



# ServiceTrade Renewal Review

Juanita Guzman with Rapid Fire Protection  
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## Participants

### **SERVICETRADE**

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*Account Manager*

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# Transcript

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--- Small Talk ---

JUANITA

0:00 Hi.

BRENDA

0:00 Good morning. Hey, good morning. How's it going?

JUANITA

0:04 I'm well, I actually just got back. I was out of office Friday and yesterday just took a little bit of pto some back today and I feel refreshed which is a good point.

BRENDA

0:14 Nice.

JUANITA

0:15 Yeah.

BRENDA

0:16 Hello. Good. Yeah. Yeah.

JUANITA

0:21 Hi, my brother actually just got married in Mexico. I think it was going on. I had a nice last month, so I didn't get the GL.

BRENDA

0:33 Man.

JUANITA

0:34 I know my passport is still expired, okay? Because they're having like the big wedding next year. So I'll definitely have my password by then.

BRENDA

0:45 They are going to have it over there as well.

JUANITA

0:48 Yeah.

BRENDA

0:49 Yeah. Yeah. Do it.

JUANITA

0:51 Majority of her family is, and also our newly, we have like half of them still in Mexico and then have here. So.

--- Pricing ---

BRENDA

1:01 Nice.

JUANITA

1:02 Yeah. Awesome. All right. Well, let's talk about your upcoming renewal, which start December first.

BRENDA

1:14 Okay. Okay. Yeah. I wasn't sure on when it was because who asked me? And I might, you know what? I don't remember what it was, but, yeah. So they see the price went up a little bit, right? Like 50 dollars, something like that?

JUANITA

1:30 Yeah. So, well, you guys came on at like old pricing and then we had, there was a price increase two years ago, and then actually another price increase just happened on October first. Okay? So you won't, we will bump you up all the way to the new price. It'll just be a seven percent increase year over year. So, the, what you're seeing is a seven percent increase.

BRENDA

2:02 Okay. So, seven percent upfront to reach is what the cat or is there a cat?

JUANITA

2:07 Correct. Yeah. The cap is.

BRENDA

2:10 Seven percent.

JUANITA

2:12 App is on your current subscription, 89 dollars per technician per month.

BRENDA

2:18 Yeah. So... 89. So that's awesome. 68. Okay. So, right now, obviously, that can change over time.

JUANITA

2:33 Right, right. And usually see price pricing increases. I would say like every two two, three years... and that's because we're really putting a lot of R and D into, you know, just developing new features within the platform as well as enhancing the current one. For example, I know in the very near future, we're going to have some project management features... what's been on our road map and prioritize recently.

BRENDA

3:09 Sounds good. I know we're still looking into though inventory management. I know Paul, he's still working on it. She, no, we're still, we still haven't moved so that's still in the works. I don't honestly if I'm honest with you, I don't foresee that happening until spring because winter's coming. It just gets really tough to do any changes. But who knows maybe he, our owner decides that, you know, December, it's a slower month. December, January are usually kinda slow months because, yeah, most businesses are trying to prepare for the holidays. They have a lot of people to ask for time off. So they try to like not take on huge projects during that time. And then January is just kinda like, okay, let's settle back down and ramp up again. So, I think... I guess realistically I would say April we are idea is just to start improving this or, you know, just implementing this. And... when we moved to that new location because that would be ideal because then we'll have, you know, like a fresh start at inventory. So I'll talk to... Paul and then find out... what he thinks about or if he has brought it up to Ted. I don't know you gave them pricing. I do remember that. Now, you did tell me that was on top of this. So it would be an additional feature on top of our monthly tech.

JUANITA

5:03 Correct. Yes. So one quick question, you mentioned April as like a realistic time is April when you would want to be live with this or just now or just, you know, begin the onboarding process?

BRENDA

5:21 So, how long? I know you told me it takes, you know, like a couple of months.

JUANITA

5:28 So, partsledger... we do a window of four months, okay? Just to make absolutely sure that, you know, we get you live within that timeframe, it doesn't always take that long, but we do allow for months. So right now?

BRENDA

5:52 Hello, for weeks that four months or four weeks?

JUANITA

5:57 Or months?

BRENDA

5:58 Four months? Okay?

JUANITA

5:59 Yeah, I'm by no means will it takes that long, but, and you mentioning April, I just want to make sure we're like in a sense working backwards because if it will take like three, two, four months. So really we would want to get started like January first or somewhere around that time if you want to book online. Hi April. So that's something to keep in mind. Let's just work backwards... find the four month window.

BRENDA

6:28 Yeah, I'll bring that up to Paul when I meet with them and just let them know. Hey, you know, this is what it looks like. We need to be proactive and just plan for this ahead of time if you want it to be implemented as soon as we move, when they're in like a lounge, our new location or, you know, some of our, some of our current like we do have a partner department, which is the one I manage and I have a coworker, his name is Omar. He's kinda taken over that side for me. So I do mostly consulting. And so my T for rep. And now I'm kinda scaling backwards a little bit just because have a lot stuff going on here... and just helping my ongoing doing other things. So I will talk to Omar as well. But I know power washing is gonna probably stay in our old off or where we're currently at for a couple of more months. And I don't think, I mean power washing, it's mostly labor. So there's not a lot of parts symbol maybe BuildOps and the last gloves like the cover, some the lights for the foods, but those are not things that get like change every time. So it's very like sell them. That happens. So, I think it should work.

JUANITA

8:00 I'll...

BRENDA

8:00 Talk to Paul and then we'll go from there and I'll let you know what he says.

JUANITA

8:04 Yeah, just won't be.

BRENDA

8:05 Pricing, correct?

JUANITA

8:08 Yeah, however, let me revisit that email and maybe.

BRENDA

8:13 To, if that went up.

JUANITA

8:16 And the pricing. So I do know that with our new pricing, it did go up and I had quoted you the old pricing... however... I'll have to check with my direct supervisor, but I believe we're honoring the old pricing through the end of the year for existing customers. I'll have to see if there's like a deadline on that, but regardless, it would pretty much be around the same time in which you all would need to start, you know, thinking about that stuff around December, January to be live by April, but.

BRENDA

9:01 It would be one 39 or 89 per user or like is this just for... I guess I'm confused what this is?

JUANITA

9:13 Hello. So this is the updated pricing. So partsledger requires you to be on premium. So, okay, it would be a bump from select over to premium. Of course, he would get additional feature. And then on top of this, there's an annual subscription for partsledger. Okay? But I'll get that sent over to you... here's.

BRENDA

9:39 Okay. So it kind of do the math I'm missing... and then I know you're gonna check on that because if I do the math currently with the new either, even with the seven percent increase, we wouldn't be a bad... so... 13 eight seven seven... and that's divided by 12. So it's 11.

BRENDA

10:14 And that by 1,616 text, is that correct? No, I'm doing the math wrong? So it's what's my annual, all it's eight can protect currently eight, 10 divided by 12?

BRENDA

10:36 81 81 dollars. And so that would increase our pricing... by about 25 dollars. Is that correct? Perfect. One, eight eight, six six, seven. Yeah, that's gonna be a big bump like 50 dollars more per tech per month?

JUANITA

10:59 Premium or?

BRENDA

11:01 Yeah. For premium, what happens is because what you're saying is we're currently in the old pricing. So for us to move up to that premium feature, it's gonna be a big bump for us. So we kind of in a way would loose or grandfathered in pricing. So, I think that's what I'm from our last conversation with Paul. I think that's what we were kind of like the waiting, you know, like because we don't you know, it's something we wanna do but it's not like super important, you know?

JUANITA

11:38 Yeah, no, I definitely understand that these are conversations I've had with other customers who have also been grandfathered in to, you know, legacy pricing.

They don't want to let go of that, but they do want to adopt more service trade. So it's like, I mean, we can definitely work together on that like I mentioned to you all before because I know it's been a concern. So I would say, don't get scared by the list pricing because we can most definitely work with you on that.

BRENDA

12:09 Okay. Yeah. Yeah. I wouldn't be opposed to like, yeah, like saying let's move to premium, but kind of taking consideration that, you know, we've been with service trade, how many years since almost since you guys started?

JUANITA

12:26 Yeah, it's been.

BRENDA

12:27 Quite. So, yeah, it's definitely been good. I mean, some feedback just for your reference. Like I've noticed the text support being a little laggy lately. So you get like, you know, how you go on the chat, you'll get somebody to respond to you like hours later. And then after they respond to, you could take some more hours, another like say you go back and forth. So it's been kind of slow on the text support side as far as like compare from before where it was very prompt like you or almost instantly chatting with somebody trying to solve your issue. Granted a lot of things, you know, just because we've been using it for so long and I know a lot of things. I can usually troubleshoot a lot of things myself on my end where I don't need to be, you know, I don't need to contact them less often. But I did notice that the other day I had an issue just to give you an example, I had an issue with an invoice that was paid. It was set service train, the invoice. And so this customer paid us gave us a job number and a invoice number, service trade base on the check. And so we received the check and we're like looking for that particular job number in that particular invoice number and nothing will populate.

--- Pricing ends ---

BRENDA

14:05 So I reached out to service trade. I'm like, I wonder what happening? Like, can you look this up for me? It's a native invoice from service trade. It's a job number from service trade. So what are they paying? And why can't we see it? Well? It ends up being, I, we figure it out ourselves because I mean, this text support never responded to me. I said they were gonna look into it, but they never like follow back with me. So it ends up being that it was from one of our competitors that also use a service trade and they paid that invoice for our competitor, but they it to us instead of them. So we couldn't see it because obviously, that wasn't one of our job with that was created for a company. It was for somebody off through service rate. They were sold five. So anyway, that's what happened but.

JUANITA

14:59 Yeah, I have to.

BRENDA



15:02 I can look back. It was a girl. The girl, I've never talked to her before. I can go in my, I don't remember her name.

JUANITA

15:10 Hi, Elizabeth Ray, Britney.

BRENDA

15:15 Yeah, I can look back, but, yeah, she never responded. And then I got, you know, one of this, I haven't made it like little prompts that you guys have? Like how did your service go? Blah, blah, blah. You never responded to me. How am I? Like we'll figure it out? It's no biggie like I said, I just notice little things like that as you grow, you know, things kinda fall through the cracks.

JUANITA

15:39 Yeah. Well, yes. But, you know, it still shouldn't have non.

BRENDA

15:45 I don't know. I just, I didn't notice those things that, you know, if we do need service, I notice it's taking a lot longer, maybe because you have your customer database because obviously a lot bigger and larger. So then, you know, it takes a little while to respond. But other than that, that's you know, pretty much that and the pricing that's all the feedback I got from the office email that we sent out that, you know, saying, hey, we're gonna, we're nearly there anything we need to bring up, you know, and that's pretty much all it came up too. So no, no big things.

JUANITA

16:22 Will still, I appreciate the feedback. No, we really do, you know, take that type of feedback seriously. I found it looks like it was Ray Henderson. Let's see.

BRENDA

16:41 She, where she is this? Like she's got an hour like look into it and then nothing happened after that.

JUANITA

16:47 Let's see. This is what I see. Okay. It looks like he responded. She said, hey there, Brenda... something.

BRENDA

16:57 Yep. And I sent her that, see.

JUANITA

17:02 Was the payment received via the payment portal? Do you want your staff?

BRENDA

17:09 We use the payment portal, but no, it was a check that came through. Yeah. Yeah. And then it was just like, you know, like it was the eleventh. So that was pretty quick and I think I have yours. I don't know if I responded through that through the chat or are you able to see it even if I replied on the site, you know, I'm not placement on the email like... reply by email instead of the chat. Is that showing on there?

JUANITA

17:42 That should pull into here as well.

BRENDA

17:45 Okay. Okay. Well, no baby. Like I said, we figured out, we actually call that customer and ask them could just check on this and accountant made a mistake by the wrong vendor. So.

JUANITA

17:59 Wait. So there you're both a vendor of their.

BRENDA

18:04 Yes, apparently, yeah. And we're paying, I like to see what happens is total fire. Have you ever dealt with them?

JUANITA

18:13 No, but I'm very familiar. Yeah, there. Okay? Of our account.

BRENDA

18:17 Yeah. So total fire is having a big like they're growing. They're trying to like take over, you know, Monday, yeah, whatever, you know, anybody around... they don't try. Yeah, that's right. We've forget like multiple things like offers for like different companies like this one out of Minnesota that's called Rapid Fire Protection too.

JUANITA

18:41 There.

BRENDA

18:42 And yeah, and so, so they always like try it like they've reached out to us. They want to buy report my domain. They were so Adam to get my domain. I might, they offer me 20 grand and I said I'm not giving you my domain. I said we've got it for.

JUANITA

19:02 Yeah, our system that calm.

BRENDA

19:04 They want it that they didn't want to be dot net. Yeah... no, that was... anyways. But yeah, I know they try, you know, I mean, like any proper hammering, I totally get it. That is very...

JUANITA

19:18 Small you.

BRENDA

19:19 Know, we're more family oriented and he wants to stay that way. I mean, who knows down the road? Maybe he decides side when I retire and I'm going to sell it maybe. But anyways, yeah, total fire was there because they're trying to just grow and take over a lot of things. The only thing that they don't do which I don't blame them. It's hood cleaning and hood cleaning is such a big deal here in Michigan just because there's not a lot of people that do it... because it's a we're off business to get into. So a lot of our customers we retain by keeping in house click gaining division. Like we don't sell about everything's site based that all of our employees for power wash, work for us get paid hourly.

--- Small Talk ---

BRENDA

20:14 We don't do permissions. We don't do any of that. They work by the hour for us and some customers like that. And also, they like the local, you know, by local state.

JUANITA

20:26 And laying, namely business. No, I definitely get it. And great for you guys because I also come from like a family business like my family as a restaurant and it's just still refreshing to like not deal with like these big corporations guys to have that family day, right? Kick, right? Absolutely. Tell.

--- Small Talk ends ---

BRENDA

20:49 Yeah. So anyway, but that's you know, pretty much what the owner strategy is, and obviously, we do lose some just based on them trying to like take over everything, but we mostly keep you in our customers and a lot of them have been with us for 20 years, 25 years.

JUANITA

21:08 So...

BRENDA

21:10 Yeah, we try to be loyal to them until therefore, they're loyal to us but we also know other how business go somewhere.

JUANITA

21:17 There's no loyalty.

BRENDA

21:18 So then, you know, they can, we've had so many customers go to a different vendor and say we're going with them and we're gonna, and they make them sign a contract and all this other stuff. And then as soon as they're done with it, they come back there like we didn't like it was horrible. They're just the number, you know, all my.

JUANITA

21:38 Okay. Well, yeah, that's funny that's like us with our customers because there's a lot of other competitors like trying to enter the market as well.

BRENDA

21:47 Yeah.

JUANITA

21:48 And we've had like some customers leave thinking they were going to like better, bigger better things. And then they'll come back to, you... know, like we really much.

BRENDA

22:00 Yeah, no, and I can only imagine for instance, the implementation to go to a different vendor and especially in what we have like with service trade to carry over all your customer database to another platform, teach your text.

JUANITA

22:16 To use this platform?

BRENDA

22:18 Like them?

JUANITA

22:18 Money that...

BRENDA

22:19 Will cost. And then if it doesn't work out, then you're back to square one, my gosh. I cannot even, yeah.

JUANITA

22:26 Yeah, we...

BRENDA

22:27 Had a hard time making them use service trade and we've been with you guys for years and, you know, people are reluctant to change. So it's not for them as text to be out there learning new things. And yeah, they would hate it if we did that, but it is what it is.

JUANITA

22:45 Yeah, that's funny. All right, Brenda, just to confirm you are on Quickbooks desktop?

BRENDA

22:55 Yes. And that's another thing that we've noticed actually the thing you brought that up, it's so with our CFO and she mentioned that we're having issues with I'm thinking because apparently there is something on desktop that's not sinking anymore with your Quickbooks. And I can find that out. I think she reached out to you guys about this... okay?

--- Pricing ---

BRENDA

23:31 Let me go off screen here real quick. So I can look for that. So Quickbooks. Yeah, March of this year. So she said I upgraded to Quickbooks... 2022 desktop version. She was running 2019. So she had to switch because payroll was no longer being supported.

BRENDA

24:09 And then she said that service trade is not assess. I'm a little frustrated with the service trade supports that we have to contact Quickbooks or we solve this. I'm not sure what's happening service trade can't integrate to this version of Quickbooks? I wonder if that was resolved because that's what it's all the way in March?

JUANITA

24:31 Can you forward me that from too? Yeah. And I'll...

BRENDA

24:34 Yeah... for word.

BRENDA

24:44 Okay.

JUANITA

24:44 You said you upgraded to Quickbooks desktop?

BRENDA

24:47 Yeah, she kinda goes in detail there on what she has and what she upgraded. Yeah. And then I responded to her. I think just basic question is the online version.

And then she said no. And then I'm gonna also like just follow up with her reply... and then ask her the December that would solve maybe it did. And I don't know about it. She doesn't tell me everything.

JUANITA

25:21 That.

BRENDA

25:21 They're you know, so she forgets the email me.

JUANITA

25:24 Yeah, please. Let me know it, should we prefer to talk to them first.

BRENDA

25:34 All right. I just sent her an email. We should be good. So she needs to pay this renewal. So, what would happen if we were to upgrade, say we renew right now for all of our tex, what would happen with, if we wanted to move up, would we get like?

JUANITA

25:55 Yeah, that's a great question. One of two things can happen since your renewal will be December first, we can either, if you talk with Ted Paul and decide if this is something you guys do wanna do, we can essentially just swap, do the premium and partsledger at renewal time 12 one or if you guys need a little bit more time to decide and talk things through, which is totally fine. We can renew you as is. And then whenever we do have that like final start date of premium and partsledger. Let's say, for example, it's just, it's January first since you paid up through the year. Essentially, we would give you a credit of 11 months and apply it to the new.

BRENDA

26:43 I see. Okay. So kind of pro rated in a way.

JUANITA

26:47 Yeah. So it'll be okay?

BRENDA

26:49 Yeah. So as long as to like she'll get the invoice for this because obviously, it's a big amount. So she has to take a look at her in what she needs to do for payment for this new invoice. I think as long as she pay said before December, she's good, right? Right?

JUANITA

27:09 Perfect.

BRENDA

27:10 Okay. Bye.

JUANITA

27:11 And to confirm on that, everything on that looks correct, 16 technician.

BRENDA

27:19 Yeah, I think I just recently, so I was gonna ask you this when I like for instance, we just had a tech that left and then we brought somebody in. And so what I did is I deactivated one activated and another one. Like we're on the same day buffer say, let's say I have a text that's gonna leave the company in two weeks and then they bring on another tech and register him message to get them to training. Blah blah blah... and then during those two weeks that we're gonna have kind of an overlap, do you guys keep track of that or should we not worry about it? Because see this previous time, what I did is I did it on the same day because I wasn't sure how would that would work out if we were gonna get charged like for a new tack? And then, you know, we'll yeah, the old one. And so.

JUANITA

28:18 Never get an invoice unless I talk to you first about additional tactics. Okay? Don't worry about it. Whenever it comes to that type of stuff, we really do have like an honor system. We just ask her customers that they let us know whenever they are adding additional technicians. We do monitor usage periodically, but that's when, you know, if I see for example, like an overage, a five technicians, I'll reach out to you and say, hey, Brenda, I noticed though and so is accurate. And then, you know, we can talk and then I will trigger the invoice from accounting. So you'll never pay for anything you and I talk about.

BRENDA

28:57 I don't know how strict you guys got. So I was like...

JUANITA

28:59 Okay.

BRENDA

29:00 I'm gonna do this the better.

JUANITA

29:01 Strictly at all?

BRENDA

29:04 No, no. And we totally one of the, you know, honest about it. So we just wanted to make sure. Are we okay with like for instance, somebody quitting in two weeks and we have to bring somebody on board, get them trained getting, you know, so we need them to be a deck for that period of time. And then eventually in two weeks or whatever they notice they gave us well, the activate. The other thing that's kind of part of worries.

JUANITA

29:28 At all, you guys are fine.

BRENDA

29:30 Okay. Sounds good.

JUANITA

29:31 Perfect. I know we're up on time, Brenda. So just to recap, let's see, you will send me over that email about the Quickbooks sinking issues from to, I'll look into that. And then I will send you updated pricing for premium and partsledger on 16 technician.

--- Wrap-up ---

BRENDA

29:51 Yes.

JUANITA

29:52 And in the meantime, you can talk with Paul and Ted, you know, about like time line, what would work best for you all? And we can go from there.

BRENDA

30:03 Right now, just a quick question when you say 616 text and I believe I asked you this question before, but I don't remember the answer. So say we only needed implemented on half of our tex. So say, I don't know nine or eight instead of the 16. Are we able to do that or we have to literally merge everybody over?

JUANITA

30:24 So you would have to merge it, everyone over on to premium, but using partsledger, we can just do a few. It doesn't have to be all of them.

BRENDA

30:35 Okay. Okay.

JUANITA

30:36 Yeah, but as far license, yeah, it has to be everyone on premium, but for partsledger, we can pick and choose who's using, who's not using.

BRENDA

30:44 Okay, perfect. Sounds good. Alright.

JUANITA



30:47 How many users out of the 16 would be using the partsledger mobile to do things like look up part, transfer, stock, request, POS?

BRENDA

31:00 Don't know that's a good question. I will have, I've talked to, have Fred and Paul to ask them. I know initially it's going to be just a few like I'm talking less than five. Okay. And then as we move as we move forward and they get used to it, then we'll deploy it to other people.

--- *Wrap-up ends* ---

BRENDA

31:21 And that's how we do things just because sometimes if we try to do everything at once, it gets crazy because then they all like, you know, I have a question. I don't know what I'm doing and it's better to do a few, and then we kind of get them up to speed. And then we'll move from there.

--- *Wrap-up* ---

JUANITA

31:39 Yeah, that's totally fine. And that's what a lot of our customers do. So, for the meantime, I'm just gonna quote you for just five actually using partsledger. Yeah. Okay. Wonderful. All right, Brenda. Well, thank you so much. I'll be on the lookout for that email from you and I'll send you the updated pricing end of day today. And yeah, we'll just be in touch and, okay, what everyone else?

BRENDA

32:06 Okay. Sounds good. I appreciate it. Thank you later. Bye bye bye.

*The End*