



# **ServiceTrade/Haynes Mechanical Follow Up Call**

Maribeth Steffen with Haynes Mechanical Systems, Inc  
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## **Participants**

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# Transcript

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MARIBETH

0:00 Hey, Tim.

19198157996

0:01 Hey, Mary, Beth. How are you doing good? I'm in the car with J have zero born.

MARIBETH

0:09 To the Raleigh airport.

19198157996

0:10 Where?

MARIBETH

0:11 Are you?

19198157996

0:12 At Atlanta... Atlanta?

MARIBETH

0:16 Atlanta?

19198157996

0:18 Your old stomping grounds. So, Melbourne... melbourne daughters moving to Colorado. So he said he may reach out to you.

--- Call Setup ---

MARIBETH

0:27 What's that?

19198157996

0:28 Yeah. I thought I told him I said that's right up our alley. She'd love that yeah.

MARIBETH

0:33 In the...

19198157996

0:33 Denver, yes.

MARIBETH

0:37 Yeah, cool. Alright. What's bringing her out here?

19198157996

0:42 I don't know. Did you say you didn't I don't remember.

MARIBETH

0:46 Alright. Here comes Troy.

19198157996

0:48 Okay.

19198157996

0:58 Hey, Troy?

MARIBETH

1:01 How's it going?

19198157996

1:02 Are you?

MARIBETH

1:03 Pretty good. Pretty good. We have Tim on the phone too. He's calling in.

TROY

1:09 Hey...

19198157996

1:09 Troy, how's it going... good... good?

MARIBETH

1:14 So, I shared with Tim the good news that we made it to the final two along with BuildOps.

19198157996

1:21 Correct.

MARIBETH

1:21 Yeah. So, we're pretty excited about that.

TROY

1:25 Yup. Good. We are too. Yeah. So, we... we met, was it?

19198157996

1:32 Thursday...

TROY

1:33 With the executive team and just do the checking in. So we did that and it's all go. I'm one person wasn't there. I'll catch them up on it, but, yeah, we kind of just started with, you know, the next, I would call the next level of accuracy on the estimate as you kinda get closer... closer.

--- Call Setup ends ---

TROY

1:52 And so then, you know, what's next? Is it kind of just kind of start to work on agendas and times yet and people from our side and your side to get people I'm ready for the demos. We started them a little bit today, but, yeah. And that's kind of what we see is next.

--- Small Talk ---

MARIBETH

2:13 Alright, cool. Yeah, I know you had that meeting with the leadership team to determine whether it was a slower go. And we had talked, we had talked about a potential onsite visit in the last two weeks of April. Is that kinda what you're shooting for?

TROY

2:28 Yeah, might, it might slip a little bit into the first week of me, but yeah, those three weeks last week of April to the first week of may, I think is what I'm working. I think there's a sales thing happened in the last week of April, so that's why it's probably gonna be whatever that the third week of April and maybe the first week of may, so.

MARIBETH

2:51 Okay.

TROY

2:52 20, yeah. So that week of the eighteenth or the week of the second?

--- Small Talk ends ---

2:57 Okay. I'm trying to confirm that this week just to make sure that I have those things right before, but yeah, that's what we're looking at.

MARIBETH

3:06 Okay, awesome. So, as you guys have kind of talked with the team internally, I'd love to know. I know we kind of talked a little bit about a couple of weeks ago, but what are some of the things that you guys are really excited about as it relates to... to service trade? And then what are some of the things that, you know, you might be unsure of that we need to... to kind of clarify at the?

TROY

3:28 Hello, dust it off my list. My... let me see. I think the things... things that I think the team in general, I said we're impressive or just the, you know, your help forum like a better. Just pretty much didn't know if we don't know how something works. We just kinda Google real quick and your and then asking really good. I'm so excited about that. I think I'm excited. They're both above apps, give him a slightly different view on how to do certain things. Not like we were talking about just... just a different way of approaching the similar problem. Some pretty excited about that. I've... I've like some of the, what I call that just kind of knowledge capital you've put up there lately that you've shared that, you know, that that's like really impressive and thought provoking as well. Sure... sure. One of those with the team and some of the executive and that was pretty great. I think the... the things that are, I... I don't wanna say concern the things that we want to see a little bit understanding is the like we've talked before the separation between the forms app and the tech app. Is it, how seamless? Does that feel? Because we're kind of coming from a world where it feels like they haven't been like three things all the time and jumping around and they forget and they do it out of order. So that and then just like, well, we need XY in the future, that kind of thing. So, namely, for mean, I think we got pictures and videos covered but CR, we're doing now for data, name plates and getting better equipment information would be one probably big one. And then any sort of thing I didn't think I mentioned this last time and I don't even know the answer but just, is there like a way to put up like a knowledge base or things to protect the share information about like, hey, we ran into this chiller, do this thing, right? Those kinds of things I don't that's the other thing that exile offers. I don't think we're using it extensively. So it's a huge thing. But just that... I think we want to learn more about the accounting system kind of this discussion in decision there. I think that I don't know where everyone's head that I mean with BuildOps, we have no choice but to switch from GP that's a good and a bad thing. I, in my opinion, the good of it is it's real, it's actually it's next, I don't think it's past business users to understand what is GP and one. Is to get you back today, you can't look at a screen and say that's GP that's an add on. You can't tell. So it's gonna be really like to do an integration to be, it could be pretty awkward because there can be person the screen that are either invalid or not needed anymore that we have the either undo or stuff. So there's some advantages of just kind of as people say rep in the band aid off and just be done with it. Of course, then you got more dependencies, bigger project. All those things is kind of the big downside. So we'll definitely want to talk about that we're looking at. I guess I... I take your opinion, I think you guys integrate with, I think a few more than BuildOps, but it seems like and others ads and it seems like most people are doing impact these days is from, but is that your experience or?

MARIBETH

7:01 Yeah. I mean in taxes are really very modern accounting system. It's a good solution for you guys right now. Since you're... you're really strictly on the service side of things, they are launching a construction module, but for... for where they sit right now, it's a really great fit for you. I think the other recommendation that we would have for you guys to take a look at is that sweet that's also a really good platform for service companies like yours.

TROY

7:33 That was kind of the two on our list. You don't do anything with like to call them business central, the Microsoft business central.

MARIBETH

7:42 Do you know anything?

19198157996

7:43 About that? Yup... yup. So... business central has come up a couple of times. No one has written the integration. We have been talking to actually some of the original people from Kate at the wizard button that we mentioned that our highest score out of South Dakota, North Dakota. There they were, they're... they're very interested in writing one. They're just kinda waiting on a customer to come and say, hey, any, anything? Okay? Alright?

MARIBETH

8:16 I know that you had mentioned before that the accounting decision is not really kind of the primary driver for this that you guys are focused on the service side of things?

19198157996

8:26 If...

TROY

8:27 You...

MARIBETH

8:27 Guys are to rip the band aid off. Is it something that you're gonna do in tandem?

TROY

8:32 Kind of implement?

MARIBETH

8:33 Both systems at the same time.

TROY

8:35 Yeah. I think that's I mean, that's currently the thought. I mean, yeah, like I said, when we have the discussion with you guys offer the opportunity that we could do it either way we can do service and do accounting later or advice or print or vice versa, but are we do both at the same time build out?

--- Pricing ---

TROY

8:54 So we'd have to do both at the same time that the timing we're looking at. I mean, I think kind of what I'm seeing this timeframe is kind of through the first week of may, it's the decision. And then once we... pick... pick a vendor, then the next, what I think the next three, two, four weeks look like are the detailed kind of implementation planning and budgeting and getting all that kind of solidified who is doing, what, how much do we need to do? What... what resources? All that? Because one of the things that... that we and I'm sure people do this along the way if we're going to be quite a bit of data quality... and they'll be some process changes, nomenclature chain and all that. So we're... we're anticipating. I mean everyone here is, I kind of threw that out. And so if we were, if everything went perfect and we started June one which I don't think we'll start exactly June one. That also happens to be one there craziest busiest here because of.

19198157996

9:54 Summer. Yeah, it works out.

TROY

9:56 Okay. Because we'll have plenty of stuff to do as a small team to get ready. And we're looking at, I, to be honest, I started doing the math. You get really close in November and December and I refuse to do project implementations and those months just from past lives, patients and holidays and if it's not good. So we're looking at a Gene very end of January. I think go live for this. Okay. I'm just when you just do all the math and you kind of looked at where we're at. And I think everyone feels pretty good about that timeframe. That also that says it, we're switching accounting, we can close the books, start a new accounting system or new year that are, you know, that makes everyone kind of smile and it's a good, it's always a good little starting point. So, I think that's where we're roughly looking at timeframe. So kind of that and I... and I think it's gonna take, I think it's gonna take that long to like, you know, really figure out how we want these processes to be, what the, what we want, like what data we want to clean up and clean and existing system, or willing to do something outside the system, all those choices and make along the way. But, so.

MARIBETH

11:07 Yeah. I think from... from our standpoint, we would recommend kind of budgeting probably 122 150 day implementation. And, you know, our project management team, of course, like you said, everyone who makes the transition uses that as an opportunity to clean up data.

--- Pricing ends ---

MARIBETH



11:31 You've been doing this a long time on your existing systems and no one keeps that information is up to date as one would like. But our project management team can... can certainly help with some of that in terms of how does the data needs to be structured, kind of reviewing any duplication and things of that nature. Of course, you know, you'll have to guide us in terms of who's no longer a customer who you don't want in the system whatsoever and all that. So, so I think, you know, that timeline really aligns with kind of what we had in mind and probably has a little bit of a buffer in there for you as well. Would that with the holiday season and the busy season? So, yeah, that sounds good. And yeah, the other thing I was gonna say is, you know, in terms of BuildOps, you know, we... we, I've been doing this a lot longer than they have. So, yeah, that knowledge base is something that's really key to our customers. We have a team that's dedicated to updating those articles. And of course, it's not your only resource. You have access to frontline support. You'd have an account manager that's dedicated to your account, and then a project management team during the implementation period as well. And then I work with both existing and existing customers and prospects. So I'm right here in Denver. So I'm obviously a continued resource for you as well. So in terms of that meeting.

19198157996

13:07 With...

MARIBETH

13:08 The team, I know you mentioned it'll be a pretty big group. I don't imagine that you've kind of put that down and put an agenda together in terms of who's gonna be involved in what we need to focus on, okay? Alright?

TROY

13:22 Yeah. I saw that today. Yeah, actually what... what I'm envisioning is giving you kind of like a basically like a script.

TROY

13:35 So for example, and I'm... and I'm taking a very much, we'll see what the team thinks. I'm taking instead of eight software functionality. I'm taking more of a process he built. So for example, now this I can list. So the first one would be brand new customer, create a quote, right? A contract, add assets. We'll give you a list of the assets that they, the tasks, the task you we want, set up the frequencies. And then we create a create the PMS, what we call the preventive maintenance, the monthly appointments. And then that we're kind of then, and then the next one would be the dispatch shows up and they would go ahead and put it on text schedule. And then in the process of doing that, the phone rings and there's a customer that has no heat. So create a call added to the text schedule. Then switch gears. A little bit in the text comes in with this mobile device goes and starts his day. Goes to the first one works... works on the PM closing out. There's a broken pop. So he submits quoted repair that will use another, you know, so you can see the flow I wanna take because I think I'm hoping that will help people understand just like how this would work in like a real life scenario. That mean that's exactly what I have so far. I'm kind of laying out in the team to look at it, figure out who would be in each one of these. But I think we'd probably do sales and contracts would be in like that. First one, a new quote customer and contract, maybe our care team. And then we would do dispatch texan supervisor kind of for the next three which is dispatching a preventative maintenance call service call, as well as an emergency service. And then having a

technician complete the work. And then we have our service sales team come in for like 40 in a new quartered repair. And then I have one, I mean we ship saw some powerpoints of the new project functionality. Is that gonna be there? Is that not gonna be available to demo, get the time?

MARIBETH

15:46 So kind of what we had in mind and it's... it's really dependent on kind of scheduling. But we were thinking about having our cto and cofounder Brian Smith work come on site to discuss what aspects of the project management capability has already rolled out and what the timeline is for the remainder of the release which will all be live by the time you are. And then what he can additionally do is kind of talk further about the roadmap outside of project management and what our focuses are kind of moving forward. Well, we found is it's always helpful to have someone who's not a salesperson in the room. So, okay, he's a... he's a good resource for sure.

19198157996

16:37 Hey, you know what else? I was like? I didn't get that again, totally up to you guys. But I mean, something else I'm thinking about is how do we, how do we elevate? Alright? You know, any of those, right? Elevate Haynes to the next level, right? Because you're making the right change obviously at a baseline level? Yeah, it's gotta be able too because I gotta be able to do other stuff, but I wanna make sure that we... we sort of say, yeah, what's the... what's the game, right through the pain where's the game... but... but... but maybe near it's I mean, I get going through the work orders and all that. But I do wanna make sure that we... we figure out a way to show them. Hey, this is what's possible.

TROY

17:14 Right. Well, I think that, well, I mean there's some of that. I mean, I kinda covered the base. I think the last two kinds of scenarios I was thinking about was just... just the overall customer experience and managing, yeah, summer relationship, you know, like that is like just don't like it's just really hard and our current system. So showing that. And then the last one is just reporting and dashboarding. Like those two things. I think people will see some stuff they... they can't do... in... in our kind of... of ROI like mini, I don't even call before. I mean, we're looking at. I think we told the exact, just doing it in like two departments. We think we can say... like... like 2000 hours a year.

19198157996

18:02 Got it. Got it. Okay.

TROY

18:03 We already kind of made that pitch as part of it.

19198157996

18:06 Just always things that we...

TROY

18:08 Can automate that we... that we don't do today or?

19198157996

18:11 Perfect for.

TROY

18:12 Example, like just getting like this is funny, but just give you a list of outstanding quotes and the amounts, and then when a quote was approved by our customer like that as an excel spreadsheet that someone spends, you know, a day a week, right? So that goes away like great.

19198157996

18:27 Yup. Got it. So.

TROY

18:28 There's those things. So I think we can... we can put those in and I will share all that with you guys. So you can... you can purchase those things you want. But I definitely, yes, please. I mean, no, I think I have, I think I have, one of my last scenarios is, you know, while was, you know, everything about us but what else... what else should we be thinking about? So BrightFunnel leave time for that perfect now. But I'm trying to... trying to create a really detailed document of like what we want, what we think we need to see. And then, you know, we're gonna like here's the trick. You guys another trick like we, you, all the terms are different or like. And so then there's this like whole map that has to happen. Like, so I'll try and give you our... our terms of creating, got a few terms. So let me say this term. You at least can say, well, we say that we're visits, we made an appointment or whatever that's your appointment, right? Or... or, and then I'm gonna kinda lay out how we currently think about it. But you might say, well, that's the start. We read your script, but we want to do this because we found our clients. This is much better way accomplishes the same thing. That will be great. I'm... I'm trying to stay out of, we're trying to stay out of and the script have so much on how is in more on what's but, you know, it's hard. You always get stuck a little bit in the house at some point, so.

19198157996

19:54 No doubt, no doubt.

MARIBETH

19:56 Well, I'm... I'm really good at going off script. So.

MARIBETH

20:04 Yeah, of course, you know, from a... from a base level standpoint, we mean and an operational standpoint, we need to make sure that I set up gonna accomplish what it needs to accomplish for the team since this is a... a committee decision. But yeah, we have, you know, like we've talked about a 1,000 customers. We have a lot of insight in terms of what other companies are doing and what's driving revenue and growth within their business. So some of that is process and... and some of it isn't so yeah, we can... we can talk a little bit about that. Great cool.

TROY

20:40 Okay. So let's so, so what I think are two two main things that are one, I... I don't like railing the whole bunch of people around dates but we gotta pick a date. It's like my least favorite thing to try and get all the right people at the right place because as you know, it's pretty complicated. So that one is a day. So if you want to look at when what dates work with them, those... those kind of maybe several within the last three weeks kind of the last two weeks of April on the first week of may, you want to just show up, send me some proposals... that would be great. And then the second thing I wanna do is kind of give you a draft of what we're thinking the agenda could look by.

MARIBETH

21:32 Sure.

TROY

21:32 And then very much use it as a straw man of like we think... we think we can do this, but like what about this and that?

--- *Small Talk* ---

TROY

21:42 And what about this topic having the list? You know, all those things? And then basically that would get then hopefully I would hope to have that done by early next week. And so then you would have at least two weeks if not longer, the prep for the.

MARIBETH

22:00 That sounds great. I would anticipate that we should probably block about four hours for an onsite visit. Do you think your team is going? It's... it's... it's a marathon, not a sprint?

TROY

22:16 Yeah. Yeah. I think we're divided up a little bit because there's some topics that are only really affects and small.

--- *Small Talk ends* ---

MARIBETH

22:21 Sure.

TROY

22:22 Groups, but yeah, I think... I think the court team is expecting. I think they're expecting a whole day. So if we're under that, they'll be... they'll be very.

MARIBETH

22:30 Okay. Alright.

TROY

22:32 Yeah, I mean, and I'll... I'll send it was, I mean, I'll start when I get, let me see this. You might have some thoughts and how long have to either show all these things. So.

MARIBETH

22:40 Yeah.

TROY

22:41 Pretty, it's expensive at the moment, but.

MARIBETH

22:46 Well, you seem like a pretty detailed guy, Troy, so I'm... I'm not surprised by.

TROY

22:52 My, yeah, maybe... maybe it's a pro and con, right? Like most gifts are also person.

MARIBETH

23:00 Yeah, for sure. I know, you know, like we discussed, obviously this is a, this is more of a committee decision. I, we talked a little bit last time on the call about what were some of the things that were interesting to you about BuildOps? And I know that you had kind of mentioned, you know, it's just a little bit of a... of a different approach between the two systems. But I guess is there anything since you've seen both that you know, would kind of have, you know, enable us to stand out from... from who we're going up against? And, you know, is there one that you're maybe leaning towards over the other at this?

TROY

23:42 I, you know, I'm kind of pretty equal. I mean, I think... no, I think, I swear, we... we, I actually even like back to my tail burlington. It's called. I scored everybody up and there was just like it's like one point difference between these two widgets out of the scale out of all the questions, it's not. And I think build out a slightly higher. And I think the main thing was what I've mentioned the just the integration between the forms app or not. But like just have to see that. So... the... I... I like... I like, no, let me say it this way. I think that's a very fair question to ask and I definitely want to give me feedback but I feel like I buy when you, I'm gonna mix up because it's really hard.

19198157996

24:33 Right.

MARIBETH

24:34 To...

TROY

24:34 Be honest, like I have to like look at the screens otherwise I get them like cross because it's so forth. So I'll be honest, I mean, they... they do have a working project module, I mean, but what I saw you guys, I mean, it was actually it was, I thought it was nice to see the development process. Does that shows a little bit about the intentionality you put it into do Matt, which I greatly appreciate it. And that was good to see some of the inner workings there. So, yeah, I mean, let me... let me give, let me give you both pros and cons. I think you're also, I'll give you some of our challenges and I think I'll give you plenty of materials to figure out how you use that... on both... on both addressing your mid potentially icon and then using a pro.

MARIBETH

25:27 That's fair that's fair. I appreciate that. I gotta ask, you know.

TROY

25:34 I do it. I just afraid if I, when it, I'm going to mix it all up again and then you'll be like, well, we don't even have that are like... whoops, wrong one.

MARIBETH

25:47 No, no, that's all good. That's all good. I know... I know you have very detailed notes out of curiosity, what... what was the kind of metrics are rubric that you use to... to score the five applications to narrow it down?

TROY

26:00 So that... that RFP you guys sent?

MARIBETH

26:03 Yeah. I wasn't sure you had a different score for each.

TROY

26:07 Yeah. I just went through and scored every line item against kind of side by side. And then I, you know, and some... some, you know, some, you know, and it was a short text or sometimes I'd go, you know, Google like go to your help site and I look up a thing and I read the helpdesk. Okay. That makes sense. And then I would score it... better because I use a lot of times they'll be like, I don't know and then, but that's... that's how I went through the process and it was pretty much, I think it's close enough in the air that process that I would say pretty much.

MARIBETH

26:43 Hello. Alright... alright. Cool. And then the other thing I wanted to ask you about is... references. So when do you want to connect with some of our customers? And I'm kinda what's important to you in that conversation? And I can kinda.

19198157996

27:01 Chewing...

MARIBETH

27:02 That up and align it with when you want to call.

TROY

27:09 Let me think about that.

19198157996

27:11 Want to be, I...

TROY

27:12 Understand what you're asking a customer that deal and do that. So I want to be very cautious. I guess we'll probably making sure I... I was actually thinking after the demos we do that. Yeah. Okay. And it was just like, you know, I was kinda we'll see what I'll ask. I'll probably ask a few people would be what they want to do it us, but I would like to do it as a no, you're ready to hire someone, you do one last check VS, I'm not sure. Let's check. So... yeah, I just want to be very careful with back. Has relationships are important and I will yours. Well, I'll say it that way.

MARIBETH

27:52 I appreciate that. Well, we're... we're ready whenever you are. We've got a deep well of customer references who'd been, you know, customers four, five, six, seven years. We typically like to connect prospects with our customers have been using for a really long time. But yeah, we can... we can revisit this conversation once we have the onsite great cool. I'll shoot you some times over and all the way kind of the document with your agenda and I suspect you and I might should hop on a call before the onsite to... to kind of drill down and kind of make sure that we're everyone's on the same page.

TROY

28:37 Yeah. Let me send you those gripped by I'm targeting the end of this week, at least... at least a draft version concerned and then you that, and then let's have a meeting to discuss it just to make sure it makes sense to visiting your, clarify the things thoughts or things you might want to change.

--- *Wrap-up* ---

TROY

28:55 I think that will help drive timing, Brazil understand like how much time on need for all that. And then we can have, we can have more meetings. So I'm gonna try and get this... this is I was just talking to people today like this is weird. It's just me on this call. So I'm gonna try and get the two more people. I think I'm gonna get the CFO is going to start joining us on these calls. And then I'm gonna ask, I think Shane is head of ops head about who's not technical title but close enough.

MARIBETH

29:26 Right. Yeah, I...

TROY

29:28 Like them to be on these calls as well instead of just me, it's just talking to the consultant, so.

19198157996

29:35 And I was like, no matter.

TROY

29:38 Well, I don't know about that.

19198157996

29:41 So...

MARIBETH

29:42 Let me just give you some prompts really quick because we have worked with consultants in the past. You know, absolutely nothing about the business that they're trying to purchase for. So I have.

19198157996

29:54 Hello? Hi.

MARIBETH

29:55 About about you being the only person on the call?

19198157996

29:58 But...

MARIBETH

29:59 You know, with the more the merrier.

TROY

30:01 Yep. Okay. Alright. Well, that sounds like a plan.

MARIBETH

30:05 Alright. And just a heads up. I'm actually out of the office from Friday through Wednesday, I'll be checking my email and stuff, but I'll be back in the office next Thursday.

TROY

30:16 Okay. That sounds good.

MARIBETH

30:18 All right.



19198157996

30:20 Alright. Well, I appreciate your time. Yeah... yeah.

TROY

30:25 Sounds good.

MARIBETH

30:26 All right. Have a great rest of your day.

TROY

30:29 You too.

MARIBETH

30:29 Thanks. Bye.

19198157996

30:31 Bye.

*The End*