Transcript

Krystal Hobbs 0:04

Welcome to Beyond The Tools, the podcast that helps contractors attract more leads, grow their business, and finally get off the tools. In each episode, you'll discover marketing tactics that work. You'll get actionable insights from other successful contractors, and connect with experts to help you grow. I'm your host, Krystal Hobbs, owner of a social media agency that helps contractors attract and convert more leads. Get ready to take your business to the next level so you can finally enjoy the fruits of your hard labor. Ready, let's go!

Krystal Hobbs 0:46

Hey, contractors, welcome back to Beyond The Tools. I'm your host, Krystal Hobbs, and today's interview is all about using technology to make your home service business more effective and profitable. Gabe Pinchev, the founder and CEO of FieldPulse Field Service Software, joins us on this episode. What we really get into in today's conversation is how you can use technology to make your business much more efficient in terms of operations, how you can sell more, and how you can also provide a better customer experience. We also give some really practical tips on the sales process, from creating an estimate to following up on estimates that have been sent out. This is an excellent discussion, and Gabe has a wealth of knowledge to share. So let's go over there and hear from him.

Krystal Hobbs 1:50

Gabe, welcome to the show! Super excited to have you here.

Gabe Pinchev 1:53

Thanks for having me on.

Krystal Hobbs 1:55

So I am curious, I know you come from more of a technology background. But how did you get into software for the trades specifically?

Gabe Pinchev 2:06

So I have more of a technology background dealing with small business mobile applications. I was doing IT consulting and we were dealing with multiple business apps

in different areas. I was exposed to what was available. And the majority of the service industry is comprised of small businesses. However, the smaller end of the market (under 20-50 person companies) lacked a viable solution. And I was also dealing with various service contractors who were not using any technology and making various mistakes, whether it was with their scheduling or handwritten quotes and invoices where the math was incorrect and they couldn't find previous information. So I saw a big need for software that was designed for small service contractors and was also mobile-friendly. At the time, mobile applications in general were still new and evolving and they're always changing. Something that's mobile-first in design for them and caters to the small end of the market that was previously underserved.

Krystal Hobbs 3:16

That makes total sense. And I know exactly what you said, obviously, I'm generalizing here, but a lot of contractors are more pen-to-paper or face-to-face kind of people for the most part. And technology can be certainly intimidating at times, what are some of the challenges that you see in the trades when it comes to using technology in their business?

Gabe Pinchev 3:42

I believe it is simply committing the necessary time. But we are seeing a general shift, particularly in the last couple of years where I believe there is a lot more proactive embracing, and some of it is simply new generations taking over. And the default for them is to turn to technology. But there are many things that technology allows you to do that pen and paper simply cannot. As a result, if you do not embrace it, you will be left behind in some areas. Customers are now dealing with different technology on a daily basis, and they have expectations on how they want to be serviced whether that's simply optimizing your scheduling day to really get more out of your workforce to what customers demand. That includes everything from hailing Uber rides to ordering food. As a result, they are beginning to expect that experience in other places. So there's an element of do you keep up with that and follow that trend or do you stick to an older approach while others continue to move forward?

Krystal Hobbs 4:45

I think that's a good point in terms of like customer perception if you're showing up and kind of writing everything in a notepad and it takes a long time to get a quote back or those types of things, obviously that's going to have a big effect on your sales as well.

Gabe Pinchev 5:03

Well, the service element in general is huge. And one of the things I talk about is that we find a lot of service contractors, who started as tradesmen in the trades. And they're really great at that. And they believe that's what will carry them forward. And it can affect your quality of work. But the other reality is, customers can often not tell the quality of their work as you can, your customer is not an expert in what you do. And so, but a lot of what they do see is the service and reliability aspect. That is really one of the most important factors for a customer, ultimately, they can tell, did you show up on time? Did you reply to their messages, were you proactive about things, they might not be able to tell whether your install was good or not, at least not sometimes till down the road when there are issues, but they can tell if they had a good experience with how you treated them, and the service and the speed and the timeliness. And that can ultimately be what really separates people. And just speed and interaction are key, we've seen that often, the first person to turn around a quote, can often win the job. And so just the element of how quickly you're handling them and handling their needs can ultimately be the deciding factor rather than the quality of your work.

Krystal Hobbs 6:22

I think that's such an important point. And I want to dig into that more. But I think it'd be good to get a little bit of a lay of the land when it comes to technology in the trades. Because I know sometimes at our agency, when we're talking to HVAC companies, I'll ask if you are using any sort of CRM and they're like, "I have QuickBooks." And, there are all sorts of different software and platforms for different things. So can you share a little bit, I guess, in your experience, what are the different tools that companies in the trades might need?

Gabe Pinchev 7:00

So I think there are levels of progression. But we see people from literally nothing without a website and without custom email addresses everywhere up to people on fully sophisticated systems like FieldPulse. And so the different elements I think you start with, you definitely need a website and a way of capturing your inbound leads. And there are more sophisticated systems that can take your leads. So elementary-wise, would be taking your phone calls and emails. But then there are also different ways of capturing everything through submitted forms and their information, even to the level of chatbots on your website, and walkthroughs that are trying to get a little closer to what your problem is before taking in that information. And then ultimately, where does that

information go through the workflow? And so everything from managing the customer information to then scheduling and dispatching software and technology that helps with that element.

A lot of service contractors are still using text messaging, calling in, or having everyone meet in the office in the morning, but changes and updates, and schedules are really hard to manage if you're not using a joint team scheduling tool where everything is shared dynamically and actively. And then beyond that, creating estimates and invoices. I think that's actually one of the areas we see most people digitizing first because there are some free estimate invoice tools out there and included in QuickBooks, but it's really the connections between all the different technologies. But there's so much and then you go to the timesheet and use technology for that because properly tracking your guys' timesheets and their locations where they were is critical. A lot of service companies want to make sure there are guys at the job when they said they were. Are they actually there when they clocked in, not somewhere else to manage your maintenance agreements and assets? And really just everything across the board.

And there's a lot of technology for the marketing side. If you look at even internally at a company like ours, we use several different tools. I think on the service side, you typically are a little bit more simplified in your offering. But you still need to identify and work on the key areas, which we talked about: websites, lead generation, and email marketing to your existing customer base, especially depending on your trade. If it's something where they might be using you more often, you want to stay as that main point of contact and re-engage them. And then when we look at marketing, the other element that I think is a little bit forgotten is really how you impact the sales experience with marketing so that they choose you versus others when you're providing a quote or an estimate.

Krystal Hobbs 9:47

So in your experience with some of the customers that you've worked with, what are they doing to make themselves more likely to be successful when it comes to that quoting and estimating process?

Gabe Pinchev 10:01

I believe that using technology to be consistent and to be able to put something better together is easier. You can handwrite and manually create estimates and invoices, but using templates and predetermining information allows you to do better quotes and estimates faster. Then, the most common issue I see people struggle with, and where I

see a significant difference with technology, is following and tracking quotes and invoices. So, in terms of quotes, which ones have you sent out, which ones have you not heard back on, and how are you following up on them, maintaining a cadence, and guiding your customers through the sales process? It's extremely difficult to do if you don't have anything to track it. If you're using pen and paper, you usually send out your quote, and if you hear back, great; if not, they move on. But the reality is, and we discussed this extensively, that following up makes a huge difference. And this is just a part of human psychology. People sometimes need a gentle nudge, a gentle reminder to get going. And so many times that little nudge says, "Okay, let's do this," when otherwise they just put it off or forget, I know I do that sometimes I engage in something, and I learn a little bit about it. And just in case I forgot, they sent me a little follow-up email saying, "Hey, do you want to do this? Let's go ahead and do it right now." Otherwise, it just kind of vanishes. And I believe people are unaware of this because of the minor follow-up. As well as having that cadence automated. Following up with everyone can mean the difference between winning and losing a deal.

Krystal Hobbs 11:29

When it comes to following up, what do you see as best practice? How should they do it? How often?

Gabe Pinchev 11:38

So people have different approaches to how many times I've seen some people have, like 710 follow-ups, which I believe could be a lot depending on the situation and also depends on the type of work you do, but I do believe you need at least a few. But what I like to preach or talk about when following up is that it's better to follow up with new information, value, or education. Rather than simply saying, "Hey, I wanted to check in", "Hey, I wasn't following up." or "Hey, I want to check in," which is irritating. That bothers me. But if you come in and say "Hey, I wanted to update you on this question you had, I got an answer for you", or "We have this new promotion," that's a value or changes the scope or their mindset is a lot better of a follow up in my view than just saying I'm checking in or following up because those are annoying and just annoy the customer.

Krystal Hobbs 12:39

That's a really great point. I love the idea of having a new angle or something worth reaching out to them with. So let's say you're in a truck company, and you're going to somebody's house to quote them. How does that process typically go? Or what do you see as being most effective? Do most of your customers? Do they end up doing that

process? Like living in the home with a person? Or are they kind of taking it back and sending it off later? What does that look like?

Gabe Pinchev 13:14

I think that's an interesting question. I think that's also part of what we've done and what we're actually focusing on a lot more now is showing them how they should be approaching the sales process and opportunities of what they see and how they do it. So typically, okay, why did someone call you? Their air conditioning is not working for whatever reason typically. So you come out, you'll do a diagnostic. And you'll say, "Okay, this part needs to be replaced." And that's fine, or "Your system or equipment is old, and you probably need to replace the whole thing, or you might need to do the entire system." However, there are a few things that we see in the past. One is that people are unable to provide a quote or estimate on the spot for larger or smaller items because everyone wants to do the job and replace them on the spot. So that's a plus, which isn't always the case in other industries. So, specifically, HVAC technicians are pretty good at diagnosing problems and then attempting to quote and perform work on the spot, which is excellent and best practice.

In some other industries, we see a lot of "Okay, I'll send you a quote, follow up, and get back to you," and I believe that the time difference between not being able to provide a quote on the spot and being able to discuss it with them and go through their concerns can make a huge difference in winning deals and being able to address their issues and possibly even getting a response immediately. The other factor is really guiding them to options. And so let's say you have an issue with their system and you can replace it with a part but you also know their system might be ten or twenty years old and one of the things we're trying to get into is how do we put automated proposals together, we have it ready. But we're trying to actually pre-canned and do everything for you guys, really where they're saying, "Okay, I can repair it by replacing this part for X amount, or we can do a whole new system that is significantly more energy efficient. And you can finance it for however many dollars a month, but you will save this much on your air conditioning bill. And so it's a net zero." And so you're presenting a new opportunity for a much bigger job that is ultimately making you more money, rather than just doing a quick easy replacement. And the way you sell and showcase that is critical, because you're taking factors in like the energy savings, and any subsidies, there might be the value of the system and how it impacts your home. All these elements are parts that you have to market in your sales process, that people don't do well at all. And so that when they traditionally presented those, "Okay, we can repair it." And if they want to offer a

replacement, it's a replacement. But then when you look at the cost, it can be five to ten times the amount and so people aren't willing to go. So positioning in the sales process, specifically in HVAC is critical, and something we think the industry can do a lot better to sell new systems, and upgrades, and be more profitable.

Krystal Hobbs 16:25

So when you look at some of your most successful customers, what are some of the things in that process that are really working for them?

Gabe Pinchev 16:35

I think having their quotes and proposals pre-prepared ahead of time and the different, whatever their different needs are right, so they have it set up. So if they have to do X type of system, they have a proposal set up that's really good and ready to go. And the ones who don't have that and they're having to create it on the fly, you're not going to create one as good, and it's going to take significantly more time. And so they're not including those elements in their proposal that really showcase why they should pick you and why they should go with this choice over another. And it's really about selling better to get to win more deals, but also having a higher margin. And not having that prepared ahead of time is the biggest difference we see in terms of the ones who are better at that and those not as good at that.

Krystal Hobbs 17:24

So when it comes to pricing, I guess what I would imagine they would have to have certain kinds of systems and processes in place to even be able to do that in advance is that fair to say?

Gabe Pinchev 17:38

It's interesting because if you look specifically at HVAC, and we've been kind of talking about mostly there, the cost of the system is a huge factor in their ultimate price. But we've seen some that take the specific pricing for every system, and then apply markup on top of that. We've also seen some that have generic frameworks and pricing where they know this is where it will shake out for a two-ton gas system. And so they don't need to go into the little nuances. But they have maybe 510 prepared for the different scenarios. And they know the ballpark pricing and they have a high enough margin where they're ready to go. Well, we're actually working on merging those two together so that they can have it ready to go. And they can have the exact cost of their system so that they have the benefit of ready-to-go proposals. But they're actually pulling in their

true costs of all the different systems because when you look at the system configurations from one brand, there could be 100 Different options based off if you need gas electric, or you need this type of system, or you need a horizontal or vertical or if you want under tons of variables and depends on the house and what fuel source they have and stuff like that. And so it can get complicated, but really merging the two for us. It's the next level. And this is something we're actually working on right now to really get them that locked-in profit margin they need while still having all the sales capabilities at the same time and being able to put that in in a few clicks. And I think that, from what we see, is really game-changing for them.

Krystal Hobbs 19:19

That makes a ton of sense. So when it comes to implementing a platform like a FieldPulse into your business, how do you get your team to buy in? How do you make sure that everybody that needs to be using the system is doing so appropriately?

Gabe Pinchev 19:37

I think it's a good question because I believe the biggest barrier is that people don't make or find the time to implement it. And we've seen people use it in a variety of ways. Some people were up and running during their trial and are ready to go, but those people have decided to invest in this, their time, and their effort to get it going. We also hear from time to time that they couldn't get their guys to use it, which seems strange to me because they work for you and you tell them what to do. And that is how your process works. So, what is your process, and is a tool and application part of that process? And that is exactly how you must operate. And the other major factor we see with technology adoption is your approach to implementation. Are you attempting to do everything at the same time? Or are you doing it piecemeal over time, depending on your situation and what you want to accomplish? As a result, we provide that option as well. However, some people are successful when they say, "Okay, let's start simple." And we'll only use a portion of the technology for scheduling. So, everyone, in the next month, we're going to nail scheduling. We're going to get everyone on board, and we're not going to worry about quoting, invoicing, asset management, maintenance agreements, or any of that other stuff; we're just going to stick with one and get that down. And then, once we've completed that, we'll move on to the next piece." So, you do it gradually and keep the complexity low. We've also seen some people who want to put everything on right away. If you're just trying to throw them in the app, you'll have to be willing to take your team, sit them down, and really train them to get everything

across the board. And it is dependent on the user, who is performing the action, as well as their level of experience and sophistication with technology. Some businesses fail in this manner.

Krystal Hobbs 21:29

That's interesting, I even found with our clients, we've realized that we need to train them upfront. And then we need a checking call, two to three weeks later, to make sure things are going well. And I even find for some clients a couple of months down the road, because they've kind of fallen back into bad habits and need that refresher again.

Gabe Pinchev 21:53

Definitely, it's really about them buying in and doing it also depends on the type of technologies because technologies are naturally more transactional, also in their model in terms of their support. And so you're, you're forced to do it on your own. And others have a heavy Customer Success implementation model where they are investing the resources, but that cost will be different for it. Typically, you'll spend less on those transactional types where you're self-serving. But if you need that extra help getting implemented, which we actually typically recommend, you'll have to pay for that kind of thing in your own business. If there's more work, you charge more, if there's less, you charge less, obviously, and so it aligns with your appetite.

Krystal Hobbs 22:38

So I know a lot of clients that we work with, sometimes they want one tool that can do it all. In your opinion, is that possible? Is that what people should be looking forward to, like one platform or piece of software that does everything?

Gabe Pinchev 22:56

So, yes and no; I believe it also depends on the size of your company. And I believe so, as does your technological sophistication. So for us internally, it's FieldPulse. We're a technology company, so that's kind of natural. So, for each element, we use a plethora of different software. But if your core business isn't technology, I think getting an all-in-one system or something close to that is a good idea because there will always be some elements that aren't, whether it's your accounting software or your marketing. However, having everything in one place can save time and reduce problems. And it's really the interdependence of everything that's important. And, in my opinion, I recognize that I am biased. The interrelationship is critical for service contractors, with your CRM containing all of the information on your estimates, invoices, files, photos,

and assets, as well as the ability to cross-reference, are essential. And, when you're opening an invoice, being able to easily and seamlessly open anything related to it within the same window is huge. In the field service space, having something all in one and together, in my opinion, dramatically increases your efficiency. Because you're not switching between applications. You don't have to worry about things integrating properly, which can sometimes be a problem, and you get everything in one shot. On the other hand, you may not have as robust a capability. We have some marketing elements, for example. But, if we were to expand our marketing suite, it would never reach the level of say, HubSpot, right? That's their bread and butter. They've been working on that for 20 years, but you may not need it, and it may be overkill. So you must pick and choose where you want to go deeper, and then you may have something standalone or something integrated. And I believe it is based on your appetite, your savviness, and what you need out of that system.

Krystal Hobbs 25:03

So at FieldPulse, what do you feel that your system is strongest at? Like? What's the main thing that is most powerful if somebody's looking for that?

Gabe Pinchev 25:17

So we have a lot of different modules, but the three most important ones are the CRM, which manages your customers and feeds into your job scheduling, dispatching, and team management. Then there are estimates, invoices, and payments. We also do timesheets, which is a fourth major thing. Then there is a slew of other modules. But those three are the most important and interconnected to the program. What are the most important elements in your customer profile or CRM, after all? Is it the work you did for them, your invoices, and payments? So, when you look at a job in your scheduling system, what are the most important elements in this business? Typically, the customer's information, as well as your invoices, quotes, and payments. So those three are so inextricably linked that they form the foundation of our platform. And those are the three that I would not recommend separating into separate systems. You could get something else for marketing, timesheets, or even inventory, but those are the three that I recommend you keep in one system.

Krystal Hobbs 26:27

And I know in the software landscape in this industry, there are all sorts of different tools. And a lot of them, as you said, are at a much higher level of a company. So for

you guys at what size company or what level of revenue does FieldPulse make the most sense?

Gabe Pinchev 26:50

The majority of our clients have between one and fifty employees. So we do get one-man shops, and there is a lot of team management involved. So one-man shops are not doing it. However, there is a lot of value they can derive from it, particularly in terms of keeping themselves organized and historical information, creating really great sales quotes and proposals, and simply tracking everything across the board. However, they do lose some of the team management information that they do not require, which is critical for it. But I wouldn't recommend starting something as a one-man shop because, eventually, if you do want to grow, it becomes much easier. Because you're just saying, "Okay, here's our process. I'm adding another person." And now you're just feeding into that existing process. You never want to expand, never want to add more people; I think it's easier to avoid being on one. But I do recommend that people say, "Hey, if you want to grow, get one now so you can nail it for yourself, and then adding another user down the road is so much easier." But, in terms of sophistication, I believe we've also seen that as they grow to 100+ users or people, they begin to want dedicated accounting systems that are sophisticated and dedicated to other branches. However, for businesses with 10-30 employees, we still recommend that you use a fairly comprehensive all-in-one system.

Krystal Hobbs 28:09

That makes sense. So I know we've covered a lot here in terms of being able to use technology to make your business a lot more effective and to be able to better sell and provide a better experience for the customer. I guess any last words of wisdom for our listeners when it comes to implementing technology into their business?

Gabe Pinchev 28:37

In terms of implementing technology, I believe you must first decide how you want to go about it. Right? What is your level of technical savvy, which is self-evident, but you must decide, okay, can I self-service, then perhaps a self-service tool is appropriate for you. But if you're not you, you should think about it. Because different technology platforms in the industry not only service different verticals and may have a focus, such as one may be more geared toward certain service industries and others. And I believe you should consider not only what best aligns with you, but also what is best suited for the size of your company. And how do they handle customer satisfaction and support? For

example, are they transactional? In this case, they're expecting you to do it yourself, which is common and will result in a lower price. Or do you have a team willing to assist you in getting implemented, which will typically cost a bit more but is absolutely necessary and you should go that route?

Krystal Hobbs 29:42

That's great. So I'm sure our listeners are going to want to learn more about you and check out FieldPulse so what's the best way for them to do that?

Gabe Pinchev 29:50

You can learn more at fieldpulse.com, and feel free to reach out to me. You can also find me on LinkedIn, shoot me a message if you ever want to chat.

Krystal Hobbs 30:00

Awesome and we'll make sure that the links are in the show notes as well. So for anybody listening, you can check it out there at beyondthetoolspodcast.com. Thank you so much, this has been a really awesome conversation about how you can run your business more effectively and I'm sure our listeners are gonna take a ton away from this.

Gabe Pinchev 30:21

Awesome. Well, thanks for having me on.

Krystal Hobbs 30:25

Hey, guys, just wanted to say thank you again for listening to Beyond The Tools. I love hearing from our listeners and knowing what topics, what guests, and what's resonating with you from these episodes. So if you want to share your feedback, please do so. You can DM me @reflectivemarketing on Instagram and Facebook. We're also on Twitter, LinkedIn, Tiktok - wherever you want to, so @reflectivemarketing. And if you are enjoying the show, please go ahead and leave us a review. It really helps us to spread the word to other contractors about our podcast. Thank you so much again.