



ServiceTrade Review

Sarah Bartkus with Premier Airconditioning & Refrigeration, Inc.
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Participants

SERVICETRADE

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PREMIER AIRCONDITIONING & REFRIGERATION, INC.

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Transcript

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--- Call Setup ---

ALFREDO

0:00 Hey, Sarah. Sorry, one last second. It's just, I got a, I, all I have to do is sit down for a Zoom call and then I get.

SARAH

0:06 Totally fine. You're good.

SARAH

0:28 Okay.

ALFREDO

0:28 It's just, let me see. I just had a kid a few months ago. So any time my wife calls me, I think it's an emergency, you know, how?

SARAH

0:36 All congratulations.

ALFREDO

0:38 Thank you. Okay. Talk to me. How are you?

SARAH

0:44 What's good? So, my name is Sarah. I am your new account manager and I'm doing well. Thanks for asking. I hope you are as well and I hope you're getting some sleep with the new baby?

--- Call Setup ends ---

ALFREDO

0:55 Not much that's the thing. Do you have any kids?

SARAH

0:58 I don't I've had these kids but I do not have.

ALFREDO

1:02 Yeah, it's a real deal.

SARAH

1:05 Yeah. Is it your first one?

ALFREDO

1:09 Yup. And so it's just these past few days. She, she had been good, sleep wise for a while and then the past few days have just been pretty hard. So it's like, I mean, I know... that changes supposed to happen, but, it sucks when it's changed in that direction.

SARAH

1:25 Yeah, like I missed my sleep.

ALFREDO

1:30 Yeah. So thanks for taking the time. I'm curious, what is your role? Are you going to be like my point person for glitches and errors? Or I got.

SARAH

1:42 So close. So we have for our, when it comes to like glitches and anything like that, we have a support team. Have you been able to have you spoken to them or reach out to them before?

ALFREDO

1:54 I have, but it used to be. So what is their e-mail because the thing is that like for instance, today, we, so we use Northboundary, right? You guys just acquired them. And like today, we have a daily report, two daily reports that are supposed to be sent at six am eastern and they didn't come in today. So, like who would I?

SARAH

2:16 Okay. Yeah, that would be through support. So you would just do support at ServiceTrade, dotcom, super easy. And yeah, just send him a ticket. You know, if you have any issues or something not being answered or followed up with through them, then you can definitely let me know and I'll put some fire in there. I got you back, so.

ALFREDO

2:44 I'll see here just so you can see. So what's since I don't have you saved yet? What's your e-mail...

SARAH

2:54 My e-mail is Sarah S a R a H period Bart B a RTKUS at service trade dot com.

ALFREDO

3:07 Because that will help.

SARAH

3:09 Yep, can e-mail me whenever you would like. Calling hours are from nine to six.

ALFREDO

3:18 Perfect. So, so not support. So you'll be more of like a coach or something.

SARAH

3:24 Yeah. So I'll just be maintaining your account on like a kind of higher level. So just making sure that, you know, things are well. I'm looking at your account. And because you're only Northboundary, I don't have a lot of data on you guys, but, I did look up... it looks like you guys just renewed in just a couple of months ago. So if you.

ALFREDO

3:54 So...

SARAH

3:55 You know, so I'll be doing things like that. So maintaining your, you know, looking at your payments, making sure that, you know, everything's going good for renewal if there's any training that you need or anything specific, I'll be facilitating all of these things. So if you need any help, with your service, things like that, you would just contact me and I'll be your main point of contact from that type.

ALFREDO

4:23 Okay. So one thing is that one thing is that we have been interested in kind of what the improvements are to Northboundary, and I've been getting a lot of messages back from, I forget his name now, Dwayne maybe. But basically, he kept on saying like we're not gonna do that to Northboundary because service trade does that.

--- Pricing ---

ALFREDO

4:46 We're not going to have that because service trade does that. So I went online to look at the pricing for service trade. And if you could do just a quick analysis to see like what I'm paying now? And what if I'm paying 189 dollars a month for, I mean we're a small company.

SARAH

5:04 Any, so it says on here, you have 10 technicians. Is that accurate?

ALFREDO

5:08 I mean, we come and go, but the other thing is that it's he told me that we pay for salespeople or access to sales people. It's it's been a little bit confusing but yeah, we

have less than 10 technicians. And basically, we have Northboundary, a dispatch board, Quickbooks. And if service trade can integrate a lot of that, then we would be interested in just switching over to service trade because some things that we need are like project management help. And I know that Northboundary has project management, but it just doesn't do what it is that we needed to do, for instance, like you can assign a task to someone, but like they don't get an e-mail notifying them. And there's a lot of manual input. There's not a lot of just automation. There's not a lot of information on jobs other than the proposal. So, my sales team doesn't know like what's the status of the job? What's the latest of the job? Who, who was the last person to be on site? Because that's on a separate platform. So, one of the things is that if it's a similar price point, which I think it is, then if service trade has an abundance of bells and whistles that are more than what Northboundary does, then I'd be interested, in considering switching over.

SARAH

6:26 Sure. Yeah. Well, we, so Northboundary is more so like a, it's a tool or like an add on to service rates. So.

ALFREDO

6:34 ServiceTrade.

SARAH

6:35 Is a like, a hub or somebody was saying a basket?

ALFREDO

6:41 And then all...

SARAH

6:41 The items in the basket, we have lots of things. So Northboundary is one of them, we do have a lot of features and I would absolutely be happy to set you up with a consultation demo with one of our territory managers and they would be able to, depending on your needs with your company, they'll be able to walk you through the product, cater to your business and show you exactly what that would look like and give you a very accurate quote on what? Depending on what your needs are, what you would be looking at paying?

ALFREDO

7:19 Yeah. But is it, is that, am I reading it, right? That it would be 189 bucks a month for a company my size?

SARAH

7:25 Technician? Yeah, it's 189 dollars per technician. I think it is.

ALFREDO

7:32 Right. Okay. So per month?

SARAH

7:35 Per month?

--- Pricing ends ---

ALFREDO

7:36 No, no, then that would be, no, that be, yeah, no, we wouldn't afford that.

SARAH

7:42 Okay. I was like...

ALFREDO

7:43 No, no, no, yeah, I don't even wanna waste this guy's time.

ALFREDO

7:49 Yeah, no, no. Don't worry about it then. I mean, we just, it's I read it wrong. Yeah, we just wanted, I mean, that's the thing like what I talked to you. I mean, there's just these simple little types of tweaks that we need that honestly, every single time I asked Dwayne he was like, no, we're in Northboundary because ServiceTrade already does it. And I'm like, well, fuck man like you told me that when you sold me on this whole welcome to ServiceTrade, you're like and we're going to be able to optimize Northboundary in ways that Vince was not, Vince was the previous owner and basically the sole creator of Northboundary and I was like, man, you sold me on the fact that you were going to make this super impressive and it was going to be so much better and we're going to be in love and all this stuff. And then every single time I ask you, you're like, no, we're not gonna do it and I have the emails like there's just a bunch of knows. So at this point, like we might as well just go to a different company like, Jobber is the one that I wanted. I don't know if, you know, Jobber?

SARAH

8:47 Yeah, I'm familiar.

ALFREDO

8:48 Yeah. So Jobber is the one that I wanted because the community and they've been great and, they do fix things and they do change things and they do optimize. So like I know I signed a three year contract but honestly, my goal for the next three years is to figure out which other CRM to go to because Northboundary kinda sucks and nobody seems to care about it.

SARAH

9:05 Well, no. Well, actually contract to believe we are trying really hard. So what happened is we did take on, we did take it on pretty recently as, you know, and come to find out they had, no, they didn't really have anybody like working on it.

ALFREDO

9:25 Yeah.

SARAH

9:26 Yeah. So, we actually had to build a team and from scratch. They needed to learn how to, you know, all the INS and outs and coding and everything. And now we're finally like working on it. So it's you know, it's been a process and I'm sorry that, you know, things aren't quite sounds like you kinda feel like you're over promise and under delivered and.

ALFREDO

9:49 It's just, I wanna see, I would love it now that you're, my liaison. I mean, I get, these generic marketing emails from service trade and I don't read them because it's just, I, yeah, unless it's about Northboundary, I'm not gonna read it. Yeah, but I mean, the things that I've requested are so straightforward, from a programming standpoint, notifications, right? The ability to e-mail someone... you know, as far as job costing, or project management is concerned, like really basic things, that are already there but just need to be optimized a little bit. And the thing is that like I've kinda given up because I was like, okay, they just want to push me to service trade that's it, that's my understanding is that you guys acquired Northboundary? You're gonna make it annoying enough for us to have to move to service trade and then we'll just have to either decide to stay with service trade because it's the easier option rather than switch to a new CRM or we're going to have to go to a new CRM that's how I understand the business model of the acquisition. And I'm sorry that to be, you know, negative, on a morning like this, it's just, I mean, I said it directly to Dwayne. I'm like, yeah, man, this, it's not better for us. It's not better for us. It's not nicer. It's not. Yeah, you guys are great with ticketing that's awesome like but, and everybody's super nice, but the actual product itself... don't you know, don't know if I could say it's better or if it's gonna get better. And, yeah, I hear, you just acquired the company, but when I hear when Dwayne writes to me and says, no, we're not gonna do that because ServiceTrade already does that, then it's like, okay, well, then what are you gonna do to Northboundary, if all the optimization that we want in Northboundary is just gonna be in ServiceTrade.

SARAH

11:47 What exactly are you aside from project management? What else was there?

ALFREDO

11:52 Yeah, let me see.

SARAH

11:53 Where you're interested in?

ALFREDO

11:57 Was it Dwayne, what's his name?

SARAH

12:00 Dylan, I think maybe...

ALFREDO

12:03 TY.

SARAH

12:04 DYL a N. Yeah.

ALFREDO

12:13 Does Northboundary have dispatching abilities for service calls to log the calls, put? Put a technicians name on it, et cetera. He says, no, it doesn't exist because that's a core product solution in service trade.

SARAH

12:26 Yeah.

ALFREDO

12:29 Then.

ALFREDO

12:45 Sorry, it's just project planner... because I was talking to him. Okay, here we go... tracking budgets and POS for jobs. Like, can I just put in po numbers for jobs? Can I track hours of the guys on the jobs and the names of the technicians? And he says those are both things we do in our core products. So it's highly unlikely we'll ever duplicated in Northboundary. So literally, the three things that I've asked him for, like, can I just track POS on my jobs? He says, no, can I track because we have a po tracker, right? My, my operations manager has a budget and he starts subtracting from that budget. With every po, it is a simple excel spreadsheet, but I hate that I have excel Quickbooks dispatch board Northboundary. You know, everything is everywhere. So all I wanted was, is there a way in the job planner currently to put a po tracker? So that instead of him going to an excel spreadsheet and having to find it through Google drive, can everybody just go to Northboundary and do it? So, yeah, after I asked some of those three things, I was like, screw it, I'm just nothing's gonna get better. And I said this is very frustrating. I was under the impression during our call that you were going to be implementing new things in Northboundary. And now you're telling me that we would have to switch platforms to get the basic needs that we need. Okay?

SARAH

14:14 Yeah. Were you, did you like, what was the, like, what was your main motive for buying Northboundary?

ALFREDO

14:22 We needed a CRM?

SARAH

14:24 You know, you bought it, just the CRM capabilities?

ALFREDO

14:27 Well, no. So honestly, it was there before I started, it was there before I started, but they needed to price out in a standardized way because they were using excel spreadsheets. They need a CRM to track calls, and get everybody's information in one place. They wanted to be able to do all these other things like project management and honestly like commission, for sales people as well. And now all we use it for is to price work and log calls, which pricing work I can do on an excel spreadsheet. And I hate to do it that way but we can because it's just formulas and then logging calls there's free CRM like Hubspot that we can do that on. But yeah, I'll just forward you the.

SARAH

15:12 And are you guys more of a, do you guys do mostly commercial or residential?

ALFREDO

15:17 Exclusively commercial?

SARAH

15:19 Okay.

SARAH

15:26 Are you guys doing more air conditioning or more refrigeration?

ALFREDO

15:30 Air? Conditioning...

SARAH

15:39 Okay. Yeah, I see what you're saying and, I see what, you know, it is, it's a fact. I mean, so Northboundary was intended to be an add on product, to us. So that is unfortunate that the way they made it sound or whomever you spoke to made it sound like that was going to be part of Northboundary. It's it was more so of Northboundary is going to be a part of service trade. So not quite the other way around.

ALFREDO

16:16 I mean, we're not going to have the money to do service, right? I mean, it's like service tighten. I mean, we're too small. All the other CRMS like it's just we're too small.

--- Pricing ---

ALFREDO

16:27 So like, yeah, we have a three year contract for Northboundary. And like I told you, it's just, we have three years to find out what an alternative is. But if Northboundary is just gonna stay the way it is, then we'll just use it until we don't

need to use it anymore. But ideally, it just kinda feels like the bastard set child of service rate.

SARAH

16:48 I'm sorry, yeah, it was just meant to be, you know, for a tool for people to be able to... like be able to build, you know, build good proposals. Some people spend several days trying to drop a proposal. So to be able to do it in one day or in a few hours was, is a big deal for some of our customers.

--- Pricing ends ---

SARAH

17:13 So that's kind of mostly I guess what a lot of people will buy it for, but I'm not sure. We don't have a lot of Northboundary only customers. We do. I mean, we have a lot but not like... I feel like a lot of people will buy service trade. And then by Northboundary, you know what I mean?

ALFREDO

17:35 Yeah. The other thing is that commercial hvac is very different from what almost all the CRMS are aimed at, which is, I mean it's in the name service, right? Yeah, we do service, but most of our work is special projects that we go in and we replace a very large 100 ton AC unit, right? Exclusively commercial means that we might get a service call from time to time, but typically, we just have preventative maintenance plans and special projects. And so when it comes to special projects, we're talking very large equipment, very expensive equipment, tracking numbers, delivery. When it comes to service, in residential world, you just pick up these things off the shelf a lot of the times, right? And if it's not a good man, it's an American standard. And if it's not an American standard, it's a carrier, whatever it's just like what's the cheapest AC unit, I can find that's available right now.

SARAH

18:28 Right. Yeah, that's why we are different is because we actually only work with commercial and people especially doing preventative maintenance that's like actually what we specialize in and projects we do projects right now up to like around six months projects. I'm not sure how long your projects are on average.

ALFREDO

18:49 I mean, honestly, it used to be three months. If you include lead time, it used to be in and out in three months. Now, it's like six months to a year because of lead time, but the project itself, we get it done in a week.

SARAH

19:00 Yeah.

ALFREDO

19:01 Once the equipment is here. We just do it.

SARAH

19:05 Well, I can always give you just to like kinda let you look at it but, you know, just kinda draw up exactly what it would look like if you were to possibly by us. I know you said you might.

ALFREDO

19:15 But I...

SARAH

19:16 Can give you like a accurate.

ALFREDO

19:19 You said it's per technician that's how we pay, right?

SARAH

19:22 Yeah. And, I know we do like different like sometimes discounts and things like that. So that's why I don't like I can't give you like an actual like invoice or quote over the over, you know.

ALFREDO

19:34 No, I know, but I'm...

SARAH

19:35 Here.

ALFREDO

19:35 I guess.

SARAH

19:36 Like we something on paper to look at?

--- Pricing ---

ALFREDO

19:39 Yeah, we pay per technician, but then, can I have my sales guys? Am I paying for my sales guys to make proposals and am I paying for my admin to access for?

SARAH

19:49 Any administrators? And then depending on how you wanna do... you know, like, your Northboundary and stuff like that, that's I mean, that's all going to be like I said, like I can't really give you like numbers on that just from sitting here right now. But I think you would actually, I mean, just from what you've told me, I feel like you actually would definitely really like service trade. It's it's I mean, it's literally built for

what you're describing to me. I mean, it doesn't hurt to take a look if you want to. And then at least you'll have an educated decision on that.

ALFREDO

20:30 See how much of the.

SARAH

20:32 I mean, you know what I mean? At least at least take a look and then see, and then, at least, you know, when you're looking while you're looking because you said you were planning on looking around, you'll kind of at least have something to go off of as well. Either way, then you're gonna compare, you know, you're gonna compare different features and prices and things like that. It's gonna take you some time to really look at around like that, to look at a lot of different. There's a lot of softwares out there now, but a lot of them are geared towards residential, so, and...

ALFREDO

21:04 We did this.

SARAH

21:05 A maintenance.

ALFREDO

21:06 Yeah, we did this exercise a while back two or three years ago because I was kinda disappointed with north bound, I inherited Northboundary, and I was like, it's kinda sucks. And then, so I looked at Jobber help plus... something desk. I looked at service tighten and I looked at BuildOps. I looked at, I looked at a bunch of things, right? And really at the end of the day is that we're small... and we just need integration. But, you know, the owner, he kinda chuckled because he goes, I'm glad that you didn't find anything because I've been doing this forever trying to find something that's better and affordable and I haven't been able to as well. So I'm glad it's not me, but yeah, it's just.

SARAH

21:49 Part because you guys have 10 technicians and actually, I mean, I have a lot of customers that only have three technicians with service trade like three and five. And I mean, we have lots of like actually really small customers. So I wouldn't say that, you guys are like kind of a mid level. I wouldn't even say you guys are really small.

ALFREDO

22:10 Let me see.

SARAH

22:11 So, as we would have you in a different tier... and a higher tier than like the, we have like a low tier, mid tier and a high tier, you guys would be in the mid. So we wouldn't even put you in a small category.

ALFREDO

22:29 Is that the house call pro that's the one that I looked at? So we would be the premium 139.

SARAH

22:38 Yeah. If you want project management, you're gonna need to do that. Yeah.

SARAH

22:46 But depending on a lot of factors we could possibly get, we could potentially get some kind of discount or something like that. Also, it's like the end of the year. So they start kind of like pushing things and they try to get some like into the quarter end of the year deals in. So you do have an advantage on that.

ALFREDO

23:07 Yeah.

SARAH

23:08 I can't give you exactly what it would be, but.

ALFREDO

23:10 But I mean...

SARAH

23:11 There's a possibility.

ALFREDO

23:14 Is...

SARAH

23:14 A good time to take a look.

ALFREDO

23:17 It would be, we're paying about 2000 a year now for Northboundary and it would jump to 10,000 for service trade for six technicians.

--- Pricing ends ---

SARAH

23:25 Right. But what, the capabilities that we have to offer it is a lot of stuff that we do for you guys. So.

ALFREDO

23:33 I'm not sure if you.

SARAH

23:33 Using a field service management software right now.

ALFREDO

23:37 No, I mean, field service. No, it's just been a lot of emails. Could you, yeah, to book a time to see a demo? Do I go through you or do I go through the website?

SARAH

23:48 I'll go ahead and connect you with someone. I'll find, the territory manager in New York tier and I'll have their sales rep reach out to you. So you don't have to do anything. I'll make sure I'll take care of that.

ALFREDO

24:03 Okay, perfect. And then, do you know, off the top of your head, does it link to Quickbooks?

SARAH

24:09 Yes.

ALFREDO

24:10 Okay. Quickbooks online or Quickbooks? Enterprise?

SARAH

24:13 Paulson?

ALFREDO

24:14 All of them, even enterprise desktop?

SARAH

24:17 Yeah, we love Quickbooks. Yeah, we have Quickbooks. We love Quickbooks online is one of our, I guess our favorite one. But, yeah, all of the...

SARAH

24:38 Yeah, it's hard to tell you the value or like to show you the value of it without you looking at it. But at least if you take a look then you will know for sure whether it be something worth your time or not. And then I don't know, maybe go from there, but.

ALFREDO

24:52 Okay, perfect. I'm just taking notes here. Sorry.

SARAH

25:12 Yeah. Today's like the only day I barely have any meetings. It's so wonderful.

ALFREDO

25:17 That's nice today's. A busy day for me. Where are you based out of?

SARAH

25:21 I'm in North Carolina.

ALFREDO

25:22 Awesome. Well, park.

SARAH

25:24 Durham.

ALFREDO

25:25 Nice. I went to school at Duke, so, I know Durham very well.

SARAH

25:29 Okay.

ALFREDO

25:30 Yeah.

SARAH

25:31 I look really close to Duke like 10 minutes to Duke. So, very close, but more like northern.

ALFREDO

25:38 Very cool. Durham has had a huge resurgence ever since I left.

SARAH

25:42 It is insane. I mean, I remember when I first moved out here, it was, well, I used to live in pay Bill and it was like you didn't even go to Durham back then, like you, if you had to go pick someone up or something like that, but you didn't even like stop the car, you know?

ALFREDO

25:58 Right. No, it was like getting worker back then. No, it was, I graduate in 2008 and it was really bad.

SARAH

26:03 Right.

ALFREDO

26:04 Really, really bad.

SARAH

26:05 Now, though, you go down there, you can't even recognize it. It's beautiful there's like restaurants and bars and people all over the place.

ALFREDO

26:11 Performing arts center, tobacco road. There's a, an Indian restaurant down there that I went to recently. My wife and I, we went for our one year anniversary trip. I wanted to take her to Durham because she had never been and we had amazing Indian food anyway. Sarah, thank you.

--- *Small Talk ends* ---

ALFREDO

26:28 Enjoy the rest of your day. I will take the demo and I was taking notes and I sent it to the owner of the company. I'm the VP. So I do all this stuff, and then I'll let you know, well, actually know I'll jump on one of those demos. And then I'm gonna have him join as well. And then can you just confirm because I've had a big issue with the integration with Quickbooks. Can you just triple check to make sure that, it integrates with Quickbooks enterprise desktop version? He's been very reluctant to go to Quickbooks online because of whatever. I mean, it takes a lot to change and his sister is the controller and she's older and has a hard time with change. So, if it does integrate with Quickbooks enterprise, then that would be a big plus.

SARAH

27:14 Okay. I will double check for you. I'm pretty sure I've never heard of them not being able to.

--- *Wrap-up* ---

ALFREDO

27:19 Okay.

SARAH

27:20 Integrate with any Quickbooks. I mean, I was told, that we do with all of them. So I'll double check for you though.

ALFREDO

27:26 Thank you.

SARAH

27:27 Absolutely. Okay. So yeah. So we can go ahead and in this now, I do wanna just double check real quick before we go. We've got one more minute here. You guys are out of Florida?

ALFREDO

27:40 Yup. Miami.

SARAH

27:41 Jealous. I wish I was there like I'm trying to plan a trip right now and I'm just like I just want to go anywhere tropical and warm. So we've got you as having 10. This is important just for me to find your territory manager. There are 10 technicians in total whether you purchase for all of them or not.

ALFREDO

28:00 Right. It's it's up and down in this business you hire and you hire there's a lot of flow. So let's just go with 10.

SARAH

28:07 Okay. We'll do that. And then... because that's just important to know where exactly I need to give to send you and let's see here. So we're in the hvac industry and commercial. Okay. So that's good. Yeah. So I've got your information and also let me double check your phone number while I have you here. I have three zero, five, eight, eight, eight, three, eight, two six. Is that perfect? Okay. Good. And then I've got your e-mail address, and that works because we, we're able to book this meeting. So, okay, we are good to go, so.

ALFREDO

28:48 We...

SARAH

28:49 Get that set up for you. If you have any extra questions that you want the territory manager to be prepared for, you know, please feel free to do. So, you know, have that ready to go. And we look forward to possibly moving into a different direction. We'll see what happens. I'd love to hear your thoughts on it though, and, you know, any feedback you have on that. So we'll do a follow up afterwards.

ALFREDO

29:11 Okay. Do. Okay. Awesome. Thank you.

SARAH

29:13 I have a good one.

ALFREDO

29:14 You too. Bye Sarah.

The End