Chad and, you know, keep it brief because I know last time you said that we wanna make sure he's in the field as much as possible. So I'm more than happy to do that as well.

JASON

9:31 Yeah. And so we're kinda twofold we're also just determining if we wanna make a jump to Sage intact or if we want to stick with the Quickbooks online so that's kinda the other that's kind of our other and we wanna make these decisions, you know... while we're at a size where it's more manageable to make these conversions. So that's kind of a twofold thing. But yeah, let's plan on speaking on Friday. I think I'll probably know a little bit more on by the.

ALEC

10:00 Okay, cool. I'll give you a call sometime Friday afternoon as far as what you just said, I mean, like the thing, I always think, you know, the customers aren't good, you know, regardless of what direction you go in, the customers aren't gonna see your Quickbooks. They're not gonna see your impact now, not to say that isn't important, but it just kinda depends on, you know, I think, you know, upgrading whether it's us or someone else, what your customers see or what your customers are engaging in might be a little bit more important than the accounting system, but at the same time, I understand, you know, setting a good Foundation while you can, this is my two cents on that. But yeah, Jason, I'll just touch base with you Friday and then we'll just go from there.

JASON

10:32 Yeah.

JASON

10:43 Okay. That sounds good.

ALEC

10:45 Alright, cool. Well, thanks for your time, Jason, you have a good one. Okay?

JASON

10:47 I...

*The End*