



Call with <Unknown> - Rick James

Will Sherksnas with HVAC PRECISION SVC INC
Recorded on 1/4/23 via SalesLoft, 12 min.

Participants

SERVICETRADE

Will Sherksnas
SDR

HVAC PRECISION SVC INC

Rick James

Topics

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Transcript

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--- Call Setup ---

RICK

0:00 Good morning, Tracy.

WILL

0:01 I was looking for Rick James.

RICK

0:03 Sure, math, who is calling?

WILL

0:04 Yeah, this is will with ServiceTrade?

RICK

0:07 With whom I'm sir.

WILL

0:08 Service trade. He filled out a demo request form. I was just trying to follow up with him to see that.

RICK

0:14 Okay. No problem. I'm sorry, can you repeat your first name again? Well, got it. All right. One moment, please?

WILL

0:16 It's will.

WILL

0:19 Thanks.

RICK

0:43 Hello, Rick.

WILL

0:44 Hey, Rick, my name's will, how are you doing? I'm doing great. Hey, I'm just reaching out from service trade. I received the demo request form that you filled out the other day. Just wanted to, yeah, I just wanted to follow up with you here and trying to get that scheduled for you. It's a good time to speak with you.

RICK

0:46 I'm good. How are you doing?

RICK

0:55 Yes, sir.

RICK

1:00 Okay.

--- Call Setup ends ---

RICK

1:03 Yeah, absolutely.

WILL

1:05 Awesome. Awesome. Yeah. So you guys are?

WILL

1:10 In the hvac industry, are you guys doing mainly commercial for your type of work or?

RICK

1:15 We, we only, do. Yeah, we only do commercial.

WILL

1:19 Okay. Gotcha. Because, yeah, we're built more specifically for like the commercial and industrial. So, desk definitely just wanted to make sure you guys weren't you know, kind of majorly residential.

RICK

1:30 No, I.

WILL

1:32 Gotcha. Okay. Perfect. And what do you guys currently have in place over there? Is it just like pen and paper processes still, or?

RICK

1:38 It's not that bad, but it's pretty close. Yeah, we have a system that we built internally over the years. It's a file maker, program file maker is like a database like access or whatever.

WILL

1:43 No.

RICK

1:56 And we've you know, we built it probably literally like 25 years ago, and then we've changed it and added it deleted and it's just not a good system anymore.

RICK

2:08 So, that's how we've been running the service department. We have just quickly, we have a service department, and then we also have hvac Construction and a plumbing Construction.

RICK

2:21 So, our biggest problem right now is the service part of it. So that's what we're focusing on. But if, you know, if the system is more encompassing that's fine at some point, but right now we're just trying to get the service billing.

RICK

2:35 More streamlined.

WILL

2:37 Gotcha. So, the biggest thing for you guys is streamlining the billing process.

RICK

2:41 Yes, yes.

WILL

2:44 Okay.

RICK

2:46 I mean, I'm sure you get dispatch and all the other stuff and that's fine. We don't have right now. We don't have that many texts we have about 10.

WILL

2:53 Yeah, that's totally fine.

RICK

2:55 But, but quite honestly, the ability of our software is holding us back because the people in the office are spending so much time processing the billing that we can't

increase the number of tack we could, if we had a better system and.

WILL

3:12 Yeah. Yeah, that invoicing and that billing time, if, yeah, if that's holding you back then.

RICK

3:16 Yeah, yeah.

WILL

3:18 Perfect. Well, let me pull up my calendar here and see what we've got available for you. Are you more available in the mornings or afternoons for those demos?

RICK

3:27 Afternoons are probably better cause morning is kinda the busy time we're getting everybody sat bit.

--- Call Setup ---

WILL

3:36 Afternoons are a little bit better. All right. Let me take a look and see what we've got here for the afternoon for you?

RICK

3:38 Better. Yeah.

WILL

3:46 How's the new year treating you guys so far? Busy or?

RICK

3:48 So far? Good. Yeah, we're busy. Yeah, we're busy... which is good.

WILL

3:55 It's good to be busy, you know?

RICK

3:56 Yeah, I think so.

WILL

4:03 Right. So, I'm just pulling up my calendar here and you guys are, you guys are Eastern Time, right? I think I saw you guys are Rhode Island somewhere up in Maryland, okay?

RICK

4:07 Eastern Time? Yep.

RICK

4:10 Maryland. Yeah.

WILL

4:13 Eastern Time? Awesome. So, it's pulling up for me right now, are there days that work better for you or?

RICK

4:21 Not necessarily. I mean, Thursday or Friday 10 to be a little slower, but it's not a big deal.

WILL

4:31 Okay. Thursdays or Fridays tend to be a little bit better. All right.

WILL

4:48 My scheduling.

WILL

4:51 My scheduling systems here. It's being a little bit weird. I apologize.

RICK

4:54 That's okay. No problem.

WILL

5:01 Here we go. All right.

WILL

5:07 All right. So this?

WILL

5:10 Did you want me to look for this Thursday and Friday? Or do you want me to look at next week?

RICK

5:14 This Thursday? Yeah, Friday would be okay. This way. I think we have another demo scheduled on Friday. Yeah. So.

RICK

5:27 Yeah. Well, Holly, could you do one? We better do a Friday? Yeah, we got a lot of stuff scheduled Thursday, so Friday would be better this week or the next week, anytime?

WILL

5:28 Right.

WILL

5:35 Okay. All right. Let me take a look and see if I've got anything for this week, if not, I'll take a look at next Friday and you said you got 10 guys... give or take?

RICK

5:47 Yeah, we'll get three in the office running the service?

WILL

5:52 Are those, what are those 10 total? Or is that 10 all out in the field doing your service work?

RICK

5:58 That's 10 field guys and then three office people.

WILL

6:02 Okay. Yeah. So you don't have, yeah, we don't have to worry about the office people. There's. Never any charge for licenses in the office. All the office users come free. So that's really just kinda tailor the demos based on how many guys you guys have out in the field. So it, it's appropriate for your scale.

RICK

6:19 Okay.

WILL

6:25 All right. So this Friday?

WILL

6:30 Looks a little booked. So let's take a look at next Friday.

RICK

6:32 Okay.

WILL

6:35 Next Friday?

WILL

6:38 Next Friday looks pretty good. Looks like we've got.

WILL

6:44 In the morning, we got eight or nine and then in the afternoon, we have 12 one or two on Friday.

RICK

6:53 Yeah. Why don't we shoot for two?

WILL

6:55 Two o'clock all right. Let me just confirm your email here. I've got the Rick at I precision. Is that the best email to try to shoot that over?

RICK

6:56 Yeah.

RICK

7:04 Yep. Yep. That's correct?

WILL

7:07 Okay. All right. So, I'm gonna shoot this over to you.

WILL

7:11 The, the territory manager for your area, the northeast, his name is Brett Griffith. He's the one that you'll receive the Zoom link for in the email. And so, I'm shooting that over to you right now. So let me know if you see that.

RICK

7:21 Okay.

--- Call Setup ends ---

RICK

7:26 Yeah, that happens with this. Let's see.

WILL

7:26 Because if you don't it generally means I spelled the email, I spelled precision wrong. So.

RICK

7:41 Yep. I got it. We're will shirt. How do you say that shirt? Yeah, I got it. Okay.

WILL

7:42 Got it.

WILL

7:44 Sure. Yep. Yeah, sure. Yeah, that's it. That's me.

--- Next Steps ---

WILL

7:50 So, yeah, so.

WILL

7:52 If you, if you click on yes, or accept whatever it says there, that should add it to your like Google calendar or something like that as well, but we will follow up and... call you like Thursday before, just to make sure there's no, I mean, we're in the mechanical industry. So we know there's fires and, you know, emergencies that you got to put out all the time. So we try to do our best to confirm that nothing's blown up on you guys the day before the day up. So... and if there is anything, I think there should be a link in the email as well. If you need to reschedule that yourself, it should give you a link to his calendar there as well. So.

RICK

8:07 Okay.

RICK

8:11 Yeah, right, right.

RICK

8:20 Okay, cool.

RICK

8:33 Okay.

--- Next Steps ends ---

RICK

8:37 Cool.

WILL

8:38 All right. Well, so I have the billing issue in here for you guys specifically to go over for sure. Is there anything else that you guys would be particularly interested in? Are you guys looking for really detailed like asset tracking or work order history out in the field? Things like that?

RICK

8:56 Work order history is an issue. Yeah, the asset tracking, not really high on the priority list. So, we've like I said, we've been using a system for 25 years, so we don't even really know... what's out there. You know, we're just starting to look at these and so anything that you can show us is probably going to amaze us because the system we have is pretty antiquated, but.

RICK

9:23 But, yeah, definitely. The work order history and stuff like that.

WILL

9:28 Gotcha. So you guys are just kinda starting out to the process for sure?

RICK

9:30 Yeah, yeah.

WILL

9:33 Gotcha. I know you mentioned you had another demo, who are you guys demoing this week?

RICK

9:37 The BuildOps you're familiar with them? Yeah.

WILL

9:40 Okay. Yeah. Yeah. I am familiar with BuildOps.

RICK

9:45 And then we're looking at one called Davis were used to be S, 2000, I think or S2 K just because it's one of the people in the office used 10 years ago. So, you knew the name, but.

WILL

9:56 Yeah. Well, I will tell you davisware was built specifically for like refrigeration and the food service industry.

RICK

10:04 Okay.

WILL

10:05 So, they tend to be a little bit more limited for other types of mechanical. So.

RICK

10:12 Interesting. Okay.

WILL

10:12 Hvac and plumbing. So, because they were designed specifically for refrigeration at the very beginning, right? So, anything that they're kind of implementing for other industries is a little bit slower and kind of based on, you know, need and feedback so that, that's the one thing I can say about the davisware is that it's not specifically designed for just all service... but I don't I mean, I don't have anything super negative to say about BuildOps but...

RICK

10:18 Good.

RICK

10:28 Right.

RICK

10:41 Okay.

WILL

10:43 Like, like I said, that's the one thing that I kinda know about David ware there specifically, but.

RICK

10:47 Got it. Okay. That's good to know.

WILL

10:53 Yeah, other than that, I'll put those two things in there for Brett, make sure he goes over that, but he'll do an indepth, demo, he'll because he'll go over what you, what your office users will see, what you'll see out in the field most particularly, and even what the customer will see on their customer portal. So, and then the demos are recorded, so he can even send that back with you guys if other people need to see that internally, like schedulers, or dispatchers or other technicians. So, yeah, that's all recorded. So you guys will get that to take with you.

RICK

11:09 Okay.

RICK

11:14 Cool.

RICK

11:18 Got it. Okay. All right. That's cool.

--- Wrap-up ---

WILL

11:23 Awesome. Is there anything else that I can do other than getting you on the books sir?

RICK

11:27 No, that's good.

WILL

11:28 All right, man. Well, like I said, we'll follow up with you just the day before to confirm nothing came up. But if there's anything else, feel free to reach out to me. I can give, I can give you my contact info if that didn't come through on the email as well.

RICK

11:37 Okay.

RICK

11:41 Okay, great. All right. I appreciate it.

WILL

11:43 Hey, no worries. Well, have a great day. Thanks. Bye bye.

RICK

11:44 Thanks you too. Bye bye.

The End