



Call with Expert Services, LLC - Dawn Jobe

Matt Hetrick with Expert Services, LLC
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Participants

SERVICETRADE

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Field Manager

EXPERT SERVICES, LLC

Dawn Jobe
Principal

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Transcript

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

MATT

0:00 Hey, Jessica. My name is Matt hetrik. I'm with service trade, I was calling for Dawn please.

DAWN

0:00 You for calling expert services. This is Jessica. How can I help you?

DAWN

0:13 I'm sorry, how do you say your last name?

MATT

0:15 It's HETRICK.

DAWN

0:21 And here are service one. I'm sorry?

MATT

0:23 Service trade. She, she just spoke with my counterpart, trying to set up a meeting for today, and I was just... yeah.

DAWN

0:29 Got you. All right. Give me one moment. Okay? One second. Thank you.

MATT

0:34 Of course. Thank you.

DAWN

0:43 Experts, do it better. And with over four years in business, our experience speaks for itself and expert services, we're specialists in creating intelligence solutions for your facility system solutions that reduce costs and maximize value whether it's assessments or energy services. We'll do everything possible to help you improve your bottom line. Tell us about your needs when we're connected.

DAWN

1:13 It's no secret that plan maintenance is the key to keeping cost low. So, it makes sense to invest in a program one that meets your exact needs and an expert services. We offer exactly that we'll create one that focuses on your operational goals, financial targets, facility and equipment type and operating hours, resulting in efficient solutions that lower your annual cost and keep downtime to a minimum for all the benefits, visit expert services, USA, dot com.

--- *Type of work* ---

DAWN

1:48 For commercial air condition service ranging from small, many splits to large coolers, turn to expert services, whatever your cooling needs are for your commercial building, our expert technicians can service, repair and maintain your system to keep you running. Comfortably, go to expert services us. Give me one moment.

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

MATT

2:08 Of course. Thank you.

DAWN

2:10 You're welcome?

MATT

2:21 Hey, good morning, John. It's Matt with ServiceTrade. How are you?

DAWN

2:22 And you?

MATT

2:28 I'm doing quite well. It's good to chat with you. Again. I just spoke with Charlie. He mentioned that you guys, were you're still in the market for service software and you're trying to set up a demo?

--- *Purchase decision* ---

MATT

2:43 And I know, I'm sure you guys have been looking at a lot of software lately. So I didn't know if you remembered our conversation specifically. So I just wanted to touch base with you real quick just to make sure that we don't end up in your time, we know valuable.

DAWN

2:50 Yeah, that's this one.

MATT

3:00 So, we actually met back in November and looked at you guys, looked at service trade as well as our parts management module and you actually loved us and felt it was a really good fit and we were excited about it too. And I know we got down to pricing and all that looked good.

--- *Purchase decision ends* ---

MATT

3:20 But then Karl had looked through the TS and CS, and learned that it's you know, it's kind of, a trusted partnership situation where, you know, you sign on the line and, you know, it's an annual subscription. And there's not really any rip cord unless we are completely violating the terms of our agreement. We're just not doing what we're supposed to be doing, but I know that was a major concern for him that there was no clause to, you know, pull the plug if you didn't like it six months in or something like that. So, I was wondering, have you, and have you guys had a conversation about that? Has that stance changed at all?

--- *Pricing* ---

DAWN

4:01 So.

DAWN

4:03 Now that kind of resurface. So I appreciate your call on that. Let me ask you this, is it the same for let's say we have tech. I don't know if everybody has a high turnover, but there's times where there's turnover. So, are you saying that if we sign tech a up and he quits or retires a week later six months later that subscription does not stop, you have to pay for the full year?

MATT

4:21 Okay.

MATT

4:36 Yeah. So what most people do is they will sign on with, the number of licenses they expect to use. And then that is locked in for a year however they're not named licenses. Meaning, so if you lose a tech six months in that license kinda becomes freed up so that when you hire a new tech, they can take that spot. So it's not like... you know, that tech leaves and you're stuck paying for the rest of the six months and then have to add another license. When you add somebody. Else. Does that make sense?

DAWN

4:58 Okay.

DAWN

5:09 Okay. That I can completely understand.

DAWN

5:14 Yeah. No, that I think we're fine with. And it's just a year at a time, it's annual, correct?

MATT

5:21 Yeah. Some of our customers prefer to sign up for multi year deals as well. But, if you guys are that nervous about the experience, then one year is, the minimum that we do.

DAWN

5:26 Okay.

DAWN

5:36 And I'd probably say the first year and I don't know if this is something that's even doable.

--- *Purchase decision* ---

DAWN

5:40 But I'd say the first year we'd probably just do an annual make sure it's a good fit on both sides. And then as long as everything's great at the end of the year, if it especially gives us a better of a price break to do multi year, I'd be open to that.

MATT

5:46 Normal.

--- *Purchase decision ends* ---

MATT

5:54 Yep, absolutely. Absolutely.

DAWN

5:56 So, no, and, I appreciate that. I think with, and there could be a lot of confusion because you're right? We are demoing in the current software sold to BuildOps. Now they're similar. But the clause is you can't that license is not transferable. So your Johnny retires, you know, a week later six months later, you can't transfer that license to someone else.

MATT

6:24 Interesting.

DAWN

6:25 That's what maybe has, you know, caught Carl too, and there may have been some understanding misunderstanding on our part because we were demoing so many and that's why the urgency to change because perfect. We're sold to build ups and knowing that going into this, no, we don't wanna do it.

--- Pricing ---

MATT

6:48 Yeah. Okay. I did not know all that, that's very interesting.

DAWN

6:53 Yeah, it's like Adobe. I pay for 10 licenses a year if someone quits or what have you, I still have the license but I can reassign it to someone else. I'm fine with that and he'll be fine with that. Part two. I'll just make sure we're both, you know, piece clear before I start the demo.

MATT

6:54 Okay.

MATT

7:14 Yeah. So I, I've taken notes. I know that was a concern, but I think he said because all of the, for most of our agreements, all of the payment is due upfront and I think we talked with you guys about doing, you know, getting some split payment terms approved so that you're paying for all of the onboarding services upfront and a portion of your subscription. And then the other portion wouldn't be due for, you know, a few months into your subscription, and I think the main sticking point with him was that there was no clause to a board, the mission if they ended up not if you guys ended up not liking something two months into the term. So.

DAWN

7:33 Okay.

DAWN

7:37 So...

DAWN

7:54 Okay.

--- Pricing ends ---

DAWN

7:56 And I'll talk to him about that and I would ask if we could do that only because we did pay for perfect where a couple of months ago, well within two months and that it's brutal. We're having to do this but, you know, anyway.

MATT

8:12 Yeah. I'm sorry to hear that there's really there's a lot of... well for lack of better term subpar products out there on the market. I'm pretty confident you guys are gonna love service trade. The last few times we've talked to you were designed exactly for what you guys are doing and you'd love all the features. It was just, that small T and C hang up that stopped this last time.

--- *Purchase decision* ---

MATT

8:43 So, yeah, if you talk to Karl and break out situation, I can even resend you, the workspace that housed all our demo recordings and all the resources on service trade to help refresh the memory. But if you talked to Carl and that's not a deal breaker anymore and you guys can get past that, then, you know, I'm willing to meet with you and, you know, do more demoing, if you need that and, you know, move as fast as you guys need us to.

DAWN

8:55 Okay.

--- *Accounting integrations* ---

DAWN

9:10 Okay. So question a couple of questions with perfect where we knew, their mobile app was less than desirable. So we engaged with xi per perfect were recommendation. So of course, we start our process with xi, which is just it's for the field integrates. Now, I'm being told by xi that all are set up for integration with the, my question.

--- *Access to information* ---

DAWN

9:48 I understand why perfect wear would need, you know, a third party app to help from a, from the technicians point of view? Because there is no app, but is it really needed with ServiceTitan? Or do you all have a service trade? I'm so sorry.

--- *Accounting integrations* ---

MATT

9:37 Huh.

--- *Access to information* ---

MATT

10:06 Yeah.

DAWN

10:08 They called earlier and I was like, no, tell them that I wanna talk to them.

--- Accounting integrations ---

DAWN

10:12 Is it really needed with service trade? Or is the mobile app robust enough, or are you familiar with the X at all?

MATT

10:22 So, I'm roughly familiar with xi in, from what I've heard from people. This is a great question. By the way, usually it is overkill to have XY and ServiceTrade a lot of times people are using XY, so they can easily capture pictures and videos and stuff like that. You can do all of that through the service trade mobile app. I think xi might offer some slightly more robust features in terms of capturing that media, but I don't know that it's enough to one pay for a separate application and to figure out integrating, the two systems. So, yes, I believe we have an integration but I think having the two would be absolutely overkill.

DAWN

10:33 Okay.

DAWN

10:52 Sure.

DAWN

11:01 Yeah.

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

DAWN

11:06 Okay. And one final question. And if you don't mind definitely resend me that, and that will help refresh memory and we can just kinda work off that today.

DAWN

11:17 When the text upload videos and pictures, will that information as long as we select it, if that's even a choice, can that be emailed out to the customer when you send a copy of the work order or the invoice or is?

--- Customer engagement ---

MATT

11:33 100 percent and that, that's a big part of why we built the platform so that it's easy to capture that documentation. The, the primary purpose that is so you can share it with the customer and tell the story and reinforce the value that you provide.

DAWN

11:35 Okay.

DAWN

11:48 Okay.

--- Purchase decision ---

DAWN

11:51 Okay. Awesome. If you don't mind rise, if you've got that recording, resend it, we can watch that and then do I just reach out to you if we have any more questions or next steps?

MATT

12:05 Yeah, absolutely. So, I'll send that to you guys. And in fact, I was just looking at the recap workspace and for some reason, I think there was internet issues because the initial demo on there, it looks like it was cut in half?

--- Purchase decision ends ---

DAWN

12:21 Okay.

MATT

12:22 But there's three recordings for you to look at and then there's even information on the accounting integration which I believe we had a meeting on as well.

DAWN

12:32 Okay.

MATT

12:34 And I don't see any pricing information in there, but.

MATT

12:39 I'll see if I can get you that quote that we sent previously.

--- Purchase decision ---

MATT

12:44 If I can track that down now, that will be outdated. So, I mean, any discounts on there to get reapproval for, but it should give you an idea of the pricing structure and it'll allow Carl to read through the TS and CS again just to make sure that it's not a deal breaker for you guys anymore.

DAWN

12:46 Okay.

DAWN

12:49 I understand.

DAWN

12:58 Okay.

DAWN

13:01 And I appreciate that I do.

MATT

13:03 Yeah. So, yeah, I'll send this to you. You guys have the conversation and, if it looks worth it, like I said, I'm more than happy to set up, a demo to answer any other questions that the recordings don't answer, you just let me know if you guys need. And, and, you know, like I said, we'll move as fast, as you need us to.

DAWN

13:15 Okay.

--- Purchase decision ends ---

DAWN

13:20 Perfect. Thank you so much. I appreciate your help.

MATT

13:23 You're very welcome. Don, again, good chatting with you and I'll be in touch with those resources.

DAWN

13:28 Thank you again.

MATT

13:30 All right. Bye now.

DAWN

13:31 Bye bye.

The End