



# Milly & Joseph | ServiceTrade Planning Call

Joseph Summerell with Crete Mechanical  
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## Participants

### **SERVICE**TRADE

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# Transcript

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

MILLY

0:00 Hello?

JOSEPH

0:01 Hey, how are things?

MILLY

0:02 Good. How are you?

JOSEPH

0:04 I'm doing well. It's been a while. How's your summer been?

MILLY

0:08 Bugging? Hard?

JOSEPH

0:10 Too. Foggy?

MILLY

0:12 I mean, it's like 103 degrees here.

JOSEPH

0:15 Yeah. You're down in Texas, aren't you?

MILLY

0:17 Yes, it's horrible.

JOSEPH

0:18 Yeah. Well, hopefully it lets up soon.

MILLY

0:23 Yeah, yeah.

JOSEPH

0:26 Not at least not for another month.

MILLY

0:29 Like October.

JOSEPH

0:34 Right. God, that's brutal. Have you gotten to travel at all this summer?

MILLY

0:38 For fun now, for work? Yeah, I went to Louisiana, a small town in Louisiana and then we're in Denver hot place. Yeah. Okay. But Louisiana does have amazing food.

JOSEPH

0:54 Very true. Yeah, I, last time I was down there, I stayed an extra day pass work stuff just to be a fat ass and eat for a while.

MILLY

1:04 So good at the best bride chicken that I've ever had. And it was like not New Orleans. It was a small town in northeast Louisiana like sorta near Mississippi and it was this abandoned like it was a old looking like building that they completely like renovated in this, like downtown that was just like there was nothing really there. Cool. It was like this cool restaurant in the middle of nowhere.

JOSEPH

1:34 I hit one of those completely opposite vibe yesterday, but I was in high point and there's this chicken restaurant there. Best fried chicken. I think I've ever had in my life, but it is in a gas station and the absolute hood of high point North Carolina. But every time I'm there, I have to stop.

--- Purchase decision ---

MILLY

1:51 That makes sense for it to me. Good.

JOSEPH

1:53 That's right. Well, I wanted to just take a few minutes to catch up since it's been a while so that I can kinda prepare for next week. Okay? First of all, kinda like who all is going to be on that demo? Is it all service managers?

--- Purchase decision ends ---

MILLY

2:11 Yeah. Basically, it's our partners, some of the partners that have like more service related work as opposed to Construction, but yeah, generally, I think most of them are on manager level?

JOSEPH

2:23 Okay. And do you wanna share a list of those with me? So I can add them to the invite or do you want me to just send you the invite and you can forward it around?

MILLY

2:30 I can send you?

JOSEPH

2:35 Okay. Yes, that'll work. Either one works for me. I just, it's just good to know when I'm creating, the actual event which I'll do right after this. I just wanted to talk to you beforehand.

MILLY

2:47 I think there's like eight people on and I don't know, I don't know why, but we didn't discuss the like cost the subscription fees with the partners that are going to be looking at this. So they're just kinda, I don't know why that's what they decided that they didn't want to share it. They wanted them to just like see the product, see if it is gonna be like worth it. Like is it doesn't have everything that you need or want and then they were going to like drop the price on.

JOSEPH

3:20 Okay. So, is it still us versus BuildOps or are there any other competitors that are in the mix now?

MILLY

3:25 No, there's no other there's no that integrates with spectrum easily.

JOSEPH

3:32 Gotcha. Cool. Have you seen? Is there a full on integration built out there? Because we've had some folks that have kinda gotten stuck in implementation and then bailed on that because they couldn't actually carry out that integration.

MILLY

3:44 With build ups from as far as I know, it's definitely built out.

JOSEPH

3:52 Okay. Interesting. Cool. Well, yeah, it's something to dig in on. And, if you all are lean in that direction, I definitely wanna connect you with some folks before you make that decision. But hopefully we can win you over, run our own merit. Yeah.

MILLY

4:08 I mean, it's really not at this point. I guess it was us like determining whether we wanted to show like have this demonstrated to the partners, like to their service team to see if it's like an actual need. I mean, because... we're implementing and we get

cold and like complaints or support, you know, calls, any help, this isn't working, and it's all like a lot of it is work for service related.

--- Purchase decision ---

MILLY

4:33 And so we're trying to find a solution that would work for them. But ultimately, it's gonna be sort put in their hands as to like what they're excited about or, what would work? And then the pricing part as well. So.

JOSEPH

4:45 Yeah. Okay.

MILLY

4:46 They're feedback in, I'd say?

JOSEPH

4:49 Their feedback is?

MILLY

4:50 What their like the service managers feedback is going to be very important to our decision.

JOSEPH

4:57 Okay. Gotcha. So what is that? At least to my next question of like what is the remainder of that decision making process really look like?

MILLY

5:05 I mean, it's basically after they look at both service trade and BuildOps then like then a decision would be made soon after.

JOSEPH

5:16 Okay. And would that be the still the same plan of doing one company first or whoever raises their hand and says, hey, I want to hop on this train?

MILLY

5:24 Probably whoever is like volunteers first. Okay? And like, well, like they wanna do it, and it makes sense for us to do it like we probably are not gonna start with, a big company like the big.

--- Purchase decision ends ---

JOSEPH

5:38 Like AC corporation in greensborough, probably not the one to start with.

MILLY

5:41 No, no.

JOSEPH

5:43 Yeah. Okay. And so, that time line is this, I guess we have our meeting next week. Do you have one scheduled with BuildOps?

MILLY

5:54 Yeah, I know.

JOSEPH

5:55 Yeah, next week as well. And so, is this something that will probably be decided on the following week or in the next month or so? What would you think?

MILLY

6:03 I would assume by the end of August, there would be a decision made?

JOSEPH

6:08 Okay. And who is the one that kinda would like finalize and sign that sort of agreement that?

MILLY

6:15 No, that would be, I mean, I assume that's gonna be... I don't even know. I judejose is Joe and I boss, but it's also service related. So, maybe somebody on our operations team or maybe our CEO.

JOSEPH

6:35 I don't know. Okay. So the reason I ask that is sometimes right at the end, whoever is signing, it kinda has to restart the whole process because they're like hold on. I have to sign this. What is this? So I wanna make sure that we're thinking ahead of that.

MILLY

6:52 Yeah. Let me talk to Dominic and ask Dominic on the service like operation side.

JOSEPH

6:57 Okay. Because if they need to be a part of that meeting next week, it might be smart.

MILLY

7:03 Have to repeat yourself over and over again. And sorry, this as well. This is, I don't know if you remember, Dominic, he's the Irish guy.

--- Purchase decision ---

MILLY

7:10 I don't know this was his idea to like have the partners. I'm like can't they just watch the recording and.

JOSEPH

7:17 I'm happy to repeat things because we also have new stuff that has come out over the summer that I wanna like make sure that we highlight and it's good to kinda have a good fresh reset on that you only listen so well to a recording versus somebody you can actually talk to.

--- Purchase decision ends ---

MILLY

7:32 Actually ask questions and stuff that are specific to you.

JOSEPH

7:41 So, the plan is still to do a pilot or a phase one from there, the rollout process. Would it be to multiple companies or would it be just still stagger first company, second company, third kind of on down the line?

--- Type of work ---

MILLY

7:56 Probably stagger until like we have... for, I mean, because it's going to be my department or like management information systems department. We're already like have backlog of, I think there's like 10 companies that still need to get onto spectrum. So it's either going to be like in conjunction with those like to see if they're heavy service and do them at the same time.

--- Type of work ends ---

MILLY

8:20 Like you're doing service trade and your learning spectrum at the same time. I don't know if we thought all the way through on exactly how that's gonna look, but I'd say at first it would be staggered out just because of like resources like availability.

JOSEPH

8:38 Yeah. Okay. Awesome. Well, that kinda wraps up all this stuff.

--- Access to information ---

JOSEPH



8:41 I needed to wrap my head around for the kind of like the larger deal. And then I have a couple of questions on really technical stuff to cover in the demo.

MILLY

8:53 And do you show the app?

JOSEPH

8:54 As well? Yeah, I'll go through the full mobile app, if you want me to. I generally do.

*--- Parts management (purchase orders) ---*

MILLY

9:01 Yeah, that'll be.

JOSEPH

9:04 Cool.

MILLY

9:05 Wait, sorry. Did you have other questions you said? Yes?

JOSEPH

9:08 Yeah. So you said you wanted to cover POS? Like what about POS? Do you really want to cover? Because when we had initially talked about is letting spectrum still cut those POS and then just communicating that over to reflect in service trade?

MILLY

9:25 Okay. So you'll can't create a po in your app?

JOSEPH

9:32 We can, we can do it either way.

MILLY

9:35 But, okay, I think is a way man way, but they were going to start thinking about using the POS, right?

JOSEPH

9:46 Right, right. So we can go do it one way or another, depending on what you want the workflow to be and where you want, the guard rails to be within your organization.

*--- Parts management (purchase orders) ends ---*

MILLY

9:57 And I would need to be standardized across all partners.

JOSEPH

10:04 That's a great question. I don't know, likely, yes.

MILLY

10:14 I feel like we would probably want to create them like have the ability to create them from the app and, or portal and then like sync it into spectrum. Okay?

JOSEPH

10:27 And I can, yeah, I can cover some of that tomorrow or not tomorrow next week? Then there was some stuff on like maintenance proposals, getting those set up and all that we really haven't covered too much. How are you all generating maintenance proposals now and going out, getting them sold? What's that process?

*--- Accounting integrations ---*

MILLY

10:50 I mean, I think they're doing it in either excel or if they have an estimating software that's what they're doing, definitely not in spectrum. So.

JOSEPH

11:00 Well, I'll briefly touch on that because we have like we have our whole, we have a suite of like five different softwares, one of which is called Northboundary, which was built by the guy who built link corporations selling software.

*--- Customer engagement (quoting and invoicing) ---*

JOSEPH

11:14 And so, what it does essentially is it's a great way to scan in all the equipment to put in the condition of it. And then you can just click a button and it'll spit out a proposal based on as raid data that can be sent over for online signature.

*--- Invoicing ---*

JOSEPH

11:28 And then we can take all that information and just push it into service trade with the customer, the location, the asset details, and, the service intervals. So you can really go seamlessly from getting a contract signed to setting it up.

MILLY

11:44 Like it just sinks over. So like you're okay.

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

JOSEPH

11:47 There's a, there's a button you press when you close one of the contract that's like a separate product that's priced per salesperson. And I can steer clear of that, but it's if it's...

MILLY

11:58 The, about the price on the call. But I wouldn't want to know that probably.

JOSEPH

12:04 You would wanna see that.

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

MILLY

12:06 I mean, would be called a.

JOSEPH

12:09 And that's something that like certain partners could opt into other don't have to because it's all just a per user basis and you can have different offices setup for it.

MILLY

12:20 Okay. I kinda wanna make note of that real quick.

JOSEPH

12:27 That's an acquisition we made end of last year. And so first two quarters of this year, Northboundary... first two quarters of this year, we're really just building out a lot of the basics of that integration and better understanding what we had bought. But it's kind of just a great way to sell it's. Project and maintenance proposals that's all that. It does some light CRM stuff.

MILLY

12:52 Okay.

--- *Pricing* ---

MILLY

13:04 You...

JOSEPH

13:04 Know if all your partners are harvesting, say what?

MILLY

13:07 Is that monthly me?

JOSEPH

13:09 Yeah, it's 99 dollars a sales user a month.

MILLY

13:15 So...

JOSEPH

13:16 Unlimited access on the admins?

MILLY

13:18 Be it'll, be making this add up the?

JOSEPH

13:24 All going to be adding up the checks once you start using it, right?

--- Pricing ends ---

MILLY

13:28 That's fine. That would be the hope. I guess. Yeah. What were you gonna ask?  
Sorry?

JOSEPH

13:34 The, when people are selling maintenance proposals now, are they capturing all of the model, make model serial number at the beginning of like before the contract is even signed or is that all done by the technician?

MILLY

13:50 Some of them are?

JOSEPH

13:52 Okay. Well, I'll dig into a little bit of that with, the folks on our call just kinda asking about those processes at the beginning because sometimes it helps to think through, hey, what are you doing now and all right, this is how it would go in service trade. So, some are doing it one way. Some are not kinda all over the place.

--- Forms ---

MILLY

14:12 I would say, yeah.

JOSEPH

14:14 Okay. Cool. And, are there different like sets of tasking for different contracts? You, do you do like custom tasking for this hospital versus another hospital?

MILLY

14:28 I don't know the answer to that question. I'm gonna assume. Yeah, but I don't know for sure.

JOSEPH

14:33 Okay. I can ask that next week as well. And one of the things you said to focus on was reporting that's a pretty broad.

*--- Tech time tracking ---*

MILLY

14:43 Dominic, okay. Not mine.

JOSEPH

14:46 Well, you send it to me?

MILLY

14:49 Late should tell me how labor gets over again. Again, we download and import, do.

JOSEPH

14:58 Yeah. So you're looking at reporting for time entry?

MILLY

15:02 Yeah.

JOSEPH

15:04 Yeah. So labor can either be entered via our labor items. So you can say, hey, I put two hours for this job on this day and then your time card can look at service trade for the week or whatever sort of time frame you want. It will compile that all into a digital time card where you can say, yes, this looks good. It kicks over to a manager for approval and then it compiles into a CSV or excel file to be uploaded into the payroll system.

MILLY

15:32 Okay.

JOSEPH

15:32 That's using labor items. We can also use clock events or a combination of the two. So clocking in and out and then take that time and throw it on the time card.

--- Recurring maintenance ---

MILLY

15:40 Okay. Yeah. So maybe... just like labor and then also work or reports?

JOSEPH

15:55 Like work order contract profitability, that sort of thing. Hey, how do we look at how this customer is doing as a whole, that sort of.

MILLY

16:03 Yeah.

JOSEPH

16:03 Yeah. Okay.

MILLY

16:05 Or if you could like service location and, or customers.

JOSEPH

16:11 Yeah, we have a couple of ways that, we can roll it up here. I can show you what I was thinking. So this is like a job profitability report. So, these are our offices. This is what create could look at for all of your different subsidiaries. And then underneath that, you can see the company and location they're doing work for, and you can roll all these up so I can look at all of my offices.

--- Recurring maintenance ends ---

JOSEPH

16:39 This will take a second to update all the data, but it can show you kinda like the margins for your different offices. And then if I look at I'll shoot or mark service solutions is losing a lot of money. Where are they losing money? You can then look at the different companies that they're doing work for, and then the locations and then the job type and you can sort this out and arrange it however you want. But it's all very dynamic reporting.

JOSEPH

17:10 Is that the kind of stuff that you think they'd be looking for?

MILLY

17:13 Yeah. And that's easy to look at too.

JOSEPH

17:17 Yeah, we're trying to make it as simple as possible. And then like contract profitability, you can build in logic so that it lights up certain colors if you need... if it needs extra attention.

MILLY

17:30 Gotcha.

JOSEPH

17:32 Cool. Yeah. I'll make sure to go through all that, how I typically would for a mechanical contractor. And if there are questions, we can dive deeper into certain pieces of it.

MILLY

17:41 Yeah. Joe. Ask like 45 questions per minute.

JOSEPH

17:47 That's fine. That's what that's why we're here.

MILLY

17:51 I'm sure they'll be good question.

MILLY

17:57 Let me send you a list of who needs to be invited.

JOSEPH

18:03 Okay. So you said, the partners are going to have a huge... or most of, the power in the decision making process from the corporate level. What are the main things that you all are looking at? That question might not have made any sense?

MILLY

18:30 Yeah. Say that again.

JOSEPH

18:32 Like, the partners are going to be looking at the functionality of it of like, hey, this is gonna work for us or not, and then give their suggestions but from the corporate level, what are the main decision making criteria that you're you all are evaluating?

MILLY

18:47 I mean, stupidly, like my biggest thing would be the integration between what it's gonna be like with service trade and spectrum and then either being able to troubleshoot through any errors that pop up easily. Like, I know drawing a blank. I

swear, I'm normally good with names and quick at like, but what was her name? The way?

JOSEPH

19:13 Carol.

MILLY

19:15 Carol, yes, she, I think, I believe she said yes, like the support is really good.

JOSEPH

19:22 Good. Yeah.

MILLY

19:25 So, I guess for me, it would be how easy is it to implement? And what does the integration look like? Like, how many sinking issues are there? Really? Like how difficult is that to get through? And you don't really know that until you're in the project like doing it, I guess.

JOSEPH

19:44 Yup. Okay. Yeah, that's one of the things I had written down was simplicity of onboarding because as you all are growing, making it simple to just rinse and repeat the onboarding process is pretty critical.

MILLY

19:58 I don't like we still haven't really seen the integration. So I just don't know like the push.

JOSEPH

20:06 They weren't able to show it to you.

MILLY

20:09 I mean, I think it was because we were like asking a ton of questions and they were answering that we didn't get to that point. I mean, I'd have to, there was a lot of fun there. Joe was on the call and Dominic a lot.

*--- Accounting integrations ---*

JOSEPH

20:24 That's kinda why we connect you with it because, we can answer a lot of, the technical questions. They can answer more of the real world experience stuff. But they were the ones that I'd be able to show you the actual integration.

MILLY

20:36 Okay. So.



JOSEPH

20:38 Because we can't really get into their system and show it... because I don't have a set.

MILLY

20:45 Softwares you'll integrate with any others?

JOSEPH

20:49 Yeah, all the big ones, I mean, vista GP, intact, Sage, 301 100 Quickbooks, NetSuite. We have customers all over the place.

MILLY

21:05 And so, like for you, I don't know or does anybody on your team like know like the INS and outs of any of those softwares?

JOSEPH

21:16 Yeah. So a mixture of the, a mixture of both there. So we have a couple of folks who come from like accounting PM, backgrounds, helping people get onto those accounting systems and they're kind of our integration people who help build out those integrations for some of them and others, they just kind of work with our partners who build out those integrations kinda depends on if we have expertise with that specific accounting system or not... like intact.

*--- Accounting integrations ends ---*

JOSEPH

21:47 We have a native integration there because Tania, who I think you've met at some point, she used to sell intact and knows it inside and out. Then something like NetSuite, we don't have anybody internally that knows it really well, but we have a partner who we now have probably 20 different companies live using that integration and we work with them all the time. I text them on a regular basis. If I have any questions on something.

MILLY

22:14 Is he like a consultant for NetSuite or? Okay? Cool?

JOSEPH

22:21 Yeah. So yeah, we have, I mean with our open API, if it can communicate, then, we can send data to it. Okay? Awesome.

MILLY

22:35 Have any other questions?

JOSEPH

22:37 That really covers what I needed, to ask you and I think it sets me up better, for next week's demo. So I appreciate your time.

MILLY

22:45 Yeah. Sorry, if I can answer everything. I'll send you, the people.

JOSEPH

22:50 Perfect. Yeah, I'll send an actual invite out. So creates office is in Tampa, right? Will folks be there? Like would it be useful for me to be there for this demo?

MILLY

23:04 All...

JOSEPH

23:05 Right. That's that's what I thought from last time.

MILLY

23:10 Eventually can go to Florida if you want to.

JOSEPH

23:14 Yeah. I just had a customer in portorico, go live. So I'm trying to finagle my way into a onsite visit down there.

MILLY

23:21 That, yeah.

JOSEPH

23:22 But I'm gonna wait until like December, so it's a nice break from the cold.

MILLY

23:27 Yeah.

JOSEPH

23:32 Awesome. Well, I won't take up any more time. I really appreciate it. We'll see you next week if you have any questions between now and then don't be a stranger.

MILLY

23:41 All right. Thank you. Appreciate it.

JOSEPH

23:42 Absolutely. We'll talk soon, right? But.

*The End*