Call with Protemp Mechanical, Inc - Darlene Johnson

Alec Ashby
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Participants

SERVICETRADE

Alec Ashby
Territory Manager

OTHER

Darlene Johnson

Topics

Transcript

--- Call Setup ---

DARLENE

0:00 Good afternoon, pro. Mechanical. This is Chris.

ALEC

0:05 Hey, Chris. This is Alec, a service trade. How you been?

DARLENE

0:08 Okay.

ALEC

0:09 Awesome, man. Well, I know we have that meeting setup for next week, Chris, and I was just trying to reach Darlene because she wanted me to call her just so I'm prepared for the meeting as Darlene. Chance.

DARLENE

0:22 Yeah. Yeah. Hang on one second for me, okay?

ALEC

0:24 All right. Cool. Thanks, Chris.

DARLENE

0:26 Yup.

DARLENE

0:47 Hello. This is Darlene.

ALEC

0:49 Hey, Darlene. This is Alec. How service trade, how you been?

DARLENE

0:53 Doing okay. Thanks. How about you?

ALEC

0:55 Doing good, doing good. Yeah, just, you know, it's new year. You know, the holidays are over. So now we're just back at it, right?

DARLENE

1:03 Yep. Yep. Never stopped.

ALEC

1:07 Yeah, I know the last week of the year, I was, you know, going pretty hard. I gotta take the first week off this year, which is nice. But now, you know, it's I don't know. I guess we got MLK day, but I'm probably gonna work that day, so.

DARLENE

1:21 We are taking that one off. So I'm kinda looking forward to that. That's why we requested Tuesday instead of next Monday.

ALEC

1:29 Nice. Nice. Yeah, I mean, I'm not, I don't have like a full day or anything like that. It's just more of like some meetings got scheduled and I was like, well, you know, I already took one week off, like I'll just do these meetings, I guess.

DARLENE

1:35 Yeah.

DARLENE

1:43 Yeah.

--- Call Setup ends ---

ALEC

1:45 But anyways, Darlene, the main reason I was reaching out, I know I emailed you guys about a month ago, and you guys got pretty busy over there. So you kinda want to schedule something around this time. So, I just wanted to kinda gather some simple information about your business just to make sure I'm prepared showing you guys stuff that's relevant to you guys that way when we have the meeting on Tuesday, it's not just some generic meeting. It's more tailored to you guys. Does that sound fair to you?

DARLENE

2:03 Huh.

DARLENE

2:10 Sure.

ALEC

2:12 Cool. So, just some kind of surface level questions since I know I haven't talked to you on the phone yet? Well, it seems like last time you talked to us, your tech count was six. Is it still six? Is it grown or do you know how many technicians you're at now?

DARLENE

2:27 No, we're still at well, including our owner who's in the field somewhat we have.

DARLENE

2:41 Yeah, we have six, and then our owners out there... some, somewhat. So, six text. Yeah.

ALEC

2:49 Okay. And the owner is included in that.

DARLENE

2:53 No, that would be an addition to so six six in the field, and then Marti?

DARLENE

3:01 Is out there somewhat, we're trying to get him out of the field, but he does kind of supervise.

ALEC

3:09 Gotcha. It seems like he's wearing many hats and I know. So it seems like Marti is kind of hands on owner. I just talked to Chris. What is he kind of what's his?

DARLENE

3:16 Yeah.

DARLENE

3:19 He is our operations manager. He is not in the field. He's strictly.

DARLENE

3:27 Operations, he's office parts, does some Cal, overseas equipment.

DARLENE

3:38 Billing?

DARLENE

3:41 Overseas, one portion of the technician, he kind of oversees them... but no, he's not technical in the field.

ALEC

3:49 Okay. Okay. Yeah. Typically operations managers are pretty good to get on these initial meetings because a lot of the benefits of service trade is usually things that those, you know, type of people will be interested. So, I think he'll like what he sees.

DARLENE

4:04 Huh...

ALEC

4:05 Now, as far as the project management, I know that was the...

ALEC

4:10 Webinar you guys initially signed up for? Do you guys do a lot of like three to six month projects or what was kind of the motivation behind joining that webinar?

DARLENE

4:17 No.

DARLENE

4:21 That would have probably come from Marti?

DARLENE

4:26 And I don't know what his motivation was with that. To be honest with you, we don't have long term projects.

ALEC

4:31 Okay.

DARLENE

4:36 The only long term projects we would have is installs, and they wouldn't go for that long unless we had multiple.

DARLENE

4:49 Multiple equipment.

DARLENE

4:52 Which we don't have a lot of that. We're pretty specialized in what we do even though we're in the refrigeration business. We're not hvac. We don't do hvac and heating, we work environmental test chambers, which is pretty specialized.

DARLENE

5:10 So, hvac doesn't really fit what we do.

DARLENE

5:14 It's the closest.

DARLENE

5:19 Because we're refrigeration, it's the closest thing to us if that makes sense.

ALEC

5:25 Yeah.

DARLENE

5:25 Because we deal in refrigeration.

ALEC

5:30 Okay. Yeah. That makes a ton of sense. I know... we work with a lot of refrigeration companies, but I know a lot of times I've talked to companies that do like specialized boilers or, you know, kinds of niche stuff. So, it's definitely somewhat common to hear. Hey, we do refrigeration, but we're not just going to a gas station. It's like something a little bit more sophisticated, so to speak. So, yeah, I get that... cool. Well, so as far as that, are you guys just mostly doing commercial work then? I assume.

DARLENE

5:40 Right.

DARLENE

5:42 Right.

DARLENE

5:52 Right.

DARLENE

6:01 All we do is commercial, we do not do residential.

ALEC

6:03 Okay.

ALEC

6:05 Okay, cool. So, yeah, we, you know, there's lot of alignment there because we work specifically with commercial service contractors. And then also, I'd probably say that our third biggest verticals refrigeration. Now, I get that you guys kinda do specialized refrigeration, but nevertheless, that is like one of the big verticals we work with, we work with like core refrigeration companies like that. So.

ALEC

6:30 Definitely see some alignment there, so to speak.

ALEC

6:35 Now, I don't know if you guys remember, but you did speak with us back in like 2019 to Michael, I think you guys at the time, like went with something else or something along those lines. Do you know if anything has changed since that meeting or do you remember that meeting at all?

DARLENE

6:48 Yep.

DARLENE

6:52 I don't remember that again would have been more of Marti but I think he's come a little way since then and he's now more open to a cloud based program where he wasn't as open to a cloud based program back in 2019.

DARLENE

7:12 Which you are cloud based?

DARLENE

7:17 So, he wasn't back then, and I think that's one of the, was the deciding factor for him at that time.

ALEC

7:25 Okay. And then, what are you guys running now? Is it still that thing he was using back then or have you kinda changed around a little bit or what are you guys using now?

DARLENE

7:33 We, we have reverted back to that because we went with another program last year that was not good for us at all. And it caused quite a bit of issue for us. So we left.

DARLENE

7:51 We're kinda doing a clean up from that and went back to another program, went back to that.

DARLENE

8:01 It was a mess. Let's just leave it at that. So we went back to that program that we were using because we need something.

ALEC

8:02 Yes.

DARLENE

8:13 And while just to get us through 2022...

DARLENE

8:20 And help us clean out and clean up the mess that we were in... and get the guys working with work orders and get us out of... like I said, the mess that we were in and get us through the year until we came out of it and here... to look for something.

ALEC

8:43 Okay. Yeah. I appreciate that transparency. And I know sometimes... looking at software, you know, at the end of the day, it's not something you purchase like every day. So, I know sometimes that it's sometimes a little bit difficult to evaluate softwares, especially if it's not something that comes around all the time. If you don't mind me asking what's the company used now? And what was the company you use that you had a bad experience with? If you don't mind.

DARLENE

9:10 The company that we're using is SmartService. It's not necessarily a bad system is just not as flexible as we would like it to be.

ALEC

9:15 Okay.

DARLENE

9:24 And I think primarily we would prefer something cloud based.

ALEC

9:30 Okay.

DARLENE

9:31 That's where we're just having some issues being, we need something that's a little bit faster for us and a little bit more. We're finding, I think cloud based gives you more cessibility wherever you are and things are not moving smooth enough for us.

DARLENE

9:50 If that makes sense?

DARLENE

9:55 Things are not flowing for us as quickly in and out of the office from the tablets back to us.

DARLENE

10:03 And I think on a cloud based system, it does.

DARLENE

10:09 What we used and which was not working well for us was built up.

ALEC

10:18 Interesting. Okay.

DARLENE

10:21 You've heard good things?

ALEC

10:24 Yeah, yeah, just being completely honest, I have, but to also be completely honest... I've heard that they're pretty aggressive sometimes.

ALEC

10:37 But, you know, it doesn't surprise me. I mean, at the end of the day, you know, a lot of it is just kind of... it's hard to say but yeah, I've heard good things, but it also doesn't surprise me because I know sometimes things don't work out or, you know, the sales process wasn't I'm not trying to, you know, whatever happened obviously, but, you know, there's a, we have a variety of reasons why they not worked out, but I did. I just being honest, you know?

--- Small Talk ---

DARLENE

11:08 And I'm gonna be completely honest too.

DARLENE

11:12 I'm gonna be. I'm gonna be your hardest sale. It's not gonna be our owner. It's not gonna be our operations manager. It's gonna be me.

ALEC

11:22 I appreciate that transparency.

DARLENE

11:26 Yeah, I am.

ALEC

11:27 As I'm sure you use it, you use it the most, right? I'm assuming.

DARLENE

11:30 I am, yep. And I'm gonna be, yup. And I'm the one that shut down build up and I'm gonna be your hardest sale. So, because I am the one that uses it the most and I'm the one that's gonna know at the most and I'm the one that's going to.

DARLENE

11:47 Pick it apart the most. So.

DARLENE

11:51 I'm the one that's going to be the one that, that's going to be dispatching it. I'm the one that's going to be invoicing it. I'm the one that's going to be doing all the INS and outs of it. So yeah, I know what Marti wants to see as far as the owner and I know what Chris is gonna wanna see as far as our operations manager, but I also know what I'm going to have to do to provide that for them and also provide the billing and technicians wise. So, yeah, I'm gonna be hard to sale and I'm not gonna go through what I went through with BuildOps. I won't do that.

ALEC

12:25 Yeah, I wanna, you know, put you through that. I mean.

DARLENE

12:28 We're still we're still cleaning that up. We're still, I'm still cleaning that up. So... yeah. So I still we'll get through your questions and I'll have mine so.

--- Small Talk ends ---

ALEC

12:41 Okay. Yeah, no, yeah. Feel free. Well, I guess.

ALEC

12:47 Just kinda shift gears a little bit what I guess, well.

DARLENE

12:49 Huh.

ALEC

12:53 Since obviously, it seems like it's going to be pretty important to you. I wanna start up with you. What are like the top three things you look for the software to do? Or just, I mean, I get that you want it to be cloud based and you want it to work, but is there like anything like top of mind as far as priorities that I can maybe show you guys Tuesday or what are you kind of looking for?

DARLENE

13:14 The, the functionality as far as the flow of the way the work orders come together, the way it works with?

DARLENE

13:28 With accounting, the way it works with time cards, the way it works. I'm assuming that it integrates with Quickbooks.

ALEC

13:38 Correct. Are you guys on desktop or online?

DARLENE

13:42 We're we have enterprise, but we are server based. We're not on cloud based. So, I'm assuming that we would have to put.

ALEC

13:50 Okay.

DARLENE

13:55 We would have to have one of our...

DARLENE

13:59 Our licenses open in the server to have.

DARLENE

14:05 Have I don't know how you work, you would have to have Quickbooks opened all the time since we're not on the cloud.

DARLENE

14:15 To run your software?

ALEC

14:18 Right. So, essentially now, I will say we do have a, I know about the Quickbooks integration, but we do have an in house Quickbooks expert. If we want to really get nitty gritty with it. And the first meeting goes well, we could definitely set up a meeting with her. But basically what, how it works is it's like a sync, so you can set it up to sync every 15 minutes, every 30 minutes, every 45 minutes. And all the invoices from service trade will sync into Quickbooks. Now, what most customers do is they like to invoice out of service trade because we have a lot of.

DARLENE

14:28 Okay.

DARLENE

14:48 Huh.

DARLENE

14:54 We won't be doing that. And how does that, how does that was one of my questions? Is we're not running accounting out of service trade? It, we're still maintaining our accounting out of Quickbooks?

ALEC

15:08 Correct. Yep.

DARLENE

15:09 Okay. So.

ALEC

15:11 Yep.

ALEC

15:14 You go.

DARLENE

15:16 Because we run a lot of portals and what, one of the main issues we were having is that.

DARLENE

15:24 A lot of the invoices were not being accepted out of any other software other than Quickbooks.

DARLENE

15:35 So, a lot of...

ALEC

15:35 You referring to like service channel or korego, or like those kinds of portals?

DARLENE

15:42 I've never heard of those portals.

ALEC

15:45 Okay.

DARLENE

15:45 Those are new portals to us. We deal with a lot of area or Oracle?

ALEC

15:53 Okay.

DARLENE

15:54 But they would not accept any, the... straight off of, we don't Bill out of SmartService, we don't build ups would not, they would not accept those invoices. So we build straight out of Quickbooks. And we have no issues whatsoever. So we would prefer just to keep billing straight out of just sync right into Quickbooks. And then Bill out of Quickbooks.

DARLENE

16:23 And that way it, everything stays smooth.

ALEC

16:27 Okay. Yeah. I mean, so if you wanna do that, we have plenty of customers that Bill out of Quickbooks. And there's still some, you know, customer post job reports. You can send the customer if you want. My recommendation would be for those portals. Whatever. I know, I've heard of, you know, a lot of different things about those portals, whatever is working for the portals. I'd probably just stick to that process, but maybe for the customer relationships where it's just kinda going directly to them, maybe consider it. But if you want to keep the whole thing streamline the same, I mean, you can absolutely do that. I can definitely show you guys that, but it's up to you guys if you want to invoice out of service trade or just invoice out of Quickbooks, so to speak.

DARLENE

16:33 Huh.

DARLENE

16:39 Huh.

DARLENE

16:51 Huh.

DARLENE

17:09 Okay. We can take a look at it, but I mean, it really depends how it works. So, like I said, we have had issues and.

DARLENE

17:20 We're just keeping it simple.

ALEC

17:23 Right, right.

DARLENE

17:29 Keeping, I mean, job costing time cards is another issue.

DARLENE

17:37 I would say.

DARLENE

17:44 What'd be another?

DARLENE

17:51 I'm not like, I haven't really looked to see how everything is done... having our forms come into service trade. I don't know if you offer.

DARLENE

18:03 The forms that we use and have used for years to have them PDF into service trade. If that's something that you do.

ALEC

18:17 Yeah. So we do that and there's kinda multiple ways you can do that. Are you guys doing like a billable PDF system right now? I mean, how are you guys doing that part right now?

DARLENE

18:28 Yep. Yep. So they like the...

DARLENE

18:34 Quote requests and things like that. The guys do in the field, some of the forms that they fill out on job sites and then they send them back into the office.

DARLENE

18:46 But if there is all part of the, they're all like separately in files on the iPad, but if they can be in service trade as Marti has this vision of everything in one box. So it would be within... one one area, which would be our service.

DARLENE

19:12 Our operating system being service trade would be, everything would be in there.

DARLENE

19:18 Rather than going seeking and finding where all these forms are, everything would be there. I don't know if you offer that.

ALEC

19:27 Yes. So, we do, in short, you can upload your forms to service trade. You can also apply smart rules to minimize the amount of things your technician would have to input. I could show you that as well. And, yeah, so they wanted like they, they'd fill it

out on Adobe, but it'll be hosted in service trade, and that's a little easier to show you rather than tell you. But in short, yeah, it would be in one app. They wanted to have to use multiple apps, so to speak.

DARLENE

19:53 Okay.

DARLENE

19:59 Okay.

ALEC

20:01 Like they would click on the form they click generate, they pull it up in Adobe and they wanted to just completely push it back to service trade. It's pretty straightforward.

DARLENE

20:01 So...

DARLENE

20:10 Okay. And those are the main things.

DARLENE

20:16 I think the other thing is when it comes time on our accounting, and when it comes time to actually Bill out.

DARLENE

20:25 Hopefully, that process on within service trade is straightforward and ease.

DARLENE

20:33 SmartService is a very easy process build up was.

DARLENE

20:38 Promised, it was easy. It was quite cumbersome.

DARLENE

20:45 And it shouldn't be.

DARLENE

20:47 I've been doing this for many years and it should not take as long and as many.

DARLENE

20:56 Step as it took to close out a work order and Bill it.

DARLENE

21:03 So, I don't know what your process is like, but that's gonna be a very important factor.

DARLENE

21:11 If it takes us, you know, 20 minutes to go through a work order to turn it into an invoice, that's gonna be way too long.

DARLENE

21:21 To close out a work order and process it. So that's going to be an important factor of what your processing steps are to take a work order, process it through and get it to an invoice to Bill it out.

DARLENE

21:37 So, that's gonna be... you know, how all that is set?

ALEC

21:44 Okay. Yeah. And I think you'll like what you see on that front typically, regardless of people, you know, go a service trade or not, typically, they perceive it as pretty streamlined, pretty simple.

--- Wrap-up ---

ALEC

21:56 The only thing I will say is I will, you know, defer a little bit to Diane about like the INS and outs of the Quickbooks integration. Like I said, I do understand it, but she was a former CFO at an old company out in Texas. So if, you know, you like what you see but you have some more questions about Quickbooks, we might need to set up a Quickbooks meeting if we get to that point, but I'll do my best to, you know, maybe send you some information or make sure that you're prepared or not you're prepared that I'm prepared to show you that.

DARLENE

22:03 Okay.

DARLENE

22:18 Okay.

--- Wrap-up ends ---

ALEC

22:29 And then just one more question based on what you said there. So I heard you say time card. Are you referring to technicians submitting time, getting into the payroll system? Like I know that can mean a little bit of different things like what are you kind of getting out when you?

DARLENE

22:31 Okay.

DARLENE

22:43 Right now, we have time cards on a very basic, we've used them for years and it's an excel spreadsheet that are their time cards. We haven't found anything that's been integrated within any type of an operating system that has been sufficient. We are a union shop, and we get audited at least three audits per year. And time cards are a huge part of that audit. That detail is key. And none of the systems that we have found has been able to withstand those audits. So we've always referred back to our basic excel spreadsheets for our time cards. So we haven't found any type of operating system that has been sufficient within the, to use the time card. And then I don't know if you support time cards within service trade.

ALEC

23:44 Yeah. So we actually have this add on product. It's relatively inexpensive for what it does. It's called service time card. Ironically, what it's meant to do is streamline the payroll process. So typically like technician can submit time if you guys need them to make adjustments or you need to approve it, you could do that, and then you can set it export to a certain payroll system. Do you guys have one, or is it a little bit different with the union? Or like do you guys have a?

DARLENE

24:15 We have a, we use Paychex?

ALEC

24:19 Okay. Yeah, I've heard of that one before. So if you're using Paychex, I'll double check, but I'm pretty sure we could export that, but.

ALEC

24:29 What I'll do with that Darlene, is I'll send you on our main website. There's a service time card like page. I'll send you that. It actually does a pretty good job. There's like four videos all pretty simple of kinda outlining what it does. I'll send it to you. Let me know your thoughts. And if you think it's something viable or something you guys would be interested in, I'll absolutely go make sure with my team that that's something we can export or how the process looks like with that. But as far as what you're looking for to like automate that, I believe that's what you're looking for, but I'll send you those videos just so you can kinda see for yourself if that's something that I testing because you can do it in the core platform of service trade. But service time card was built specifically for that functionality in mind to solve those kinds of problems you're talking about, if that makes sense?

DARLENE

25:14 Huh.

DARLENE

25:22 Okay. MM.

ALEC

25:25 Cool. Well, I know we've been on the phone for, you know, a little bit here. So I guess just the last question, I don't wanna take up too much more of your time. I know I kinda have an idea of what you're looking for, what's most important. I know that for whatever reason you had a bad experience with BuildOps. So I understand that it might be a tough sale for me. So I get that. But as far as mardi and Chris, is there anything they care a little bit more about that maybe you don't care as much about? I know you kinda refer to you kinda.

DARLENE

25:25 Okay.

DARLENE

25:47 Okay.

DARLENE

25:52 It's basically, yeah, basically the same thing as they.

DARLENE

25:57 Marti desires to see everything... in one box. That's what he keeps saying, everything in a box. So he wants all these elements... in one box. He wants to see quotes and all the forms and, you know, possible the time cards, he wants to see everything streamlined.

DARLENE

26:17 He wants... ease of that.

DARLENE

26:25 Job costing a factor, I think on Chris, and it would be mostly again with the.

DARLENE

26:36 The billing side of things where he comes into that.

DARLENE

26:42 It can't take like I said, if it takes 20 minutes to go through that, you know, it's not going to work.

DARLENE

26:52 The setup of the work orders, you know, again, I haven't taken a look at it to be honest with you. We were...

DARLENE

27:00 Way too busy trying to get through the end of the year and do all that clean up.

DARLENE

27:06 Of, of how things just play together. Really, we just kinda have to see how everything works together.

DARLENE

27:17 I think the work order into the invoicing into the final product, how the quotes work into that?

DARLENE

27:25 How that whole again coming back to that whole box of work order box of quotes, all the.

DARLENE

27:35 Our quotes, and then the quote the, that the guys go out, quote requests. And then the final product of the invoice is how all of that works together.

DARLENE

27:47 That's what they're kind of looking for is the whole… complete product.

ALEC

27:53 Okay. Yeah. And I do just want to confirm he's saying everything, but like accounting stuff, right? Like he's still gonna wanna do all those like fancy accounting reports and Quickbooks is just, he's looking for something that like from the minute you dispatch to the minute you invoice, it can handle that. But he's not looking for anything like to handle accounting. I'm assuming, right?

DARLENE

28:13 We've because we've any time the times that we have actually done a tried to do accounting out of an operating system, we've had Quickbooks crash.

DARLENE

28:29 As well as this last time, our vote is to stay out of doing anything with accounting within the operating system is to leave it separate.

DARLENE

28:41 So, we're voting to leave actually doing accounting to accounting and leave everything else to.

DARLENE

28:54 Not just keep them separate every time we, we've tried to do it, has crashed Quickbooks. And we're coming out of another crash. So we would prefer to keep it separate.

ALEC

28:57 Okay.

ALEC

29:07 Okay. So with that, you can either, you know, set it up as an integration, you can make it a manual. You can set it up as a sync or if you just would rather not even integrate and just enter it in manually. I mean, about 40 percent of our customers don't even really have an integration with their accounting system. So, you have a couple of options there, but I'll make sure to kinda show you guys your options. Really what I'm trying to get accomplished in the first meeting is just making sure, you know, we're checking most of these boxes. If there's any, you know, left over Quickbooks questions, I might refer it a little to Diane, but really, I just want to kinda take you from the minute you schedule something out all the way to... the invoice, so to speak. And do you guys do like a lot of preventative maintenance by chance or do you guys do more like reactive service calls or?

DARLENE

29:32 Okay.

DARLENE

29:45 Huh.

DARLENE

29:59 We do both. We do service, we do PMS, we do calibrations, we're in accredited lab. So we do calibrations.

DARLENE

30:08 We do installs, repairs, we do everything.

ALEC

30:13 Okay. Cool. Okay. Cool. Well, that was about it for you, darling. That's all I really had as far as the time card. Do you want me to just send that to you? Or do you want me to send it to the group is like that page specifically?

--- Wrap-up ---

DARLENE

30:27 You could send it. You can send it to all of us. Sure, yep, Marti and Chris would take a look at it as well, absolutely.

ALEC

30:31 Okay.

ALEC

30:35 And like, you know, if it gets to the point where we need to demo it, we can demo it. But most of the time when people look at that, they kinda have an idea if it's

what they're looking for, not, so I'll send that to the thread just so you guys have that. Like I said, it's about four videos, pretty straightforward, but if you have any questions about it, let me know. But otherwise, I'll look forward to talking with you guys next week, if you have any questions or if there's anything top of mind that maybe you didn't think of on this call that you want me to cover, feel free to send me an email between now and then, but I'll look forward to talking to you guys Tuesday. Okay?

DARLENE

30:44 Huh.

DARLENE

30:46 Okay.

DARLENE

30:55 Okay.

DARLENE

30:59 Okay.

DARLENE

31:11 Okay. Sounds great. Thank you so much. All right. Thanks. You too. Take care. Bye.

ALEC

31:13 Yeah, no problem. You have a good one. Okay. Have a great week. Bye.

The End