



# **ServiceTrade/Prime Mechanical - Follow Up Call**

Quinton Stallings with Prime Mechanical Service Inc  
Recorded on 2/22/21 via Custom Import 1, 17 min.

## **Participants**

### **SERVICE TRADE**

Quinton Stallings  
*Territory Manager*

### **OTHER**

Phone Caller #2

Phone Caller #1

# Topics

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# Transcript

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

*--- Call Setup ---*

PHONE CALLER #1

0:00 Hi, Clinton. Hello, Lauren in a while. Hey... Phil... Phil might be muted... quote and I think we've been on the phone for the past three hours. Yeah.

PHONE CALLER #1

0:22 That's why I was so lonely last week because you are like here's a fun vacation and I was like, who am I gonna talk to you about all this stuff I'm doing? I'm serious. I felt like I was gone for like a week and a half. It's a thing. Hey, Shane.

PHONE CALLER #2

0:38 Hi. How are you?

PHONE CALLER #1

0:40 Good. How are you?

PHONE CALLER #2

0:41 Hi. How's it going good? How's it going... going good? One sec? Sorry, I share an office with Suzanne. So... yeah, she'll probably over here, it anyway.

PHONE CALLER #1

0:56 Hello?

PHONE CALLER #2

0:57 So, unfortunately shows stuck in a meeting, but she did say she had no questions. I think she's pretty satisfied with... with everything. I'm not sure I'll fill. It looks like those aren't too. So.

*--- Call Setup ends ---*

PHONE CALLER #1

1:13 Is being client?

PHONE CALLER #2

1:15 What's that?

PHONE CALLER #1

1:16 He's being quiet, he's muted.

PHONE CALLER #2

1:18 Yeah, he, like, he doesn't like to... jump in. So just to go over the quotes... to quotes.

PHONE CALLER #1

1:30 It up on my screen so we can also... or is it, it's right here's? The one here's, the one I... I think you guys should go with?

PHONE CALLER #2

1:41 Hi, this is the one with no partsledger...

PHONE CALLER #1

1:44 Correct. Yeah.

PHONE CALLER #2

1:46 Okay. So question I have is service time card that's a separate fee obviously.

PHONE CALLER #1

1:55 It is, yeah, because it's like it's a separate products. Well, that's part of service trade, it's just something that some people want. And some people don't and for what we talked with Cheryl about, we, you guys definitely need it.

PHONE CALLER #2

2:10 Okay. So, how does remind me how that works with, within the system?

PHONE CALLER #1

2:17 Yeah, the...

PHONE CALLER #2

2:18 Guys have their mobile device. They clock in and out of a job. It tracks their time and then what happens from there again, the time card.

PHONE CALLER #1

2:27 So, the time card right here, they can log into it and it basically shows all of their clocking in and out for the entire week in this one time card and you can see it sort of... of accumulates all the time and adds it up. So, actually the week you've got your total... total time from all those clock events and it includes like onsite and route and things like that.

PHONE CALLER #2

2:55 And so show can run a report for each technician and each report will look like this.

PHONE CALLER #1

3:01 You will. So this would be the technician actually pulls this up and they say, yep this all looks correct based on my schedule from the week, they can check this box and say... this is... this is... this is right. And then it submits directly to Cheryl and the actual time card looks like, well, I don't know. Hang on. I gotta open it up. It actually looks like.

PHONE CALLER #1

3:34 And it... it basically would say time card o'clock, events for this technician here's, all the job numbers here's, the location. And then it's got all the totals and everything. And for like lunch breaks that your technicians have to take. What... what we simply suggest is just create like a location with your company's address and maybe just simply call it lunch or like lunch break or admin lunch or whatever you wanna call it, populate the... the time that they've spent taking lunch every day too.

--- Pricing ---

PHONE CALLER #2

4:05 I see. Okay. And then, so then that report is generated for each technician and then they can take those and run the payroll with it, correct? Okay... okay. And so that's just 108 dollars a year per user.

PHONE CALLER #1

4:27 Yeah, it's like nine dollars a month per technician.

PHONE CALLER #2

4:30 Okay. And so obviously, as we had technicians, we had that cost.

PHONE CALLER #1

4:37 That's right. What we do is if you add technicians, we'll just prorate them. So they stay on the same billing cycle. What... what I will say about that those, we... we do like quarterly audits of your account. So if you need to like add somebody, you don't have to wait on us to do that. It's really easy to just add them into your system. And then if we notice the actual number of technicians differs from what, what's on the agreement... will just... will just send you like a pro rated invoice.

PHONE CALLER #2

5:08 I see. Okay.

PHONE CALLER #2

5:14 Let's see the discount. And then, so the second page is the implementation fee, basically getting everything set up and running.

PHONE CALLER #1

5:23 Yeah, that's right?

PHONE CALLER #2

5:25 And remind me there's no, there won't be any additional fees for upgrade or updates and that kind of thing or friends and... you know, cause or service that we need from you guys text support or whatever?

PHONE CALLER #1

5:43 That's right? So it's...

PHONE CALLER #2

5:44 All included in the price?

PHONE CALLER #1

5:45 That's right with this, you would get the 24 seven support through like our support frontline, the... the like phone line, the email, and then even through like the ticketing system in app, and that's not... not an extra fee. Now, what that doesn't really include is if there's like something special, you want us to like code for you or something like that?

PHONE CALLER #2

6:09 Like a special setup or something?

PHONE CALLER #1

6:11 Yeah. Our... our T and I'm rate for stuff like that is 149 an hour. I think I usually, we put two hours of professional services. I recommended six for your maintenance checklist. So we've got the resources to... to make sure that we're giving you enough time to put those into your service trade account. I can't remember how many you said you have though, so.

PHONE CALLER #2

6:37 Technicians...

PHONE CALLER #1

6:38 No, as far as like actual like reports you would want in.

PHONE CALLER #2

6:44 I see what you mean? Yeah.

PHONE CALLER #1

6:45 Yeah. So that's what... that's what this is the.

PHONE CALLER #2

6:48 Up to figure that out. Okay, that's what that covers there. Okay. Now... now... now you're gonna want... I guess it comes out to 22,600... that'll be a one time one payment. Is there any other terms that you guys offer or is it, are you eastern, what would...

PHONE CALLER #1

7:17 Be your preference?

PHONE CALLER #2

7:20 It'll be nice to have a monthly payment. I mean, that would be ideal, but... that way we're not coming up with a big chunk at once?

PHONE CALLER #1

7:31 Yeah. What we... we generally don't do monthly, but I could ask and see if we could do quarterly payments. Would that work for you?

PHONE CALLER #2

7:40 Yeah, that would be better probably than... than one big chunk at the moment. Yeah.

PHONE CALLER #1

7:46 Let me do this. So generally, the... the services payment, we take half upon signing. And then when we split it up, we do have upon signing and then half at the end of the service delivery windows. So if we split that in half, that would be five zero, 94 divided by two. And then we divided 17,017 five six divided by four.

PHONE CALLER #2

8:20 100...

PHONE CALLER #1

8:21 Yeah. The first... the first two payments would be about seven K and then the last two payments would be about 4,400.

PHONE CALLER #2

8:36 Okay.

PHONE CALLER #1

8:39 Does that work with your budget and your sort of cash flow?

PHONE CALLER #2

8:43 I gotta... I gotta discuss that with John.

PHONE CALLER #1

8:45 Okay.

PHONE CALLER #2

8:46 Yeah. The money part of it's... not... not my... not my job.

PHONE CALLER #1

8:51 Yeah. You talk with him on Friday. How did that conversation go?

PHONE CALLER #2

8:57 We briefly discussed it. He... he had some meetings and we just didn't have a lot of time to sit down. We're hoping and even today, it's been kinda crazy. I'm hoping to get some time with them tomorrow. Wednesday. We have our normal Wednesday meeting. So a lot of it I think will be discussed on Wednesday when we have the management team together. And... so I just wanna make sure I have all my notes here. So when they ask questions.

PHONE CALLER #1

9:26 I can... I can send you an updated version of this with quarterly payments on it. Like I would basically just list out with the payment schedule would be right here.

PHONE CALLER #2

9:36 Yeah, that would be great. Yeah, that would do is, I know that's going to be a question for sure.

PHONE CALLER #1

9:41 Splitting it up into smaller chunks. Is it easier for you guys to do that via credit card? Or would you prefer checks either way's? It doesn't matter to me.

PHONE CALLER #2

9:52 I'm not sure.

PHONE CALLER #1

9:54 Okay. If.

PHONE CALLER #2

9:55 We, if we know we're paying every quarter, then we can budget for it.

PHONE CALLER #1

10:01 Yeah.



PHONE CALLER #2

10:01 So, I'm not sure how John would want to and, you know, our accounts payable people.

PHONE CALLER #1

10:07 Sure. I'll just do it. What I'll do is I'll make it a credit card payment since it's below 10 K per... per transaction since that's generally the threshold for where we're like we like a check... yeah, the processing fees. So I'll... I'll rewrite it to include that. And then... I think I can get approval for that quarterly payment, but to extend through Friday. So I'll... I'll make sure to ask my boss that.

PHONE CALLER #2

10:37 Okay. Yeah, if you could, if you could. And then... no, I just, I need to talk to Cheryl and... and my team and see how important having the po system part of this.

--- Pricing ends ---

PHONE CALLER #2

10:53 Your recommendation is not to have partsledger in there.

PHONE CALLER #1

10:57 Yeah, that's... that's what I would say the start and... and that's for two reasons. One is you want to get you if you want to get live before summer, which is already pretty ambitious, but it can... it can be done if you want to get live before summer. I think adding partsledger to your implementation is not gonna set you up for success because that's... that's like all whole different beast and it requires like I'm gonna come in when we can and do all this inventory. Like... it's just... it's just... it's just a lot to consume and like two two, three months.

PHONE CALLER #2

11:35 We don't have really any inventory in the search by as needed?

PHONE CALLER #1

11:40 Yeah, that was sort of the second part is you guys already don't... don't do inventory and, you know, the parts purchasing that you do. You're already kind of doing sort of... of manually. So I don't think service trade is gonna make that harder, right? And I think you might find that without the parts purchasing piece, you can, there's like ways you can just use the job number is the po and... and workarounds like that. I think you'll find as you start using service trade, you may not even need partsledger, so I... I hesitate to start people with it because a lot of times they'll just, they'll figure out that they don't actually need it. And then you're not paying for something you're not getting value out of.

PHONE CALLER #2

12:23 Okay. Got it. Okay. That answers that question.

PHONE CALLER #2

12:33 Do you have any questions? Sorry... sorry, I was on the phone?

PHONE CALLER #2

12:41 I think that pretty much covers it. So, like I said, it'll be getting with John. Hopefully it's today tomorrow... Wednesday. We'll have the meeting and well, I think we'll have an, I do where we're going after Wednesday so I can check back with you. Probably Thursday.

PHONE CALLER #1

13:02 Yeah. I, if I pull up my calendar door... I actually surprisingly have some slots open Thursday. Do you wanna try to regroup around 10 pacific?

--- Pricing ---

PHONE CALLER #2

13:19 I have another meeting 10. Okay. I have a meeting at one 30 and a meeting at two 30. I could probably do maybe 11 30. Do you have anything in?

PHONE CALLER #1

13:33 Cool. When does that? I'm free kind? Have I can skip the meeting that's on for that time? So, yeah, I could do 11 30.

PHONE CALLER #2

13:45 Okay. Yeah, I think we'll know... we'll know which way we're going at 11 30 on Thursday. What's...

PHONE CALLER #1

13:53 Option?

PHONE CALLER #2

13:55 I'm sorry?

PHONE CALLER #1

13:56 What's the other option you're concerned?

PHONE CALLER #2

14:00 The other company?

PHONE CALLER #1

14:01 Yeah.

PHONE CALLER #2

14:03 We're looking at BuildOps?

PHONE CALLER #1

14:05 That's right? Hey, did you that reminds me, did you talk to me those references we provided or are you planning to do that?

--- Pricing ends ---

PHONE CALLER #2

14:12 I have not yet, but yeah, I wanted to have it on my list of things to do today. Hopefully I can get to.

PHONE CALLER #1

14:18 Yeah.

PHONE CALLER #2

14:19 One of them is in pleasanton here nearby.

PHONE CALLER #1

14:22 Yeah. And they, they're not a competitor. They're fire life safety contractor, and...

PHONE CALLER #2

14:28 Yeah.

PHONE CALLER #1

14:28 No, they're... they're so great because they... they have done such an amazing job of like leveraging service trade to sell more like in its is help their service business grow. Like when they started, they only had like five service technicians and now they're up to probably about 15 or so and they, but they don't have to grow that much to... to get more out of their customers like they're just... they're just selling their existing customers more. So they're... they're great... great use case to talk to. And then the folks down in, let me see if I can find... the folks down and Glen Dale... reset. I actually talked with them on Friday, Nick row. Hand. He has built this thing. It's... it's unbelievable what he's built because they don't use the service time card. It's kind of a long story why, but they don't use the service type card. He actually built his own time card, which I told him. I said, can I just sell this please? Because it's like really cool because he, it like uses the service trade clock events to like flag things, but... but they've had some... they've... they've had some experiences with time tracking and stuff and... and use the data and service trade to help with their payroll. So they'd be good... good people to talk to you about that kind of.

--- Wrap-up ---

PHONE CALLER #2

15:56 Okay. Alright. Yeah, I'll try to hit them up to, yeah.

PHONE CALLER #1

16:01 And then of course, these people use Quickbooks Crawford. So I thought they'd be good to talk to you too.

PHONE CALLER #2

16:07 Okay. Alright. Yeah.

PHONE CALLER #2

16:14 Let's see what else hopefully I can get a couple of these people in today.

PHONE CALLER #1

16:17 Yeah... cool. Well, I'll put, I'll add everybody and then Quinton, I'll ID to just in case if you're meeting doesn't show up, and then I'll send you an invite for Thursday at 11 30. Okay, cool. Well done. And then I'll send the updated pricing as well. And if you think of any questions between now and your meeting with John on Wednesday, just let us know.

PHONE CALLER #2

16:44 We'll do very good.

PHONE CALLER #1

16:46 Hello? Alright. Yeah. Thank you guys. We'll...

PHONE CALLER #2

16:49 Okay. Okay... okay. Thank you.

PHONE CALLER #1

16:52 Bye, bye bye.

*The End*