



# Call with Expert Services, LLC - Dawn Jobe

Charlie Riddle with Expert Services, LLC  
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## Participants

### **SERVICE**TRADE

Charlie Riddle  
*SDR*

### **EXPERT SERVICES, LLC**

Dawn Jobe  
*Principal*

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# Transcript

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

CHARLIE

0:00 On, please?

DAWN

0:01 Expert services. This is Ashley.

DAWN

0:06 Mass, who's calling?

CHARLIE

0:08 Charlie with ServiceTrade? I've got a call set up with her right now actually.

DAWN

0:12 Okay. One moment.

CHARLIE

0:13 Thanks.

DAWN

0:17 Experts do it better. And with over 40 years in business, our experience speaks for itself.

CHARLIE

0:20 I believe it's just a disco call, for everything.

CHARLIE

0:27 Yes.

CHARLIE

0:31 All right, check with Nicole.

DAWN

0:39 This is Dawn.

CHARLIE

0:44 Hey, Don, Charlie ride at service, right? How you doing?

DAWN

0:48 Good. We are having trouble with our office line. So, I'm gonna transfer you to my cell real quick. Just bear with me over 40 years in business. Great about that. We are, the lines are going for about a minute and a half and it's hanging up on people.

CHARLIE

0:52 Okay. No rush.

CHARLIE

1:13 No worries. Can you hear me? All right?

DAWN

1:17 I, can you hear me okay?

CHARLIE

1:20 Yes, perfect. Well done. Thanks for hopping on this call. Really. What I want to accomplish on this call is just kind of like a discovery portion. I just, I know we met with you. I think late last year, I'd like to verify some information here. What's new here? What you're looking for? And then ideally get you a schedule for a demo later this afternoon, if that works for you?

DAWN

1:21 Okay.

DAWN

1:28 Right.

DAWN

1:44 Sounds good.

CHARLIE

1:45 Okay. Well, why don't, I start by handing the ball to, you know, what, what's on your mind? What caused you to reach back out? And, and what are you looking for here?

--- Type of work ---

DAWN

1:55 So, long story very short. We had decided to move to say when that was not working out for several different reasons, majority of it was speed and... it's more of a

residential application and we're strictly commercial.

CHARLIE

2:12 Yeah. Okay.

DAWN

2:15 So, we demoed with you all. My heart was kinda set on going back to our original group.

*--- Accounting integrations ---*

DAWN

2:21 Perfect were because we thought, they said they were gonna do a new fresh software. It's not gonna be that old nineties look. So that's where my heart was just from familiarity and it's honestly pretty rock solid. It does quite a bit from an accounting purchasing and service platform. We knew that their mobile web tech version was going to struggle, but we had made the decision to incorporate xi into it. So we thought, hey, we've got this from an accounting and service dispatch perspective. We're solid. We're gonna add this feature. Everything's going to be great. Life was good.

*--- Purchase decision ---*

DAWN

3:04 We were supposed to see the new version of perfect were in the next few weeks and got on a phone call with them on Friday and they informed us that they sold to BuildOps.

*--- Accounting integrations ---*

CHARLIE

2:39 Okay.

*--- Purchase decision ---*

CHARLIE

3:15 Takes...

DAWN

3:17 And we did demo with BuildOps last year, didn't even make it through the first probably 10, 15 minutes... of the phone call with them. It's just not a software we were interested in. And.

DAWN

3:33 Perfect were has shared that, you know, this is gonna be a two year event, but we all know when businesses are required, it doesn't always go that way. So I need to make the best choice for us. They meaning perfect where pull their implementation to integrate xi with perfect were, so we're not gonna make it the two years because the guys are struggling with the web version. So that's kinda where we're at, and that's kinda why I didn't give, you know, 100 percent last year because in my mind, I was pretty dead set that we were gonna come back over here, but... we really need to figure something out.

CHARLIE

3:42 Okay.

CHARLIE

4:00 Right.

CHARLIE

4:16 Yeah.

CHARLIE

4:19 What you said you did a demo with BuildOps? What was kinda the hold up? Was it just like the timeline of getting implemented or was there something about the platform that, you didn't like?

DAWN

4:31 So there was, a couple of different things. One, there was an issue with a licensing and I guess this is a good question for you as well. If you purchase a license.

*--- Purchase decision ends ---*

DAWN

4:47 Tech turnover sadly is high at times especially during the peak months and there is no grace for that. So if you pay for the tech all year long, even if they quit a week later.

CHARLIE

4:47 Okay.

CHARLIE

5:00 Okay.

CHARLIE

5:03 I will make a note of that and make sure Brooke knows. So you're going to be meeting with this afternoon. I don't know if I'd rather hit you with and I don't know than tell you something, and be wrong?

DAWN

5:08 Okay.

DAWN

5:12 Sure. Yeah.

DAWN

5:16 The other thing was we are the vast majority of our customers are property management companies and we are... the billing entity has to be made out to them.

--- Accounting ---

DAWN

5:30 So let's just say it's a UK building a section and care of tig. And so we have about a good, can you have someone called, Charissa? Thank you. They have a character limit and I'm not saying we need 100 characters for the billing, but it wasn't even enough, to cover the billing entities name, forget the care of even if the, a second address was used, I don't remember the count but I can't change how our customers, you know, require us, to have their invoices addressed. So that was a key thing.

CHARLIE

5:28 All right.

CHARLIE

5:35 All so.

CHARLIE

5:47 Yeah.

CHARLIE

5:55 Yeah.

CHARLIE

6:08 I'm on.

--- Recurring maintenance ---

CHARLIE

6:14 Is it sounds like they make the distinction between Bill two and ship to, is it both that the character limit was on or was it, the ship to?

DAWN

6:21 I think it was just, well, I don't know if it was the ship too, because the ship to really we would just put it Fort Worth.

--- Recurring maintenance ends ---

DAWN

6:30 It would be something small. It's the Bill to that, you could utilize address line too, but it's still exceeded. And this was one of the shorter customers that wasn't necessarily one that had and I'm not talking 100 characters by any means but it's something, you know, that I hate to say it's a deal breaker but we've got to find a way around it if that makes.

CHARLIE

6:46 Right, right.

CHARLIE

6:53 Yeah.

CHARLIE

7:01 No, we've got you covered. So, one of the reasons that we're made for commercial is that we do make that distinction between the Bill to, and the ship to, and again, to my knowledge, I've been playing around with, you know, with service trade for years and years. I don't know if there's a character limit maybe there is, but I've never once come across the problem of it, whatever that limit may be if there is one.

DAWN

7:08 Okay.

DAWN

7:22 Okay. All right.

CHARLIE

7:24 Okay, great. Well, I've got a couple of what I like to call it. Just 10 cent questions. I've been looking at the past notes for when you met with us last year, and I just want to confirm some things with you real quick. First of all, how many texts are you all running right now?

DAWN

7:37 Sure.

--- Type of work ---

DAWN

7:41 One four.



CHARLIE

7:45 Okay. Are they all?

CHARLIE

7:49 Service or are some of those guys do in Construction?

DAWN

7:54 We don't do any Construction now, we do some unit replacements. There may be two or three Construction jobs a year, and that is, it's just not at the top of our bread and butter.

CHARLIE

8:09 Okay. But so it sounds like the vast majority is hvac service, maintenance repair, is that accurate?

DAWN

8:14 Correct. Yes and plumbing, yes.

CHARLIE

8:17 Okay.

CHARLIE

8:19 Do you guys have recurring services meaning like PM, maintenance contracts that you guys need to manage?

DAWN

8:25 Yes, yes.

CHARLIE

8:27 Okay. How are you all managing that right now?

--- Invoicing ---

DAWN

8:30 In perfect. Where they've got a good little setup. Basically, they'll drop, we validate calls, end up on the dispatch board and then contract invoices and end up in the bucket.

CHARLIE

8:38 Okay.

CHARLIE

8:42 Okay. Perfect. What else? I'm looking through these notes, I see.

DAWN

8:51 I can't remember Quickbooks? Do you all integrate with Quickbooks? Is it a hassle to get things from service trade to Quickbooks?

CHARLIE

8:58 We do, we absolutely integrate with Quickbooks?

*--- Accounting integrations ---*

CHARLIE

9:04 We've got a native out of the box integration with those guys, but the integration itself takes about 10 minutes to set up now in terms of getting your data over there, that's gonna depend on what stay in right now, but we're gonna, you know, when you guys go with service trait, we'll have someone that literally hold your hand through that process and make sure it's clean and actionable.

DAWN

9:03 Okay.

DAWN

9:22 Okay.

*--- Accounting integrations ends ---*

CHARLIE

9:25 All right. I'm looking through these notes and I see san saw in, is that what you guys are still using? Or is that what you kicked to the curb last time?

DAWN

9:34 That's what we kicked to the curb last time they have. They, I don't know what was going on. We proved that it was not our internet. They kept saying it's our internet because you would just get the spinning wheel. And it was like there's an internet lag, but you're talking two to three minutes before it would refresh the dispatch board. So, we proved wasn't our internet after time and time again, they finally admitted there was a bug. They said they do not have the money to rewrite the program. So that's why we just decided it was time.

CHARLIE

9:48 Okay.

CHARLIE

9:56 Right.

CHARLIE

10:09 Okay. Yeah, that...

DAWN

10:11 They're just smaller residential companies where we had an abundance of history and it's not that there was a whole bunch of graphics, but I mean, our guys, we do ask them upload pictures and that's about the time in the afternoon that it would really get slow when there was a lot of uploads going on, I guess.

CHARLIE

10:24 Well.

CHARLIE

10:30 Yeah, yeah.

DAWN

10:33 And I'm part of the change and we were thinking this was gonna be, you know, for a long time. So it hurts to have to do this, but.

--- *Type of work* ---

CHARLIE

10:38 No worries.

DAWN

10:42 Yeah.

CHARLIE

10:44 No, tell me.

CHARLIE

10:48 You guys are all commercial, but you do work with a lot of property management companies, is that accurate?

DAWN

10:55 Correct. So, a building typically is owned by a guy in California, for example, they hired a property management company local, and there's tenants in the space. Sometimes we work directly for the tenants and we work for the property manager. So we have to set up obviously two different customer accounts.

CHARLIE

10:56 Okay.

CHARLIE

11:13 Okay. Would you say that's? The majority of your business? Like do you work for other, you know, like hospitals or schools, or, you know, other direct? Okay, perfect.

DAWN

11:23 We do. Yes, yes, we do.

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

CHARLIE

11:29 All right, don't. Thank you. I feel like I've got a good understanding of where you guys are at and what you're looking for?

CHARLIE

11:37 Go ahead and pull up your calendar here. I'm looking at later today.

CHARLIE

11:43 Can you do two PM Central Time?

DAWN

11:47 I can.

CHARLIE

11:50 Okay. I'm going to.

CHARLIE

11:54 I should make that note two PM central. I'll shoot you a calendar invite here in just a few minutes when I get off.

DAWN

12:00 Okay.

CHARLIE

12:01 Now tell me what, what's gonna make the difference here. So, you know, you're a little bit of a unicorn here. You've already seen service trade. You know, you know, when you're meeting with Brooke, you know, she, if you want, she can start from ground zero, but that seems like it might waste some of your time. Like what, what's gonna make the difference here on this demo? What do you need to see?

DAWN

12:21 I need to, and I appreciate that. And I, and I wanted to be truthful that I kinda had, you know, I was just, I don't wanna say blowing it off, but I didn't give it 100

percent last time just to be transparent. So I need to see what the batch board looks like.

CHARLIE

12:31 Got it.

DAWN

12:37 Purchase orders that's gonna be key.

*--- Access to information ---*

DAWN

12:39 How do we issue purchase orders against jobs? Or if it's just truck stock or a tool account... and how that information gets over to Quickbooks? Another key thing is the mobile app, I'm being told by xi that you'll there is an integration. But my question now is gonna be, how is your mobile app?

*--- Access to information ends ---*

DAWN

13:06 And why would, if it's good? If it's robust, why would you need to xi integration or why would we recommend? I guess if that makes sense?

*--- Access to information ---*

CHARLIE

12:56 That we?

*--- Access to information ends ---*

CHARLIE

13:13 All right.

CHARLIE

13:16 Okay. I am not familiar with X. Oi, I've heard of it, but I don't know, I mean, I'd rather.

DAWN

13:21 So basically, yeah, and it's from what I'm understanding we did a demo. It's great. And basically, it's like it's only for the technicians. Mainly, it's they call it like curve to curve and it's almost like a workflow here's your work order. So somehow that link gets put into a service perfect, where that's how it's built out or what have you, but...

CHARLIE

13:42 Huh.

CHARLIE

13:46 Right.

--- Assets ---

DAWN

13:48 You, can you get your address and then obviously management, what set up workflows? You can, you've got upload a picture before you can add your notes. And before you add your notes, you've got to add your time, so it won't let the technician go to the next step until the previous task has been completed.

--- Assets ends ---

CHARLIE

14:08 Okay.

DAWN

14:09 And on their website, it says all recommended. So not sure. And apparently there's a full integration what I verified with them. But my question would be, do we even need to go that xi route if your mobile app is robust enough?

CHARLIE

14:24 Yeah. I mean, again, I haven't seen X, why this is the first time I've heard a description like that of that, you know, my gut saying no, you're gonna take it to the curve. I don't know of a single customer that uses something like that in conjunction with ServiceTrade. Our mobile app is gonna cover all those bases, right? So, from dispatch to job history, to making quotes, or invoices, if you want them to do that, it's gonna cover all that stuff. I can't imagine why they would need something else, but again, take that with a grain of salt. Take a look at it at the demo, and definitely bring that up with Brooke.

DAWN

14:59 No.

DAWN

15:03 Yeah. And I'm gonna forward you this e-mail just so you can see it too, just for your knowledge or whatever. But sounds good?

CHARLIE

15:11 Yeah, please. Please shoot that my way, and I'll pass that on.

DAWN

15:15 Okay.

CHARLIE

15:18 Cool. Well, Dan, thank you so much for your time. Be on the lookout for a calendar invite coming your way.

DAWN

15:26 Perfect.

CHARLIE

15:27 And again, timeline, is you're looking to make a decision by next week? Is that what you say?

DAWN

15:32 We're really wanting to spend some time this weekend? We're I don't wanna make a decision in haste, but we do need to do something. Our tech are kind of.

DAWN

15:45 They're struggling right now, so we need to do something.

CHARLIE

15:49 Yeah.

DAWN

15:50 Sooner than later, so.

CHARLIE

15:51 Actually, I was just about to get off the phone, but what do you mean when you say your techs are struggling right now? Like what are they going through?

DAWN

15:59 So, perfect. Were, the, one of the reasons why we decided to go ahead and jump into perfect were right now is because we were gonna do the exiting perfect. Where does not have an app. So they have a website for the text to log into to add their notes at their time.

--- *Deficiencies* ---

DAWN

16:21 They've admitted that there's problems with it. Text will add notes, add pictures, it'll save this time, but not next time.

DAWN

16:30 There's a lot of issues with that, and at this point, they said they're not putting any more money into it because of the sale. So that's why we were just going to... use

the xi with the perfect war for a while until we got till summer, calm down and at least get our guys going even though there was not an integration.

*--- Access to information ---*

DAWN

16:56 But, I think that's just gonna be too difficult. I don't know that we want to stay with perfect work. So we don't know what they're gonna do if they're not even gonna fix a few things from a web tech from. I don't even want to call it a mobile app because it's really just their, it's just a website they created.

CHARLIE

16:45 So...

CHARLIE

16:59 I...

CHARLIE

17:15 Okay. Yeah, that sounds stressful.

*--- Access to information ends ---*

CHARLIE

17:18 And so right now, you're actually using X, document notes, but then someone else has to do double data entry to input that into quick bars, right?

DAWN

17:26 That's what was going to happen. We were actually set up to start that this week, but then they pull the integration. So now we're kinda left limbo.

*--- Paper process ---*

DAWN

17:36 That's why we were wanting to make a decision pretty quickly because the guys in the field are stressing and that's the last thing I need them stressing over. I mean, it's a significant amount of time we're losing because they'll have valid notes. Well, of course, they're not gonna wanna take that much time a second time to add them again.

CHARLIE

17:34 Okay.

CHARLIE

17:37 Got to.



CHARLIE

17:58 Yeah. Okay. Cool. Well... Don, thank you for letting me pick your brain here. I've been taking notes this whole time. I'll pass that on, be able to look out for that calendar invite. And again, we said two PM.

DAWN

18:08 Okay.

DAWN

18:13 Yes, sir.

CHARLIE

18:14 Central all right, cool. Give me a shout in the meantime. If you have, you know, any questions or if there's any other like big thoughts that you have that. Hey, I got to see this on the demo?

DAWN

18:26 Okay.

CHARLIE

18:27 But...

CHARLIE

18:29 Other than that, I appreciate your time and we'll see it at two.

DAWN

18:33 Thank you, sir. I appreciate it.

CHARLIE

18:34 Thank you. Have a good one.

DAWN

18:36 You too.

*The End*