



Call with Control Service Center - Theresa Mejia

Brooke Caskey with Control Service Center
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Participants

SERVICETRADE

Brooke Caskey
Territory Manager

CONTROL SERVICE CENTER

Theresa Mejia
Office Manager

Topics

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Transcript

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THERESA

0:00 On, I can I help you?

BROOKE

0:13 Hey, Ken. This is broke calling for Theresa.

THERESA

0:16 Just one moment please?

BROOKE

0:18 Thank you.

THERESA

0:24 This is Theresa.

BROOKE

0:26 Theresa, I work with service trade. How are you doing this morning?

THERESA

0:29 Hi, good morning. I'm doing well. How about you?

BROOKE

0:32 I'm doing well too. Is now still a good time to talk about your calls yesterday?

THERESA

0:36 Yes. Yeah. I tried to get my stuff done so that I could be pretty first thing in the morning. We have a bunch of stuff we do. Yeah. So I talked to, I talked to Jonathan first. He was available first and we talked about the fact that they were with service trade for a while and then they went over to BuildOps and then they went back so that's pretty remarkable. So they don't really have a whole lot of migration that they needed to do because they'd already been with them. So he really likes the deficiency issue. He likes. He said that's a great tool.

BROOKE

0:37 Okay, perfect.

BROOKE

0:47 Okay. Well.

BROOKE

0:55 Okay.

BROOKE

1:00 Hum. Yeah.

BROOKE

1:08 Yeah.

BROOKE

1:12 Okay.

THERESA

1:16 I asked him about the, how the text reacted, you know, he said the app is really good. It's a lot easier than the office app, which, of course, we knew... and he hasn't really, they haven't really seen any downtime. Let's see what else and that you guys started rolling out a bunch of upgrades in January. He told me that the project management is brand new.

BROOKE

1:21 Okay.

BROOKE

1:40 It is brand new. Yep. Yeah.

THERESA

1:43 Okay. Any, any bugs or quirks? Anything we need to know about?

BROOKE

1:47 Not that not that I've seen and we're actively, you know, we have a whole project management team behind it. And so, with software, when there is a bug there's, usually someone on it really quick to fix it.

--- Pricing ---

THERESA

1:59 Sure. Absolutely. How many users do you guys have or how many accounts?

BROOKE

2:04 We have over 1,400 live accounts right now. So, when I say live, I mean, people that have gotten past onboarding?

THERESA

2:07 Okay. So, obviously.

THERESA

2:13 Okay. So, obviously, if there was a problem, you have 1,400 phone calls all at once. Okay. All right. Yeah, he said the problem with BuildOps is that they just...

BROOKE

2:18 Yeah.

--- Pricing ends ---

THERESA

2:27 Their company needed more than what they could do. So.

BROOKE

2:31 Okay.

THERESA

2:32 They just, they couldn't you know, I guess they just struggled with it for five months or so and couldn't...

BROOKE

2:38 Hey...

THERESA

2:39 Couldn't give them what they wanted. Let's see as far as the parts. He said that, they were trying to work with you guys to maybe integrate some software that they, that they're using called cojo. So... it was a good phone call, very nice guy. He said, you know, feel free to call me again if you need to. So that was a good call. And then a little bit later, I talked to mark. I'm sorry, I interrupted you.

BROOKE

2:52 Yeah.

BROOKE

3:04 No, I just said that that's great. But, yeah, but what is mark?

THERESA

3:06 Yeah, yeah.

THERESA

3:09 Mark said...

THERESA

3:12 That they basically, they switched over within a month. They, they did training in July and then, they were, everybody was live as of August first. Excuse me. He also likes the fact that the text can create the deficiencies on the job.

BROOKE

3:22 Okay.

BROOKE

3:28 Okay.

THERESA

3:28 And that customers can have their own fees, and mark up and things like that. He likes that it can be customized for each customer and support is really good. And then...

THERESA

3:42 Let's see Northboundary. What is Northboundary, he mentioned that is that the project management?

BROOKE

3:47 It's not so Northboundary, is, we acquired them back in November and what they essentially are is a new sales tool for winning new like preventative maintenance contracts. So, if you're able to create elaborate quotes for earning those new agreements and then you maintain them within service trade.

THERESA

4:13 Okay. So it's not something you already have preventative maintenance built in. This is just more of a sales thing.

BROOKE

4:19 More of a sales thing. Yeah.

THERESA

4:21 Okay. So probably nothing we would need. We don't do a whole lot of sales. I think, we told you that we don't have to market a whole lot because most of ours is word of mouth and just, you know, longstanding customers, you know, that we've had for so long. So they just keep coming back. So can't get rid of them?

BROOKE

4:34 Yeah.

BROOKE

4:42 Well, that's a good problem to have. But I think that I think based on our conversations that, you would be 100 percent fine keeping your quoting in service trade. And I know that we walked through that a few times with like quoting out a project and a repair and so hopefully that resonated with you.

THERESA

4:44 It is.

THERESA

4:58 Yes, yes.

--- Purchase decision ---

THERESA

5:02 And, and that's more of Kyle's expertise. He, he does the installs and all that. So, yeah, I think they're fine with that. I just, I guess overall, I just wanna make sure you know, that because we are, you know, obviously going forward with another meeting and everything. I just wanna make sure there isn't anything we're missing as far as, because the inventory thing kind of caught me off guard. I wanna make sure we're not missing anything as far as.

BROOKE

5:08 Yeah.

BROOKE

5:20 Yeah.

BROOKE

5:26 Yeah.

--- Purchase decision ends ---

THERESA

5:30 What tools we need versus what is in that? Is it the premium package? The one we're looking at the second one? Yeah, I wanna make sure that everything's included in their inventory. We, I think we're going to have Jack talked to Brandon yesterday. I think we're going to have one of your people that is familiar with Quickbooks talked to us on Wednesday about how that works and how we could make the inventory function. I think, you know, we should be able to, I can't see that would be an issue, but it'll be good to see how that happens.

BROOKE

5:38 Yeah, it's so.

BROOKE

5:55 Thank you.

BROOKE

6:02 Yeah.

BROOKE

6:06 Yeah. Absolutely. Her name is Diane and she actually, before she was a service trade employee, she worked for one of our customers and her entire job was working with accounting Quickbooks. And so she is a, really good resource. So, I talked to her yesterday about it and she'll be joining our call on Wednesday. Have you guys decided if you're definitely moving forward with Quickbooks?

THERESA

6:20 Huh.

THERESA

6:27 Great.

THERESA

6:33 Yeah, I can't see any other option?

--- Accounting integrations ---

THERESA

6:36 I mean, I don't think it's probably the least expensive option that we have. I know, I think you guys integrate with Sage as well. And I'm familiar with Sage, but I don't think, I mean, I know that that's a lot more. It's probably 10 times more than Quickbooks would be, you know, so.

BROOKE

6:36 Okay. Yeah.

BROOKE

6:41 Moment...

BROOKE

6:46 Yeah.

BROOKE

6:55 Yeah. And for us or the Quickbooks, Nate is the Quickbooks integration is native and it's free of cost where the Sage one does come with an additional fee, so.

THERESA

7:05 I see. Okay. That's good to know that's good to know. Okay, no, we haven't really discussed doing anything other than Quickbooks. Our accountant knows Quickbooks. I'm familiar with it. I think it's probably the easiest one to work with, you know, of all the ones that are mentioned, and we don't need a huge, you know, accounting system. I mean, as long as ServiceTrade is tracking most of it, what's happening and then sending it over, I don't think it'll be a big deal to handle inventory in Quickbooks. We can just download everything there. So, yeah.

BROOKE

7:10 Yeah.

BROOKE

7:22 Sure.

BROOKE

7:37 Yeah, absolutely. Yep. Yeah.

BROOKE

7:42 Yeah, we'll get that squared away on Wednesday.

--- Tech time tracking ---

BROOKE

7:44 And then in terms of just setting good expectations, the other item is the time tracking. Remember, there's the two options of the service time card or in service trade core, you can run the report of technician clock events and then export that into excel. And so, if the report to excel is fine, then we're good on that.

THERESA

8:01 That's fine.

THERESA

8:05 It should be fine. I mean, I'm working with timecards right now and I have to add them up manually and, you know, divide them into, you know, different projects and things like that. So, I can't see why we would need, as long as the tech can clock in on their app, that's all we really need because we don't need a separate, you know, anything separate to do that?

BROOKE

8:10 Yeah.

BROOKE

8:17 Uhhum, take care.

--- Tech time tracking ends ---

BROOKE

8:25 Yep. Okay. That's squared away and then a project management is included in premium and so that, that'll be good for you guys.

BROOKE

8:35 And, I think in terms of...

BROOKE

8:39 Covering what exactly you're getting under premium and then just figuring out the inventory. I think we are all squared away.

--- Purchase decision ---

BROOKE

8:46 I can't think of anything else that I would be missing and I'll be sure to fly collaborate with Jack before our next meeting too, but I think we're in a good position here.

THERESA

8:55 Yeah, yeah. I mean, you guys have answered most of the questions, all of the questions that we've had and I think the next meeting will just be really, kind of a follow up and iron some things out.

BROOKE

9:00 Okay.

--- Pricing ---

BROOKE

9:06 Yeah.

THERESA

9:08 So, yeah, I think we're good. There was one question I had for you and I'm trying to find yesterday, I was in there again all the time and I was looking at, okay, let me go back to this. Okay, under the premium. So it says best for 10 to 20 unlimited office users. And I'm sorry, you probably don't have it up. But the next thing it says select plus, what is that? What's select plus?

BROOKE

9:36 Let me in front of my right now, let me see. They must have select. So that's implying that you get everything with select on like right to the left of it. Plus all of this. If you see on enterprise, it says everything on premium plus. And so it's a funny way of wording it, but that's what that means. Yeah.

THERESA

9:48 Yes, yes.

THERESA

9:55 Yes. Okay. Yeah, yeah, because it's bold. So I thought I'm gonna click on that, nothing to click on. Okay. So the service portal by sales person, okay, multiple terms and conditions. Okay. Got integrations 24. Okay. Project management. Okay. Yeah, I can't see that, you know, we're not bigger than 20 techs.

BROOKE

10:03 Yeah.

THERESA

10:20 We don't really need geographical regions. You've already been through this. I mean, because you already recommended the premium. So, yeah, I think right in the middle, we're probably just fine.

BROOKE

10:25 Yeah.

--- Pricing ends ---

BROOKE

10:31 Yep. Yeah. I mean, again, we are a platform about growth. So maybe some day you might need enterprise, but, I definitely think that premium is a perfect place for you all the start.

THERESA

10:41 You know, we'd like to grow. It's. Just the problem is finding people, you know, that's the main issue that we have. We had a meeting yesterday with adp is who does our payroll and they've got this.

BROOKE

10:45 Okay.

THERESA

10:55 What I call the professional employer, a peo, you know, where you hire them to do most of your, you kinda outsource your HR to them, which is kinda nice. I do HR as well and it's nice because lately, you know, there's just so many new things like

here in Colorado that we have to add in to our manual and, you know, make sure that we're compliant on.

--- Tech time tracking ---

THERESA

11:18 So... where am I going with this? Remember it's early in the morning for me... even earlier for you. But, yeah, that sort of thing. I mean, it would be nice to have them do all that. But so back to adp... we, that's where we put payroll in. So all I really need are hours, you know. So I think that excel file would help.

BROOKE

11:07 Hey.

THERESA

11:46 You know, I think that would be enough. I mean, right now, we're doing it, everything's on paper. If they don't turn in their actual time cards, then they'll either e-mail us, you know, a picture of it or text as a picture of their time card and we have to rewrite it, then it goes through, you know, for approval.

--- Paper process ---

THERESA

12:04 And then, so it gets approved basically every day, the hours are allocated and then I take two weeks of that and plug it in. So a lot of a lot of double checking which is good, you know, but also a lot of paperwork, a lot of redundancies. So.

--- Tech time tracking ---

BROOKE

11:47 Perfect.

--- Paper process ---

BROOKE

12:12 Yeah.

--- Purchase decision ---

BROOKE

12:21 Yeah.

BROOKE

12:23 You mentioned that like hypothetically, you guys would wanna grow and hire more technicians if they're easier to find, which I completely understand because

everyone is saying that for the past few years, what do you think you're like ideal tech count is from where you're at today in a perfect world is?

THERESA

12:35 Hum.

--- *Type of work* ---

THERESA

12:41 We probably could use another five, you know, right now we're at, I think we're at 14. So, if we had like almost 20 techs, that probably would be good because, you know, it's hard keeping up with, the preventative maintenance. Those are the contracts that we, you know, can't lose the repairs, keep us, really busy especially like this time of year. So, yeah, I think that would be ideal for a company our size. You know, we're just a small family company, but they've been around for 40 years. So there's a lot that goes behind that, a lot of reputation and, you know, expecting, you know, people's expectations.

BROOKE

12:45 Okay.

BROOKE

12:52 Huh. Yeah.

BROOKE

13:00 Hum.

BROOKE

13:03 Yeah.

BROOKE

13:05 I...

BROOKE

13:09 Yeah, absolutely.

BROOKE

13:15 Yeah.

--- *Paper process* ---

BROOKE

13:22 Yeah. Well, one of the, I guess silent benefits of software that we've seen based on customer feedback is that when hiring technicians, especially if you're looking for,

you know, younger intelligent technicians having a good process for them to use is something that's gonna attract them, and keep them and that's something that we've seen across the board. And so, hopefully we're able to do that for you when you're looking for technicians and you're able to say, hey, like these are the tools you'll get to do your job sufficiently and that should excite them.

THERESA

13:38 Huh.

THERESA

13:41 Huh.

THERESA

13:44 Yeah, sure.

THERESA

13:54 Right... right.

THERESA

13:58 Yeah, I would hope so too. Yeah, I don't know, you know, like when they do exit interviews, I don't know that has been an issue, but maybe people just don't know to say that, you know, to say, well, gosh, you know, the paperwork is just a pain, you know, so I need to move on to somebody that's more automated. But absolutely, I think, the better communication that we can have, you know, the less.

BROOKE

14:10 Yeah.

BROOKE

14:14 Huh.

--- Paper process ends ---

THERESA

14:25 Possibility that you'd have like, a mistake or something that wouldn't be caught or miscommunication, or, you know, something like an error that, you know, could have been handled differently, maybe, and that was the result of that was maybe a, you know, termination or who knows? But yeah, I can't imagine that it wouldn't help.

BROOKE

14:30 Yeah.

BROOKE

14:36 Okay.

BROOKE

14:41 Yeah.

--- Purchase decision ---

BROOKE

14:45 Yeah, absolutely. Well, perfect. Well, so, I know for our next meeting, the initial focus is gonna be talking about Quickbooks and inventory once we're squared away on that, I know previously we had talked about coming to a decision next week. Do you think that's still a realistic possibility?

THERESA

14:54 Perfect.

THERESA

15:05 You know, I think so. I think so, I think we've got to get, the three owners on board, you know? So we're gonna be meeting on that. We've got a couple of big things that we're looking at right now as far as between the software and then, like I told you this peo, with adp. So those are the two big things we're working on right now, and I was talking to Brandon about it yesterday and he, they just want to be able to discuss and, you know, go back and forth. And so I think we've gathered the information that we need next Wednesday should be kinda, the last thing that we have to do so I can't see why either, you know, next week, maybe Friday or the following Monday or something like that. We, we should be able to make a decision on that and that's just for me. So don't take that with, you know, I'm just saying we're that close, you know, we're that close. I mean, we've kinda looked at what we need to look at. You guys pretty much do everything we need to do for that inventory. So as soon as we nail that down, I think, we'll be in better shape to make a decision.

BROOKE

15:16 Okay.

BROOKE

15:21 Yeah, sure.

BROOKE

15:51 Okay.

BROOKE

15:54 Yeah.

BROOKE

16:01 Okay.

BROOKE

16:05 Yeah.

--- Purchase decision ends ---

BROOKE

16:11 Perfect. Well, that's super helpful. It's just, it's helpful for Jack and I to know, you know, when we're talking to company timelines and setting a good expectations both ways. And so, I appreciate that. But all of that sounds good. I was taking some notes as we were talking and so, since Jack out today, I'll be sure to keep him up to date on everything when he's back on Monday.

THERESA

16:12 Okay.

THERESA

16:23 Huh.

THERESA

16:25 Sure.

THERESA

16:34 Okay. Tuesday.

BROOKE

16:35 But if you need anything else or have any additional questions for me, I can let you go today and then I'll look forward to talking to you next week.

THERESA

16:43 Sure. If anything comes up, I'll add it to the workspace or, you know, send you an e-mail whatever the workspace is nice because then everybody can see it. You know, I've been emailing you directly but it's just because we've been talking about references and things like that. But either way, whichever you prefer, if I think of anything that's going to involve everybody, I'll put it in that workspace or whatever you call it.

BROOKE

16:50 Yeah.

BROOKE

16:55 Yeah.

BROOKE

17:01 Okay. Yep. That's perfect. All right. Well, thanks, Theresa, and I'll talk to, okay, you too. Bye.

THERESA

17:05 Pretty cool. Okay.

THERESA

17:07 Yeah. Have a good holiday weekend.

THERESA

17:11 Thanks. Bye bye.

The End