



ServiceTrade One Month Review

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Participants

SERVICETRADE

Charlie Riddle
SDR

OTHER

ITS

Cynth

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Transcript

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

CHARLIE

0:00 Hey, how's it going? Guys?

ITS

0:01 Not too bad yourself?

CHARLIE

0:03 Doing well, doing well. Do you guys have a good weekend? Yeah.

ITS

0:06 Yes, I think, did we have a good weekend? Yeah. Okay. Perfect. I don't know. It was a weekend?

CHARLIE

0:16 I had a particularly interesting weekend, went to New Orleans with my buddies for a bachelor party. So, it was.

ITS

0:26 Nice.

CHARLIE

0:26 It was like a different world completely down there.

ITS

0:30 Yeah. I still haven't made it there not even once for my first time yet. So that'll be interesting at some point.

CHARLIE

0:36 It was, I've been there before, but this is my first time as a kid and our first time as an adult... work. It. Yeah. So it was a bourbon street was interesting. That's for sure. Might be the dirtiest city I've ever experienced, but lots of amazing food and music. So I can't complain.

ITS

0:56 Nice.

CHARLIE

0:58 So, we've got Jeremy and Cindy here with us. Is that right?

ITS

1:02 Correct.

CHARLIE

1:04 Perfect. Anyone else we're waiting on?

--- Implementation and ongoing support ---

ITS

1:07 No.

CHARLIE

1:08 Okay. Well, guys, let's jump in. The purpose of this meeting is to do a one month review. So, you know, roughly, you know, six, eight weeks ago, I think you guys started or went live with service trade after coming out of onboarding. So, what I want to do here is I wanna make sure again and I use this one on that handoff call, but I wanna make sure that you guys have everything you need to succeed. Okay? Typically, how these go is like after the customer has been living and breathing and working in service trade for a month or two. All of a sudden, you come up with questions like, okay, I love this. I hate this. I don't understand this. I'm trying to do this, but I don't know if it works this way.

--- Purchase decision ---

CHARLIE

1:48 So really, I want to hear how your experience has been so far. I want to hear what questions you have, and I wanna make sure that you guys have a path to victory here. Moving forward. Does that work for you guys? Yes. Perfect. Well, alright, I'm gonna open it up with a big broad question. Have you guys been, how service, right?

--- Purchase decision ends ---

ITS

2:10 I don't have any problems or complaints and I think any questions we had were already answered weeks ago.

CHARLIE

2:21 Well, that's great. I went into this meeting.

ITS

2:26 And I'm really had like, I don't think I've got any problem. I mean... so, you know, your work descriptions that they put it in, can't be over a 1,000 characters.

CHARLIE

2:40 Okay.

ITS

2:41 But that I see is, you know, because they're plugging it into the memo, late location rather than... into the labor line. And the labor line supports 4,000 characters, but the memo only supports a 1,000 and it's not hard to do, you know, visit and the return visit and... hit a 1,000 characters. I just like all should be made aware that the workaround for that is to put that work description up in the labor lines and.

CHARLIE

3:14 Separate the labor out.

ITS

3:16 Just telling my, yeah, I told her.

CHARLIE

3:21 What you're trying to accomplish Jeremy, is that you just want your text to get their Nelson.

--- Accounting ---

ITS

3:26 No, not an accomplishment. No, don't worry. We already figured it out. I just saying you guys have a 1,000 character limit that you should probably let people know that exist when you push the invoice into Quickbooks, right? It rejects it. And nobody really knows what those codes mean in your text support.

--- Invoicing ---

ITS

3:49 So it can't be over a 1,000 characters, number one and you can't ever have the same part twice that's not in your inventory. Quickbooks doesn't like that either. But I mean, other than that, those are Quickbooks, but those are your API to Quickbooks. But service trade, I don't have a problem with.

--- Invoicing ends ---

ITS

4:09 I really don't have anything negative or anything input wise... to say. I think we've got it working and figure it out. Would you, what do you think? Cindy? This is my problem. Bye now.

CHARLIE

4:28 Yep. I wanted to, I want to go back to that scenario you were just talking about like where your text put their notes and I want to understand that a little bit better because... I think I may have an easier solution for you. I don't my initial impression is that putting your descriptions on the labor items is really not going to be sustainable. But I, before I like tell you do something wrong, I want to understand your, what you're trying to accomplish on your, you know what I mean? No.

--- Invoicing ---

ITS

4:58 Okay. Your job, they put their comments and then you make your invoice on your invoice, you carry all your comments over. Well, if those comments are over a 1,000 characters, when you push the invoice into Quickbooks, it rejects it period because the memo field in Quickbooks online won't support more than a 1,000 characters. So it's a Quickbooks limitation. So you have to go through...

--- Quote templates ---

CHARLIE

5:26 Cut your.

ITS

5:26 Labor into two lines and then put, you know, like the, on the fourteenth, they did this description and on the fifteenth, they did this. And because the parts lines were, or the parts line description and Quickbooks will take 4,000 characters. So, so it's substantially better. And that's where HouseCall used to put the work description is right under. So you'd have one hour of labor or whatever. And then your description would sit right under it in Quickbooks online.

CHARLIE

6:03 Yeah, I don't know if I could, I don't know if I can affect change on the Quickbooks?

--- Invoicing ---

ITS

6:08 No, no, no.

CHARLIE

6:09 Yeah, yeah.

ITS

6:10 Literally can't but I'm just saying if anybody ever calls, that is the solution that they're solution to me. As I did need to back up the calls. I didn't need to push my invoices over to Quickbooks was essentially his solution and that solution was not a legitimate for me and I didn't want to hack up the work description and not have it match in Quickbooks. So, the right solution is just copy one, split the labor and a half

and send it over into Quickbooks because you've already invoiced everything. So it's just a Quickbooks thing. So you've got it there in case of the systems ever go south. And that's what he said. He's like, well, why do you need to push the invoice?

--- Invoicing ends ---

ITS

6:52 So we'll just in case if I ever separates west systems, it's in Quickbooks. She's like, well, you can ask for all your data at the end. Well, how about how to do that? I just wanted to Quickbooks. So like I said, it's not something you guys can fix it's. Just a workaround that should probably be shared.

--- Customer engagement (quoting and invoicing) ---

CHARLIE

7:11 No, that makes sense. Are you, what invoice are you presenting to the customer? You presenting the service trade invoice with that invoice link? Or are you sending out? Okay, good. Okay. No, that, that's the important thing. Yeah, if you.

ITS

7:25 You got.

CHARLIE

7:26 All that information wrapped up in a nice neat boat there.

--- Invoicing ---

CHARLIE

7:29 That sounds like the issue is getting the same level of visibility on the Quickbooks invoice and spoiler, alert the Quickbooks invoices, not gonna have, you know, the best time grabbing in all of the.

ITS

7:41 Hello?

CHARLIE

7:41 Hello?

ITS

7:42 And the other thing, the other problem that, yeah, I think the other problem too if you guys were coated for regular for like Quickbooks decks desktop, which has far more limitations then Quickbooks online.

--- Accounting integrations ---

7:55 When you guys pick that connector there, there is more flexibility in the online version and the desktop, but it's like they built it safely for the desktop. But anyways, we're getting completely sideways, any ways, what else we've got?

CHARLIE

8:12 Hello, I took a look at your old account before I hopped on this call and I've got the ability to kind of go on the back end and see how you guys are engaging with the platform.

--- Accounting integrations ends ---

CHARLIE

8:23 And I took a look at these graphs but I made and I'm not, I'm gonna breeze through them right now because I'm gonna save this for a meeting later this year. Okay? Where we're going to dive into the weeds. But this is, you know, on all accounts, I'm seeing great engagement.

--- Quoting ---

CHARLIE

8:39 Okay. On this graph. I'm seeing that you're creating quotes. Okay? On this graph, I'm seeing that you've got a 65 percent quote approval rate which tells me that you're sending the quote, your customers are engaging with it and you're getting that upsell right right here. I can see you're creating a bunch of jobs and your most create a job as a service call.

--- Invoicing ---

CHARLIE

8:58 I can see your invoicing out of service straight and invoicing pretty well. Okay, your service call right here, which is by far your most created and most to you too. Pipes, on average, it takes you five days to invoice that from the moment the job is created, that's fantastic.

--- Customer engagement ---

CHARLIE

9:15 That tells me that you guys have a comprehensive understanding of the entire workflow from the inception to finish. That doesn't mean there's not stuff to tweak and iron out, but you guys have got okay coming down. You guys are your tax or creating work acknowledgements. Okay. 100 percent of the time on install jobs, your talk to your creating a work analysis on service calls, 63 percent of the time you're types are creating working arguments out in the field that's amazing.

--- Quoting ---

CHARLIE

9:43 Okay. Right here, I can see we're looking at our tex adding attachments. Are they sending invite notifications? The big one, this purple one is, are they creating deficiencies and look at all these graphs skyrocketing to 100 percent that's fantastic. You guys are your service calls, but there's one thing I would point out to you guys is that your service calls, yes, your tax or creating an meaning taking photos, videos, audio memos, all that good stuff.

--- Implementation and ongoing support ---

CHARLIE

10:11 But I want them to add more efficiencies on service calls. That might be my only, you know, poke for you guys here. And I can see that you guys are invoicing out of service trade. So I know that was a whirlwind later this year. Once you've been in it for six or eight months, we're going to dive into the weeds and like really break this stuff down but I just wanted to run through this will real quick because you guys are rocking and rolling seriously for a company that has only been live with service trade group few months.

--- Implementation and ongoing support ends ---

CHARLIE

10:42 This is fantastic data at this tells me that you guys have a core understanding of how this stuff works. So, I thought you guys are doing great. What else is, what else is going on? You know, how are the tax? How happy what does their feedback of they, you know, accepted this change and red rock and roll?

ITS

11:04 Yeah, everybody's working on it. They don't... yeah, they say it's a lot more labor intensive than I pictured on our end, but the texts are, I mean, they like it just the same, it, it's not a whole lot different than the other for them because remember, we came off of HouseCall. Yeah, we came off of HouseCall. So they already kind of had to do some of this stuff anyways.

ITS

11:35 Yeah, but that's a given in case you didn't hear. She said the only problem we're having is the assets but that's because it takes time to put it in and they don't really want to put it in and I don't blame them. Can you guys build Google went into it? Like build upstairs for adding assets?

CHARLIE

11:57 No, no. What Google Glenn's...

ITS

12:00 He don't know what Google lenses. Well, okay. No, it's like if you take a picture of a model and serial number and you run it through or a nomenclature, Google lens

will go through and pull the information and turn it into copyable text and then BuildOps.

--- Assets ---

ITS

12:20 You rate. When you went to add an asset, they would say, take a picture of the tag. It would pull back the model, the serial number, the voltage, the refrigerant type in it would plug it in to those fields. It was actually pretty cool type thing, but I don't know if you could get them to give up how they did it, but that would make things a little easier.

--- Accounting integrations ---

CHARLIE

12:44 Yeah, I think my gut reaction, you know, no, I don't know if any customers doing that or any integration we've made.

ITS

12:51 You spreadsheet and have them think about it.

CHARLIE

12:54 Yeah, but that being said, you know, we have an open API. So I'm sure there's a world where an integration could be made.

--- Accounting integrations ends ---

CHARLIE

13:05 Yeah. I, before I like promise you the world, I would want to.

ITS

13:08 I don't want you to promise me the world. I'm just saying yadda, throw that on. Are you guys have a list of, you know, features or future features or things that might be suggested? I think that would be, that would be pretty awesome to have that.

--- Forms ---

CHARLIE

13:23 Okay. Yeah.

ITS

13:24 I think you guys would get a lot more assets added out in the field.

CHARLIE

13:30 Yeah. So... we created another product here at service trade called the service forms.

ITS

13:38 Huh.

CHARLIE

13:39 And it's basically inspection software report crack and one of the features of that or is it kind of page the way and helps you with getting that asset information in there? And, you know, they can do a little bit of functionality with barcode scanning. You know, if you get to the point where you're like, well, I want to completely overhaul my paperwork and the way my text engage with, you know, PM checklist or inspection reports, you know, we can talk and I can show it to you, but I think that would be kind of like a 10 dollar solution for your one dollar problem if that makes sense.

--- Forms ends ---

ITS

14:14 Yeah. Okay.

CHARLIE

14:18 What else? What else is going on?

ITS

14:20 Not that's...

CHARLIE

14:26 Perfect. What guys that's great news if you're coming in here and at a loss for words for how I can support channel, I can help you. That's great news... and certainly that tracks with the data that I'm seeing on the back end, right?

--- Access to information ---

CHARLIE

14:42 Okay. Well, guys, that's all I have, you know, I'm confident that you guys know how to use the platform, you know, I'm senior tax using it and seeing your office staff use it, I think you guys are doing fantastic. You know, what else do you need from me?

--- Access to information ends ---

CHARLIE

14:55 You know, we can, if there's workflows that you want to go through, we, we've got some time. We can dive into that. But also if you want this time back, you know,

we can part ways now and regrouping a few months and do this again.

ITS

15:08 Yeah, because I really don't I mean, if you don't have any coaching things for me, then I feel like we're good.

--- *Deficiencies* ---

ITS

15:17 I mean, everything we needed text support has help with. And if not, we've gotten it figured out a deficiency wise. I mean, the deficiencies that we're still working on those. And there's some people that just don't even use them. It's more of a verbal thing. We call them why we, why we're there and they just tell us to fix it.

--- *Deficiencies ends* ---

ITS

15:38 We just make another call. So that's the only reason we don't track that deficiency all the way through. We're using that more so on the people that don't approve things as something when they come back later and say, hey, this isn't working. We can say, hey, look, we reported it to your three or four times but, you know, it is a tool that will use to alert will learn to use better.

--- *Deficiencies* ---

ITS

16:02 But right now, just using it probably kind of in a way that it's not intended because most of the time like I said, were there on site, we're working on something. We say, hey, this needs to fix. They say fix it. We don't have to report anything or create a quote or anything like that. They just say fix it... type thing. So, so that's why you don't see that one super high plus, you know, like Wendy's doesn't really care for it. We have to take it out of our system and put it in their system for them to even approve it. So it does no good on their site, either type thing.

--- *Deficiencies ends* ---

ITS

16:42 So I guess we don't we can't really use the tool as intended for some of these customers because they don't see... that part of it. There was nobody there that watches that part of it. If that makes sense?

CHARLIE

16:59 I'd rather be honest to say I'm not quite tracking with your than the VS yet.

ITS

17:04 Yeah. If you were here, you would get it. I just, but we are. But yeah, we're good. I really got nothing. I really do. Okay. Cool. So yeah, now you get a break?

CHARLIE

17:19 No, seriously, guys, you know, moving forward, please be vocal, you know, if there's things that you don't understand or have questions about, reach out to support, reach out to me.

--- Purchase decision ---

CHARLIE

17:28 If you feel like you need some face to face time to go through some workflows or to dive into the weeds on something, let me know. I'm happy to carve out time for you. It'll probably be another few months before I reach out and podium schedule another one of these.

--- Implementation and ongoing support ---

CHARLIE

17:41 You know, the next thing on the horizon is I want to do what's called an account help review with you guys, which is where we actually dive into the weeds on these graphs instead of just me kind of shot gotta get because is once you guys have been living in service trade for six or eight months all of a sudden, these graphs are going to be actually representative. Okay? And it's going to have some, you know, a nice history of data that we can dig into to see the trends and to see, okay, you guys are not going out of the park with workflows. One, two three, wait a second. You guys are not engaging with workflows.

--- Implementation and ongoing support ends ---

CHARLIE

18:12 Xyz, let's talk about why or if there's any value to that and all that good stuff. But now guys, you're doing great. Let me know if I can support you moving forward, but I'll let you go here.

ITS

18:27 Sounds good. Thank you. Have a wonderful day.

CHARLIE

18:29 Jeremy said they all take it easy, say.

ITS

18:31 You too. Bye.

The End

