Call with Samco Facilities Maintenance - ADAM SAAD

Lucas Meinken with Samco Facilities Maintenance
Recorded on 4/13/22 via SalesLoft, 17 min.

Participants

ServiceTrade

Lucas Meinken
SDR

Samco Facilities Maintenance

ADAM SAAD
Samco Facilities Maintenance

Topics

Transcript

ADAM

0:00 Hello? This is Adam.

LUCAS

0:01 Hey, Adam. This is Lucas. Mine came from service trade. How are you this morning?

ADAM

0:05 Good. How are you? Sorry. I was on my, on the other line?

LUCAS

0:07 Good.

LUCAS

0:10 No, you're fine. Not a problem at all. I gave her a buzz about an hour ago. I spoke to, I think it was a receptionist or someone and they said you run on the other line. So I wanted to give you a little bit of time before given that call back for you, but I wanted to reach out Adam about that demo request form you put in.

--- Purchase decision ---

LUCAS

0:24 I'm kinda get a little more information about your guys as business, a little bit about, you know, the work you guys do your current process, things like that and then kind of pull up some calendars, find a time that works good for both of us and I set aside that time to get you what my territory manager to show you the demonstration. Does that sound like a good plan?

ADAM

0:31 Yeah.

--- Type of work ---

ADAM

0:42 Yeah, that sounds good. That's actually what I was on the other line do and I reached out to three specific companies. Long story short. We are currently on curry, go work direct service management. Okay. We've been on then since 2018. We've

been the main reason why we kind of went with them and they're very inexpensive and they, a lot of our customers, we're currently on that platform or going to that platform.

--- Accounting integrations ---

ADAM

1:13 And since then a lot of left, some are still on there. We've made that platform work for its capabilities and we've we have a lot of workarounds for some of the things that we do. We did look at FieldEdge and 2019 as far as even going live with them for about two days.

--- Type of work ---

LUCAS

0:55 Okay.

--- Accounting integrations ---

LUCAS

1:36 Okay.

ADAM

1:37 She had her opinion and realized that it was not gonna work for us. So we pull the rains back on that one right away. Continued with curry, go for quite some time.

ADAM

1:51 Curry go right before. I think it was right before quoted him curry, go ahead. Another new software which sounded like it was gonna be like an upgrade from work track and it was going to have all these capabilities that we were, you know, kind of excited for kind of the things that we needed to do. We started to work with them and it turned out that they were basically.

--- Accounting integrations ends ---

ADAM

2:17 Building the platform on our backs like, well, it doesn't do this. We need to do this. We can make it do that. But we need to, it's gonna cost this much. And this is, you know, we need three months.

LUCAS

2:22 Okay.

LUCAS

_{2:33} Okay. This is everything you guys need it within. That was kind of just an add on feature that they were doing and they would have to kind of ramp that up for you guys specifically. Sounds like?

ADAM

_{2:38} Pretty much. Yeah. Yeah. Yeah. And there was, yeah. So, you know, we realize that right away that it, and it still didn't have some of the capabilities. We went then to Davis where, which we didn't go with their big global edge version. We went with division version, which is supposedly the way it was sold as a scaled down version of the global edge. They are on internet explorer. Still somehow they also, yeah, and we went live with them about three weeks ago after about a year's of sweat.

--- *Accounting integrations* ---

ADAM

_{3:18} And, you know, we put up, we had to do a lot of building of that system as well of ours on our side here. You know, there was very little that they did like, we almost built the system from scratch.

LUCAS

_{3:09} Yeah, that, that's enough about that.

LUCAS

_{3:34} I got you. They kind of gave you the Foundation and you guys kinda had a tailored specifically for yourselves. It sounds like.

ADAM

_{3:37} Yeah, yeah.

--- *Accounting integrations ends* ---

ADAM

_{3:40} Yeah. And it was, which is a good thing in a sense, but it was a lot of labor hours and a lot of like lot of legwork where I thought that they should be doing some of the things at any way we went live.

--- *Type of work* ---

ADAM

_{3:53} And, you know, I understand there's gonna be some things that we may have to change in order to understand or process flow. But the functionality of the system just didn't work. I mean, there were things that worked on the training platform that didn't work when we went live is simple enough as, you know, we're a service company if a technicians in the field and takes pictures of something, we need to be able to see that in the office and we weren't able to do that like that. I mean, I could name 10 other companies that could easily do that for us right now. I'm sure yours is one of them. But like that's one of those things, it's like if you can't do that like, sorry,

we can't use this service. So, so, yeah, so we did, I will not live. We did go back and look at FieldEdge again. It looks like they have upgraded some of the things that they do. Some of the things are nicer but there are some FieldEdge to me, feels more of a residential H, VC style platform.

LUCAS

3:45 Legwork. Yeah.

LUCAS

4:21 Yeah, okay.

LUCAS

4:32 Absolutely.

LUCAS

4:39 Yeah, that's a simple feature. That should be, it should be, it should be easier.

LUCAS

5:03 Yes. So I talked to a lot of people on FieldEdge, and I do know they are geared for the residential side, and I was just about to ask you Adam you guys are primarily commercial work, correct?

ADAM

5:09 Yeah.

ADAM

5:13 We are commercial it. So we are commercial HV AC, refrigeration and have food equipment repairs. So our main customer is usually a restaurant style or, you know, some, something for like a restaurant or a convenience store, I guess would be our primary customer. At this point. We are eventually sort of transitioning to do some residential work, but we haven't even marketed too much for the residential at this point because we're too busy on the commercial side and we just haven't pushed for the residential yet. We are going to be doing generator installs for residential. I'm hoping that we will be doing residential installs down in the future, but at this point, we are commercial business. We do preventative maintenance for a majority of our primary customers.

LUCAS

6:06 Okay.

LUCAS

6:12 Okay. And now is preventative maintenance kind of backup, the majority of your guys as business on that commercial fun?

ADAM

6:18 No, no, not at all. We just obviously if we're doing the idea is if we're doing a preventative maintenance for a restaurant that we're gonna then beginning majority if not all of service work for them. So we do try and push preventative maintenance for all of our customers. However that doesn't...

LUCAS

6:36 Okay.

LUCAS

6:41 So that service, where it comes along with it?

ADAM

6:44 Yeah, absolutely. So what we're primer, primarily a service based company?

LUCAS

6:46 I got ya.

LUCAS

6:54 Perfect. And I'm glad to hear that you guys are specifically on that commercial side as we are geared for commercial side that's kind of our early customers has the commercial side. We've talked to a lot of people that are on, you know, FieldEdge service tightened ServiceFusion, all those people out there, and they have, you know, I've been told that the, you know, that's kind of for a commercial work. And then they take a look at service trade and they see what an actual commercial built platform looks like and it kind of opens their eyes and they realized that they were using the wrong thing the whole time and they're definitely on the wrong side of that scale.

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

ADAM

7:25 Yeah. I mean, just, you know, one of the biggest issues we had with FieldEdge was, you know, you go to a customer's location and on a work order and you have to close that work order out. And then if you need to order parts, so you have to go back, it's another work order number and it's like 90 percent of our customers we go to them, we diagnose, and we don't necessarily even give them an invoice for the initial diagnosis.

--- Quoting ---

ADAM

7:56 We may include the initial diagnosis with the quote for what the repair is going to be. If they decide not to fix it, then we'll build them for the initial.

ADAM

8:06 Those kinds of things. We're just very noticeable with FieldEdge the first go around. And then even when we followed up with them recently, that's one of the things that they still hadn't changed, there's a lot of other things that nice where you can find visibly things on their website, you know, trackable flags and that kind of thing.

--- *Accounting integrations* ---

ADAM

8:27 So, like we've built three three of these programs pretty much over the last four years and we've looked at four or five of them were very familiar with how they work and functionality and all that kind of stuff. So, I think we'll know right away whether it's something it's gonna work or not work. I did look on your website. You were one of the one of the three that we're looking at essay when I think is one of the other ones service trade and I can't remember what the third one was. I don't know if they contact to be at BuildOps, I think was the third one. So we are looking at three of them. But like we're at the point where we might as well have just built one of these programs ourself and started selling them.

LUCAS

8:32 Okay.

LUCAS

8:45 Absolutely.

LUCAS

8:58 Okay.

LUCAS

9:11 Yeah. You almost want to take different pieces from each one that you guys have looked at and kind of have it sounds like kind of combine it into one that tailored for you guys?

ADAM

9:17 Yeah, we like, we could just build one that's gonna work for us.

--- *Type of work* ---

ADAM

9:21 And then we could just start selling these and we could start doing service work altogether. You know, we've thought about it but no.

LUCAS

9:29 I got you, Adam. Well, I think you're going to be real happy with service rain, man. We are, our platform is very user friendly, very, we have a lot of different add on features that kind have a 10 tailored specifically for your guys, his work, you're

kind of you're kind of business. But I'm what I wanna do to Adam, how many technicians do you guys have work in these jobs right now? I know on the form you filled out 18, is that correct?

ADAM

9:51 Yeah, it's actually 17 and I would say three of them are strictly preventative maintenance.

LUCAS

9:59 Okay.

ADAM

10:01 Three of them are.

ADAM

10:04 Directly hot side.

ADAM

10:09 And then the rest of them are HP, AC refrigeration. We do have a couple that are kinda cross trained. Our goal eventually is to get the majority of them cross train because it'll be a lot easier to send one technician to do two types of jobs and save on the travel. But we got old guys that are, you know, we have guys have been doing service food equipment, hot food equipment for 20 years and they're just not gonna alert for duration. So, you know.

LUCAS

10:28 Absolutely maximize their efficiency.

LUCAS

10:38 I got ya, kind of their bread and butter already. There are certain, there are certain ways.

ADAM

10:41 Yeah. And we have refrigeration guys. I don't want to touch a dirty greasy food these, you know, a fryer or anything like that. So, you know, I get it. We're pretty versatile. So, but so we have seven, 17 total texts. I'd say three of them are preventative maintenance and we got about... eight eight... indirect.

--- *Paper process* ---

ADAM

11:05 So in the office here... plus two that are kind of working from home. My mom and dad work from home. My dad doesn't do too much anymore, semi retired currently only because the, what, how we're setup, he does a lot of hands on share it with the preventative maintenance aspect, making sure work orders are printed and

created and the filters are ordered and I know a lot of that can be automated. So that's one of our goals, the other and my mom does a lot of the.

--- Type of work ---

LUCAS

10:59 And then three on the hot side.

--- Paper process ---

LUCAS

11:17 Okay.

LUCAS

11:34 Absolutely.

--- Accounting integrations ---

ADAM

11:41 Accounts payable. So.

LUCAS

11:44 Okay. I see. And now I know you said you got like you just mentioned you kind of want to automate that process in regards to looking for a new software. The other than that and kinds of other than those issues you've already told me about, is there anything else that's kind of top of mind for you guys like priority in regards to a software?

--- Accounting integrations ends ---

LUCAS

12:00 Whether that's you know, accessibility for your text in the field? Whether that's the billing process or, you know, anything that kind of stands out for you that I can tell my territory manager who you'll be meeting with just to focus in on for you.

ADAM

12:13 No, we just process for flow is a big thing.

--- Parts management (inventory) ---

ADAM

12:18 We're in between whether we want to track inventory, the trucks or not if it has the capability. We definitely would like to do it. But it's gotta be a simple process and it's got a it's got to make our life easier to where it's not taking us extra labor and time in order to do so.

LUCAS

12:41 Absolutely streamlining that process essentially.

ADAM

12:44 Because of it, yeah, if it costs, if it's gonna, yeah, it's gonna take us long or it's gonna take more labor to do. So. I don't think tracking it is worth it to us.

ADAM

12:56 The pro embedded a maintenance. I've already mentioned the workflow process is a really big one especially from the service thing.

--- Paper process ---

ADAM

13:02 You know, being able to the technicians to quote from the field, being able to prevent present, the quotes, also invoice from the field. A lot. I mean, I know a lot of these platforms like yours kinda does that, but we just kinda need to see it and ask some questions to make sure it's gonna work right for us.

LUCAS

13:24 Absolutely especially for your text out in the field, make sure it's accessible for them.

--- Purchase decision ---

LUCAS

13:28 And I'm Adam, one thing too is we have these demonstrations recorded as well. So afterwards we'll have that recording shot over to you can kind of show it to all your tax, anybody else who'd be using on the back end in the office or whatever they can watch it on their own time.

--- Dispatch ---

LUCAS

13:41 And kind of also see from a first hand perspective how the platform operates kinda the ease of it and how user friendly it is for you guys.

ADAM

13:49 Okay.

LUCAS

13:50 Alright. Now, let me, I want to pull up my calendar here. I'm gonna have you meet with my territory manager, Chelsea, she handles your I'm reaching out there and you guys are up in Michigan, just want to confirm that, correct?

ADAM

13:53 Go ahead.

--- Dispatch ends ---

ADAM

14:04 Yeah. So we service southeast Michigan. So we are actually located in livonia, but we service pretty much all the southeast Michigan. We head over to about the middle of the state.

LUCAS

14:10 Okay.

ADAM

14:17 Less than north of us.

LUCAS

14:20 Okay, perfect. Yeah. Let me look here. So Chelsea has a pretty packed schedule tomorrow and Friday next week or most open day would be Tuesday, the nineteenth. Are you more of a morning or afternoon guy? Adam?

ADAM

14:36 It really doesn't matter. I guess it just depends on the day, what day we looking at?

LUCAS

14:42 Tuesday, the nineteenth. So she has openings from 10 to looks like two o'clock so anytime within that, and once again, it would be a 30 minute Zoom calls what it's gonna be.

ADAM

14:54 Two o'clock...

LUCAS

14:55 Two o'clock for you. Alright, perfect. And then Adam, is it just gonna be you sitting in on this demonstration? Or would you like me to add anybody else?

ADAM

14:57 Yes.

ADAM

15:02 No, I'm gonna have probably both my brothers and maybe one of our lead technicians so he can visually see and ask questions from how it works, Mobley.

LUCAS

15:16 Okay, perfect. And then what I'm gonna do, Adam, I'm gonna shoot you over a calendar invite. So, the email I have from your demo request is the Adam es, at Sam co, FM dotcom. Is that the best one to get you at?

--- *Purchase decision* ---

LUCAS

15:29 Okay, cool. And then do you want me to add those other emails for the, your brothers as well as that lead technician on there in case they can make it or? Okay, not a problem at all. Adam. So what I'm gonna do, I'm gonna shoot you over a calendar invite for this demonstration on the nineteenth. Two o'clock we'll do all this information you gave me. I've been taking notes and stuff. So I'm going to relay that over to Chelsea. So she has kind of an idea of, you know, your guys is process what you're looking for kind of the business you guys do right now. She'll be able to tailor this presentation specifically for you kinda show you your wants and needs and...

ADAM

15:28 Perfect.

ADAM

15:35 Florida too.

ADAM

16:00 Yes, needed to repeat all this information. I'm coming back guess?

--- *Type of work* ---

LUCAS

16:05 Yeah, no, I'll make sure to repeat that. Are really that over to her that's one reason we like to do that too is just to maximize that time on the demonstration. Doesn't have to waste your guys as time, you know, trying to explain everything. And then I'm trying to figure out your business they could.

ADAM

16:14 Yeah.

ADAM

16:17 I guess that we built three or four leads. So we're pretty familiar with how they work and.

LUCAS

16:23 Perfect. Perfect. Adam. Well, I won't take up anymore your time today, man. I'm gonna shoot over that email right after this call for you. And I'll what I'll also do Adam, is I'm going to give you a buzz on Monday just to kinda confirm, say something pops up on your calendar at that time, two o'clock on Tuesday. We can kind of work around it then, but I'll give you that call on Monday. We'll touch base then and make sure everything's still good.

ADAM

16:24 Yeah.

ADAM

16:42 Alright. Thank you.

LUCAS

16:43 Alright, Adam. Take care. Enjoy the rest of your day.

ADAM

16:46 All right, you too.

LUCAS

16:47 Bye now.

The End