



# Call with BME Inc - Tanner Staiger

Tommy Polcari with BME Inc  
Recorded on 7/17/23 via SalesLoft, 5 min.

## Participants

### **SERVICETRADE**

Tommy Polcari

*Associate NorthBoundary Account Executive*

### **BME INC**

Tanner Staiger

*Business Development Manager*

# Topics

<i>Type of work</i> .....	1:21
<i>Accounting integrations</i> .....	2:40
<i>Type of work</i> .....	3:02
<i>Purchase decision</i> .....	3:24

# Transcript

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

TANNER

0:00 This is Joe. How may I help you?

TOMMY

0:04 I call for Tanner, please?

TANNER

0:07 I'm sorry, I didn't hear what you said.

TOMMY

0:09 I'm calling for Tanner.

TANNER

0:11 All right. He is a technician in the field sir.

TOMMY

0:15 Okay. I'm sorry about that. Is there possibly a service manager I'd be able to speak to?

TANNER

0:19 Yes, hold on just a second. May I tell me who it is?

TOMMY

0:24 Yeah, it's Tommy pull Cary?

TANNER

0:26 Tell me, thank you. Hold on please.

TOMMY

0:30 Thanks.

TANNER

0:48 This is Brad. May I help you?

TOMMY

0:54 Hey, Brad, this is Tommy pull carry with service trade. Do you have a quick minute.

TANNER

0:58 Sure.

TOMMY

0:59 Thanks. I appreciate it. So, I'm not sure if you're familiar with service trade, but we have recently acquired Northboundary. So, Northboundary helps hundreds of mechanical contractors sell more service agreements, win more projects and I want to reach out to you guys to see, you know, if you're currently using a CRM on the sales side or what that process looks like for you guys?

TANNER

1:14 Okay.

--- *Type of work* ---

TANNER

1:21 Well, we don't really get into much project work. I mean, we don't have, a bonified Construction division. Most of most of the work that we do is going to be at the service level.

TANNER

1:38 You know, maybe a remodel, but nothing, you know, like design build or anything like that that's just not within our capabilities.

TOMMY

1:50 Gotcha. Okay. So, you guys are mainly focused on like service agreements and things like that.

TANNER

1:55 Yeah, I mean, service agreements and yeah, absolutely.

TOMMY

2:00 Gotcha. Okay. Well, that's exactly what, you know, Northboundary was designed for specifically to help out with the sales process for service companies and things like those service agreements, you know, tracking them, making sure that you're good customer engagement so that you're able to win more, you know, win more contracts and we win more service.

--- *Type of work ends* ---

TOMMY

2:20 And so, I'm just curious, do you guys have like a process that you're using to sort of track those things now?

TANNER

2:20 Huh.

TANNER

2:27 Yeah, I mean, we do have a Salesforce, that is actively that's actively going out and, you know, knocking on doors, talking to people, things like that?

*--- Accounting integrations ---*

TOMMY

2:40 Gotcha. Okay. Do you have a software that sort of helps track those service agreements and customers and things like that?

TANNER

2:45 Yes, yes, yes, we do.

TOMMY

2:49 Do you mind me asking what you're using?

TANNER

2:51 Right now? We are using global edge, which is davisware but we are soon switching over to BuildOps.

*--- Type of work ---*

TOMMY

3:02 Gotcha. Okay. So, you're switching to BuildOps for, the service side of things and like work orders prevented a maintenance, things like that?

TANNER

3:10 Correct?

TOMMY

3:11 Gotcha. Okay. Well, based on everything you're saying, I definitely think it'll be worth your time to take a closer look at Northboundary. You know, we are separate Northboundary is separate from service trade.

*--- Purchase decision ---*

TOMMY

3:24 So, you know, service trade and BuildOps, are sort of competition there, but Northboundary is kind of, it's its own separate thing that helps specifically with the sales side. So, you know, I definitely think it would be worth your time, to sit down with the territory manager for a quick 15, 20 minute conversation so you could kind of, I'll give you a little bit more information and see if that might be something that, you know, would work for you guys.

TANNER

3:34 Huh.

*--- Purchase decision ends ---*

TANNER

3:47 I'll tell you what that would probably have to go through the corporate level. We, we actually were purchased about a year ago.

TANNER

3:57 So, that would have to come from it is.

TOMMY

3:58 Gotcha. Okay. You by Ryan group, correct?

TOMMY

4:02 Gotcha. Okay. Yeah. The reason I want to, you know, reach out to you guys is because I know we were talking with, I believe it was Merrick incorporated and they were taking a look at Northboundary, so I wanted to, you know, reach out to you guys and see if you're kind of in the same boat that they were.

TANNER

4:15 Right.

TOMMY

4:19 Would you be the person that, you know, handles these sorts of things?

TANNER

4:22 I would not, like I said, that would all come from the corporate level.

TOMMY

4:28 Gotcha. Okay. Do you by any chance know who would be the best person to reach out to?

TANNER

4:33 That I don't know. I mean, we're still pretty new with Ryan.

TANNER

4:39 And I'm not really familiar, with their hierarchy.

TOMMY

4:47 Gotcha. Okay. Well, you know, I, if I followed up with you guys in a few months, just check in, you know, see how things are going?

TANNER

4:54 Yeah, if you wish.

TOMMY

4:56 Gotcha. Okay. Well, I appreciate you taking the time to speak with me.

TANNER

4:59 All right. Thank you.

TOMMY

5:01 Yep. Have a good one.

TANNER

5:02 Bye.

*The End*