



ServiceTrade Demo with Comfort International, Inc.

Dan Waggoner with Comfort International, Inc.
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Participants

SERVICETRADE

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SDR

COMFORT INTERNATIONAL, INC.

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OTHER

Yvonne

IPhone

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Transcript

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

DAN

0:00 Hi, Claudia.

IPHONE

0:01 Hi. How are you?

DAN

0:03 Good. How are you today?

IPHONE

0:05 I'm great. I decided to invite Evan, so she Comfort and she will join us to see what you have at service train.

DAN

0:18 And so Yvonne, was it?

IPHONE

0:21 Yes, Evan... pop up in your.

DAN

0:26 Okay. Gotcha. Yeah, I'll keep, the participant area open. So if she pops up, I'll admit her there she is now.

IPHONE

0:35 Perfect. Thank you.

DAN

0:37 Absolutely. And it looks like you're joining from an iPhone. Wanted to just double check. Obviously, I'll be doing, some demonstration here. I wanna make sure you've got a screen big enough to see it.

IPHONE

0:50 Yeah, I'll log into my computer now. Let's see.

DAN

0:54 Okay, cool. Hello.

YVONNE

0:58 Thank you for having me.

DAN

1:01 Absolutely. All right. It looks like Claudia, you're coming down on the computer here?

DAN

1:15 All right. Hopefully we won't have any echo. Are you hear audio pretty good still?

IPHONE

1:21 Yeah, I'm fine. I can hear.

DAN

1:24 All right. Perfect. Well, thanks both for your time today. Looking forward to discussing service trade with you. My name's Dan, I am the territory manager for service trade in the southwest region. So, I work with companies in California, Nevada, and Arizona, all commercial contractors, and I've been doing this for about three years. So I'd like to think I've got a good finger on the pulse of, you know, what's going on in the market and some of the challenges, that contractors and companies like Comfort international might be facing. But I'm always curious to hear what specifically has you all, you know, taking the time out of your busy day, to sit down today. Obviously, I've got a few notes from Henry but my plan was, to start by handing it off to you all in hearing more about what you have going on currently, what's working right now, what needs improvement?

--- Purchase decision ---

DAN

2:16 And maybe, the things that aren't necessarily working well at all, and we can discuss those and so I can show you those aspects of the product and if you see value here towards the end of it, then we can talk about next steps pricing and that kind of thing. But does that sound like a good plan overall?

--- Purchase decision ends ---

IPHONE

2:34 Yeah, that sounds great.

DAN

2:37 Okay. Well, let's see. Do you at all, okay?

IPHONE

2:42 Of course, our biggest point, what we're looking for is our team is broken into two groups. We have a controls like energy efficient controls team and a mechanical team. We use currently use a software for our mechanical team.

--- *Type of work* ---

IPHONE

2:57 But we're looking for a bigger platform to have that both teams can use. The problem we're having with the controls team is finding a software that can accommodate how long their projects run. So their projects could run weeks, months or years. We just started a project this week that's we'll be running for three years.

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

IPHONE

3:22 So we need to be able to have a software where they could be clocking in and out of that job for a three years time frame and I'll start there because everything else you know, will fall into place once we kinda see what you have to offer, but that is one of the key points. It's just finding something that can hold that amount of data.

--- *Type of work* ---

DAN

3:47 Yeah. So, and you're looking so, for the controls team typically for our project management side of things. So we can manage project, operation, service, operation, maintenance agreements, that stuff's all in our wheelhouse when it gets to be those longer projects of over a year, there are a lot of aspects of that we're really just not designed for, you know, I don't wanna, I mean, there's workarounds. I mean it could be done but it's definitely not what our system was built for, right? So there are other partners and such that we have that for some of those long term projects that you might look at and I don't know if that, is that a high percentage of the amount of work we do?

--- *Accounting integrations* ---

IPHONE

4:38 It is, it's a big part of who we are and it's something that we've... we want to do a better job of time tracking and... project tracking those projects. So we just need a software that we can like I said, hold all that data for us instead of us trying to track it on excel sheets. And that sort of thing we're just trying to upgrade it.

--- *Type of work* ---

DAN

5:07 Gotcha. Well, we can definitely improve from the excel sheets. So maybe we touch on this a little bit. I kinda show you what the project management looks like. And, and if it's we can kinda go from there, I probably will look like an improvement at the start. And then we can take questions and make sure it would, you know, be

ideal, for all of those projects. But you mentioned you're using a software for mechanical team right now, what are they operating on?

--- Accounting integrations ---

IPHONE

5:36 In sync team. So that sync team?

DAN

5:44 Syncro team. I don't think I've ever heard of that interesting. Okay. And how about per accounting? Do you have, I'm guessing you probably have an accounting system?

IPHONE

5:57 Quickbooks?

DAN

5:58 Okay. Perfect definitely heard of that. I didn't know if syncroteam was also handling accounting. Yes, typically don't come across too many. I haven't heard of, but I guess there are just so many of them out there these days, but what, is it working well, synchro team for, the mechanical side of things or?

IPHONE

6:17 For the most part, yes.

DAN

6:19 Okay. I saw in the notes from Henry that he mentioned in a couple of other items that you were looking at was more better reporting as well as scheduled dispatch... any specific pain points or reporting capabilities that you're looking for.

--- Tech time tracking ---

YVONNE

6:37 Do you wanna take over that part? Sure. So one of, the pain points where we're coming across when it does come to that, it has more well, I'm gonna talk about it from my perspective, but, you know, there might be something that Claudia will jump in to is from we want it all in one that also allows us to kind of use the same data from dispatching to time sheets to payroll, meaning, you know, capturing those hours and being able to quickly submit those to payroll for, you know, to process on payroll. The thing is like, that requires a lot of effort currently on our part because the software we're using, you know, the tech when they create the time sheets because it does the GPS tracking. And also like, you know, it tracks when a tech goes and clicks, you know, okay, whatever on their app, it starts tracking time and sometimes that's not really valid or what, the tech needs to do. It doesn't allow text to go in and modify their time or even look at their time to see what they've been submitting. So there's a lot of back end having, to have somebody just redo time sheets. So it was really not suited for something like that. So that was a huge part. So

we're looking for something that allows a little more flexibility, allowing, the text to kind of, you know, control a little better, or be able to modify their time sheets, you know, with approval obviously from back office, to submit correctly. So that's one pinpoint the other one. Is that it, the platform we were using before wasn't calculating payroll correctly. So, so I'm not sure if service trade does have the back end of having the, you know, the rates of hourly employees. But, you know, this company or our company allows for over time on weekends. Even if you don't reach the 40 hours during the day or during the week, if you work on a weekend, you automatically get a same thing with holidays. You work on a holiday. Even if you don't have those 40 hours, you get the, you know, you get that rate. So, so having to recalculate, and look at these things before submission was also a potential pain point from that submission. So, so having a platform that allows you to do a little a lot more kind of modification, or flexibility in that would be very beneficial. And was there something else you wanted to touch on that at that point?

--- Paper process ---

IPHONE

9:27 No, I think you got it. Thanks EPA.

DAN

9:31 Yeah. And it sounds like a lot of effort, for the back end as far as tracking down that information and probably a good bit of effort and kind of disruption on the text side too because I would guess you a lot of times you're having to get them on the phone, or track them down and text them.

--- Tech time tracking ---

DAN

9:46 And, you know what well, Randy, where is Randy? We gotta talk to Randy. He didn't put his time correct on this and, that type of thing.

IPHONE

9:55 Yeah, that's exactly it. And then not them not being able to see the hours that they're clocking in and out of, was... a big thing on the, for them not being able to see that.

DAN

10:09 Yeah. So the time card portion of service trade, what it'll do, it does have the clock end feature, right? Where you can track job prep in route time, so that's drive time and then on site. And that's really most helpful when it comes to kind of keeping everybody honest if you will.

--- Tech On-site ---

DAN

10:26 Hey, when they clocked in on site, it'll provide a GPS time stamp that it shows they were actually there. So if they're across the street of mcdonalds, you know,

having lunch, you, you'll be able to see well, you weren't really on site there. So it just kinda keep everybody honest.

--- Tech On-site ends ---

DAN

10:38 But it also gives you that real time visibility into people throughout the day. So you're tracking, hey, Dan is where he should be on time at this appointment or it looks like he's running late to this one. So on and so forth. Now, when they complete jobs, they're able to look at whether it's at the end of the day, end of the week, whenever they would like to.

--- Tech time tracking ---

DAN

10:57 They can look at their jobs along with the clock activity. And then what we have is called labor items. So when you, the scenario you talked about as far as rates for hourly employees, and there will be some other configurations here as well, you might have one guy that's getting paid 40 an hour, another, it's getting 60 an hour, even more senior tech or even, you know, beyond that, right? So, so we can calculate all that in automatically so that when a tech enters it in since that item was sourced from them, so you just have one item, right? It's weekend labor or overtime labor. So when they add that item to the job, it will automatically do it on their rate. So you're getting the correct margins and all of that. And so they're able to review all of that on one page when they're done for the week or done for the day done with the job and they can submit it to you all. And so you'll get the finalized report.

--- Tech time tracking ends ---

DAN

11:49 If there are any errors on there or anything that doesn't make sense, needs adjustments. You can either make the adjustments and send it back to them for them to say, yes, you're right? I messed it up or say, hey, you need to make these changes and submit it back to them.

--- Accounting integrations ---

DAN

12:01 So you don't have to approve it. If everything looks good, you can approve it. And then that brings us to Quickbooks. Are you guys on the online or desktop version?

YVONNE

12:11 The desktop version?

DAN

12:13 That's actually a really good thing because we have templates built out for the desktop version that enable you to import those directly to and are you doing payroll out of Quickbooks?

--- Tech time tracking ---

YVONNE

12:25 Well, that we potentially like, the ability to do so. We aren't but we...

DAN

12:32 Yeah. So you would actually be able to import those approved time cards from the technicians once they've submitted those and approve them, import them to a template or use a template to import them to Quickbooks desktop for your payroll purposes.

--- Tech time tracking ends ---

DAN

12:51 And I'll point this out as we go along the job here today, we'll walkthrough a job from start to finish, but I feel pretty good about your requirements there, and where we could help. So to shift hours a little bit as.

YVONNE

13:06 Far.

DAN

13:06 As like, the type of work and the type of customers that you are, you all handle, I think you mentioned you do have service contracts in place.

--- Type of work ---

DAN

13:14 So service trade is built for commercial industrial service providers specifically. And from your website, what I could tell it looks like that's what you all are into, but just wanted to double check or are you guys doing residential work as well?

IPHONE

13:27 No residential work at all.

DAN

13:30 Perfect. And I'm always curious how did you all come across service trade?

--- Type of work ends ---

IPHONE

13:36 I have an area manager who recommend that I look into your business.

DAN

13:45 Interesting.

IPHONE

13:46 Cool.

DAN

13:48 I...

IPHONE

13:50 Think he was doing his own research and came across your name. I think about three years ago when we were first looking for software. I think he had maybe a meeting back then another rep in your, with your business.

DAN

14:11 Interesting. Great. Well, happy. Happy you recommended us. Yeah, we've got about 80 customers. I think right now in California. Well, let's see here the last question I had as far as like operation. It sounds like... I guess, do you guys deal with things like quoting, for pull through revenue?

--- Accounting integrations ---

DAN

14:33 And are those things important to your day to day or is it more... kind of the accounts receivable payroll type processes?

YVONNE

14:43 I guess it depends on who's Viewpoint you're looking through, right? So most of that stuff, is, you know, all the back end stuff, I guess without knowing like a whole lot about the product, it kind of, I mean, like I said, it varies in terms of who you're talking to.

--- Accounting integrations ends ---

YVONNE

15:04 So as many of the, as many of the, you know, features that your product provides that touch upon what we're looking for, we're looking for a product that will do as, you know, as many, as possible. And in other words, it as...

DAN

15:18 Gotcha. Yeah. And I guess let me rephrase my question.

--- Deficiencies ---

DAN

15:21 It wasn't a very good question. So one of the things that our product really shines with and does very well is identify opportunities for like repair opportunities. Tech goes out to a job site. They can't get the repair done that day or maybe they spot other items that should be recommended to the customer to get fixed before they break down.

--- Customer engagement ---

DAN

15:42 So we have a very simple process for them to document the information they need that information to get back to the office and you all to get a quote out to the customer with a one click approval process including pictures, video, that type of thing. And so increasing your pull-through revenue from things like maintenance work quarterly, you know, monthly filter changes. That type of thing is something our product has really helped our customers do. So that's really how, the return on the revenue starts. That's probably the main factor of it. So I was curious if that resonates with you all business model currently or if that would be intriguing to you?

--- Access to information ---

IPHONE

16:18 Absolutely, it would definitely be something that area managers can utilize if it's available.

DAN

16:26 Okay. Excellent. All right. Well.

IPHONE

16:33 How many, how many admins are allowed?

DAN

16:38 As many as you want. Okay. Yeah, it's actually. So the administrators and office users, they're unlimited and free. So you can just add as many folks as you'd like they can access it from anywhere that they have internet, the mobile application. So typically it's just the text that need the mobile app because they're going to be completing the work orders and such. And so we charge per mobile license.

DAN

17:06 Okay. And was there any additional reporting capabilities you were looking for? I know that you mentioned a good bit as far as like tracking the long term projects.

--- Tech time tracking ---

DAN

17:17 And in time, a lot of it seems to be related to time and logging hours and such. But were there any additional metrics, or, you know, performance indications, that you were looking to report on?

IPHONE

17:30 Not at this time. It's it's mainly the time tracking.

YVONNE

17:35 Which kinda leads into more of the profitability the job and cost profit?

--- Purchase decision ---

DAN

17:44 Okay. Well... great. So if this looks like a good fit for you all today, how would you anticipate, the evaluation process for you all? Is this something that you kind of have a time set on? Hey, we wanna move forward something by September or you've got deadlines to meet or what would the next steps be, if you liked what you saw today?

IPHONE

18:10 If you had a version that we could have a trial run with, that would be great if you don't we understand... we may ask for another meeting that includes the owner of the company just to make sure that we have covered everything on our end. Yvonne and I have meetings. I think we're meeting tomorrow to go over... our notes. And I don't know Yvonne if you have. I think we plan on setting up a meeting with the owner just to kinda go over what we've found so far. We're thinking maybe in the next couple of months. So what is that? Okay? Perfect. That's temper?

--- Purchase decision ends ---

DAN

19:02 Good. Well, we don't really have a trial, that we offer what we could do. I have a field rep in California and they'd be able to come by. We're a follow up meeting might even be nice to, you know, put a face to the name, if you will.

--- Access to information ---

DAN

19:17 But what they could do is, you know, with our demo account that we've got let, you know, hold the mobile app, right? Do walkthrough some of the mobile app, but also mess around it, and go through it on your own right now. So you're just seeing it here on screen, you know, you see what you can hear, but sometimes it's nice to actually sit in front of it if that makes.

--- Access to information ends ---

IPHONE

19:37 Yeah, for me, that's a huge plus because just being able to kind of navigate and, you know, see how it operates in person would be incredibly helpful.

DAN

19:49 Yes. So Katie is down and you guys are in California, correct?

IPHONE

19:54 Yes, San Jose.

DAN

19:56 Okay. Gotcha. She's down near San Diego, but, she works all the way up and down the coast all the time. So, yeah, over the next couple of weeks, couple of months, we could definitely set up a time for her to come on site chat with the owner as well as, you know, give you all some hands on with the product.

IPHONE

20:13 Okay. I'll make a note of that.

DAN

20:16 All right. Well, Katie, yep. And I'll probably introduce her to you once we're done with our conversation today... as well. I'll make sure to keep some notes for you as well. Well. I'm gonna share my screen here... and you should see company overview or Comfort international on the screen.

DAN

20:49 Just wanna double check that I've got the right one. Are you all seeing that?

--- Purchase decision ---

IPHONE

20:52 Yeah. So.

DAN

20:55 Okay, perfect. Well, before we dive into the product, was there anything we missed?

IPHONE

21:05 I don't believe so.

DAN

21:07 All right. Excellent. Well, I am a big coffee drinker so I can get to talking really fast if I'm moving too fast, feel free to interrupt me. I definitely like to keep this more

like a conversation and hear your feedback and answer your questions.

--- Implementation and ongoing support ---

DAN

21:21 So without further ado, though I'll roll into this, I start with a few slides, just give a little bit of background on service trade and then we'll go through the product and walkthrough a job from start to finish and look at, the data structure, data model of this trade.

--- Implementation and ongoing support ends ---

DAN

21:38 So one of, the main things and actually I didn't ask this to you all. But one of the main things that a lot of pretty much everyone I talk to currently in the service industry or facing or the labor shortage, right? Not enough hands to actually get the job done, the skilled technician, labor shortage across the country. Is that something you all are feeling the impact of?

IPHONE

22:03 Bit of it? Yes. Right now, we're okay. But yeah, over the last few years, it's been tough.

DAN

22:10 Okay. Yeah. And the challenge really is that according to our research, it's actually getting worse. So not a lot of folks going to trade school. There's a lot of folks that are retiring, right? So it's actually getting eight percent worse each year which is leading to, you know, further gap between the demand for your services, and the skilled labor supply. So more work than you can handle is typically where folks end up. So the demand is high, right? But becoming efficient and being able to grow despite not having the ability to find skilled technicians is a big challenge.

--- Customer engagement ---

DAN

22:47 So the way that service rate combat that we feel like there's really two sides of the coin, right? And controlling costs in, the first side of it and then growing quality revenue. So while you've got a high demand for service, it's important that you know who your best customers are and you know where your margins are and what the most profitable work is.

--- ST app contracts and pricing ---

DAN

23:08 So that you're spending, your limited resources and your limited amount of time working for the best customers. And so a few of the ways that would then we help with that, right? So some of the things that you mentioned with project

management, improving your service, project operations. So looking at your total incurred cost to having full visibility on materials, use, labor, used hours used on a project, so that you're staying on budget and on time, being able to report on different aspects of your business, repair opportunities to drive time, right?

--- Paper process ---

DAN

23:42 Work orders, the type of work that you're doing and what's most profitable... and setting up your technicians for success. So with a limited number of texts and a limited number of labor hours, wanna make their job as simple as possible. Take a lot of the administrative duties out of their hands and just, make it easy, right?

--- Assets ---

DAN

24:00 So that they can get to the job that they're there to do. So the mobile application set up to give them all the information that they need. So they arrive on site, they don't need to call around to find different information or contacts. They have everything about the equipment and the location right here on one page, pictures and videos from previous jobs that can also be captured from this job and shared with the customer... service agreements for us is a big thing.

--- Customer engagement ---

DAN

24:31 So planned work obviously is easier to plan for, you know, what's coming right? So you're able to utilize your resources more effectively when you know what's up next, as opposed to the reactive work that will can be disruptive at times.

--- Customer engagement ends ---

DAN

24:49 So service trade does have a proposal management tool which you can take a look at all. Of your opportunity proposed sold lost dead and push more service contract agreements to your customers, present a brand that makes sense for them to agree to service contract and win more service contracts... and then growing your profitable customer loyalty.

--- Customer engagement ---

DAN

25:14 So, it's all about working, making it easy to work with the customer. A lot of what our platform is built for and designed around is kind of that Amazon experience, right? It's so simple to buy something from Amazon. You can think there's a button that's by now, just one press and it's sending me what I need. They've got just about everything under the sun. They send you the emails letting you know when it's on the way, you know, confirming when it's there simple to

return. So really easy to work with them. And obviously they've grown astronomically. So the same sort of idea here. We wanna make it simple for your customers, to communicate with you and you to communicate with them and show them value. This is an example of our service portal. Customer could log in, take a look at all the different locations and jobs that you have done for them. They can request service here. Hey, invoices approved quotes and various other ways to communicate. And I'll be sending one of these out to you today. But a, an online service report that will always be available for the customer. So, for a project, for example, they could check, the Progress of that project, the appointments that have been completed, the services, the parts that have been used, any deficiencies or recommendations, you have pictures, the timeline but keeping everyone on the same page. So we.

--- Customer engagement ends ---

IPHONE

26:28 Request a service. Is it scheduling them or are they waiting for approval?

DAN

26:35 So, it will not schedule like it. It does not give them the capability to say, hey, we wanted out here at six am and have that automated. What it will do is create a ticket... and it'll let you know that they can choose a due date. So if it's an emergency, they could choose today, right? And that would pop up on your dashboard. It would also go to the email of multiple people in your business depending on, you know, who would be the one that needed to see those. And then they can find out who's available. Go to the dispatch board, dab, drag and drop, the ticket to the technician, who, who's available. And at that point, you could send a notice to the customer letting them know we've scheduled it when the tech is able to clock in as on the way, they'll get another notification saying the tech is on the way.

--- Customer engagement ---

DAN

27:27 So without calling them, you're able to confirm and communicate with them that their request has been heard. So, so we've been doing this for quite a while and these four aspects of combining those and improving in all those areas have led to a year over year, 37 percent growth for our customers... 13,000,000 assets managed across the nation right now using service trade, which ends up being about 10 percent of the... commercial industrial buildings in the us are being serviced by contractors using service trade.

--- Customer engagement ends ---

DAN

28:03 They've got over 1,200 accounts currently and seven point 5,000,000,000 was revenue was invoiced through our platform last year.

--- Access to information ---

DAN

28:15 So it isn't our first rodeo. We'd like to think we know quite a bit about, the commercial contracting space. Any questions so far?

IPHONE

28:27 Not for me. No good, okay.

DAN

28:31 All right. So I'm gonna start us off on what I call the office view of service trade. So it's, the web application if you will.

--- Access to information ends ---

DAN

28:38 So this would be what your administrators and your office users would do or would land when they log in. So the dashboard is just going to give you a general idea of what's happening right now at the business. So, your daily schedule, the status of those jobs as technicians are clocking in and out.

--- Recurring maintenance ---

DAN

28:57 You'll also see, their clock events over here as well as time stamp or GPS stamps. Once you've set up jobs with due dates or recurring services that have, you know, quarterly annual, that type of thing. They will show up in this bucket if they're overdue and you'll get a two weeks heads up here on the dashboard as well.

--- Recurring maintenance ends ---

DAN

29:18 If you have appointments that are coming up overdue or coming up due and have not been scheduled in the next two buckets.

IPHONE

29:25 Sable the GPS tracking?

DAN

29:29 The text could turn off their location services. You can do that. Yep... you know, when you have an app that asks if you wanna allow it to use location, they could just turn that off.

--- Tech time tracking ---

DAN

29:43 Yep. Just out of curiosity, is that, are you guys maybe union? And, and you feel like that would be an issue?

IPHONE

29:52 We're non union. It's just a question the area managers wanted me to ask. Okay. I think they just don't want the text to feel like they're being tracked. Sure. Yeah.

--- Tech time tracking ends ---

DAN

30:12 Yeah. I mean, you could turn it off. I will say, you know, it's not real time, so it's not like Uber where you can see the tech, you know, moving around every step that.

IPHONE

30:24 It's just something we currently don't use. And so, I think it'd be a sensitive topic if we just gave them a new system. And then all of a sudden they're being tracked. I think they're just trying to be sensitive to it.

DAN

30:35 Gotcha. I did have someone one time that it was so hot. He was out alone on a rooftop and ended up passing out and they were able to find him from his last GPS block in, of the service trade app. So it can be a, could be a safety thing too, but you can turn that on if you want to.

IPHONE

31:00 Okay, great. Thank.

DAN

31:02 Solutely but jobs as they're marked complete by the tech, they're gonna fall to the following buckets here. So the office we'll get to take a look at them before an invoice goes out to the customer. And then these jobs have been reviewed by the office. And all that's left to do is invoice them so that's sort of your daily operations and kind of how the dashboard sets you up. All of this information can be found in more detail and reported on more granularly throughout these sections here. And we'll take a look at a little bit of that next or how, the data model is set up here... that's more of, your helicopter view if you will of what's happening.

--- Recurring maintenance ---

DAN

31:43 So I wanted to show you an example of a contract or a customer. So for this example, you've got top of corporate and they have seven or let's say they have seven locations across. You manage all of those locations and services for them are under agreement.

--- ST app contracts and pricing ---

DAN

31:58 So you're able to report on in real time, you know, and get updates on your expected margin, the invoice revenue to date, the actual margin you're gaining with them that how long this contract is valid until set specific terms and conditions and rules and different pricing models specifically for this customer. So a lot of good information can be gathered this way every time that you have a job for top of it, knows that they're getting this rate, it knows that this is the billing contact. It knows that so on and so forth. So kind of automating specific rules for customers, you can set up these types of contracts as well just as like a general contract. So a pricing for premium customers or pricing for calling customers, that type of thing?

IPHONE

32:45 Would you mind opening up those tabs till I get the contract rules and sure.

DAN

32:59 So this might be where you add an item. It's like, okay. So every invoice that's generated, this item automatically gets added on because they're on this plan... or if you want to add a administrative charge, that type of thing, the payment terms, net seven I think I have here or a minimum charge to go out and visit them for any service call, any reason, that type of thing. Then we've got cost markup. So I've got some pretty simple rules here. Basically, I'd say anything that has a cost of 50 dollars will be marked up 100 percent. You see sort of the scale that I've built, but you can have specific types of mark up as well. So item specific markup and different.

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

IPHONE

33:41 Rules.

DAN

33:42 So you can get really detailed with that or leave it more broad as it is here. Then you'll also have the invoice notes. So you may have a generic terms and conditions or invoice notes that you want to show up on all of your invoices. And then for some customers that are under contract, they may have some more specific notes or information that needs to be shared. So, you can set that up custom.

DAN

34:11 Then down here, any comments... internal comments or these could be customer facing as well. Whether it's for scheduling or invoicing, can attach the signed agreement here of the service contract or anything else videos, pictures that might be helpful about, the customer agreement overall. Was that, what did that show you what you were looking for? There? Any questions?

--- ST app contracts and pricing ---

IPHONE

34:41 If you don't mind scrolling down a bit more sure. Let's see detail level for customer.

DAN

34:52 Yeah. So that's just showing them the, that's the rules for. So you've got a lot of different ways that a customer. So for quotes, maybe you want to show them every line item and the price of every line item.

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

DAN

35:04 But in some cases, you just want to show them line items of the grand total only or you can just show grand total only. So it's how you're presenting the quotes and invoices. So that can be set up specifically. And that probably will make a little bit more sense when we get to the invoice and the quote, but it's just a different way of looking at it.

--- ST app contracts and pricing ---

DAN

35:24 It's kinda like looking at a receipt or are you guys invoicing right now that you show every line item and every price for the line items?

IPHONE

35:33 Depends on the work?

DAN

35:36 Exactly. So, maybe you'd set up different contracts and depending on the work, you know, which contract would automatically be applied and then it could be set to where automatically it's going to present it the correct way to the customer.

DAN

35:52 So, kind of the trick, with contracts, they can be used as customer specific or again, they can just be used as a set, of pricing rules, right? So it can be more broad. This contract could be applied to your entire company. If you wanted it to, you can have parent contracts, child contracts with small adjustments, right? So maybe you have that one baseline contract pricing and then work off of that for any adjustments that were ever made. So you can see here there's the parent contract, MH commercial contract.

IPHONE

36:25 And then is there some way to put the assets for this customer?

DAN

36:31 There is, and so that's the next?

IPHONE

36:32 It list. Okay?

DAN

36:34 So, the contract page is really just, it's all about, the pricing and that type of thing, and the agreement with the customer, and then tracking the invoice and the margins, that kind of thing. So, your corporate office, again, we've got five different locations for the customer and each location page, this is pretty bare bones as well, right? Just, the corporate billing information, the Bill to, if you will, each location page is actually where all of that asset information is gonna live. And everything about this location will be right here on this page. So your services, whether those are recurring services or jobs that need to be completed, repairs, one time services, any job that's ever been completed for this customer, your assets, so that's the customer equipment?

--- Assets ---

IPHONE

37:19 Can I see that really quick? That equipment? Okay?

DAN

37:24 And you can click into these to see a more detailed view. We're going to be looking at that in the field as well, but it'll break it down to service history per asset. So you've got 400 jobs that you've done at this location, especially if you're working on larger buildings and such, right? It could be hard to find what you're looking for. So really easy to identify when was the last time we worked on this unit and what happened to it last? And that type of thing... deficiencies will be repair opportunities. All the quotes you've ever sent to a customer here's, the contract again, that's assigned to the customer... comments. So this could be anything from billing notes and with the lock here, that means it's only visible to users at your company, you could also set up comments to go out with all service reports and such for the customer to see as well. So these can be technician notes, scheduling notes, billing notes.

--- Assets ends ---

DAN

38:23 So that when there's a job created for this customer automatically, these notes will show up for the correct person at the correct time. So technician might not need to know about the billing instructions. So they won't be, you know, left to roll through those, or getting the way... various attachments as well.

--- Assets ---

DAN

38:44 Maybe it's a map of the location, contacts any other documentation, PDF, manuals, that type of thing. And so those attachments will be available to the tech any time that a job is created. If you said it that way. So for your recurring services right now... how do you track and manage, when it's time for, you know, a quarterly service and what's the process where you're generating those tickets, and knowing what to do.

--- *Recurring maintenance* ---

IPHONE

39:17 The software I have allows me to just plug in the information I need. So if they're quarterly, they'll you know, populate every three months who it goes to, which location and they'll just come up the month that they, when the services do.

DAN

39:38 Okay, great. So it sounds like it'd be similar, for service trade here. You'd have the service opportunities, right? Are those being automatically generated then? Or do you?

IPHONE

39:48 Yes, automatically generating.

DAN

39:50 Okay. Interesting. So... service opportunities page. This is when you look at, hey, let's look at next month, for example, let's look at Dan's office and all of our recurring services. You can look at all services and even break it down by the type of equipment that you have if you'd want to as well as the tech location, that type of thing. We'll leave it a little bit more broad. But it looks like we have these services coming up next month. And when I select all there, I can generate all these tickets. And on the right side, you'll see when I scroll down. Okay. So mcdonald's in yosemite, we have five different pieces of equipment that are all due in August, met life. Just the one. So you can see an overview of the services that are due.

--- *Dispatch* ---

DAN

40:38 And like you mentioned, if you want to automatically assign and release appointments to technicians, you're more than welcome to do so. So if you've had a preferred, there's a field when you're setting up services, preferred tech. So if Dan always goes out to, you know, the mcdonalds in yosemite and it's always six PM on a Thursday every quarter, then you can have that automatically go all the way to scheduling and releasing that appointment to them just by clicking great job.

IPHONE

41:08 So the way I do it now is I don't schedule it. It doesn't populate where it generates to schedule. I mean, it does go to their schedule. I just have them come up the day before the first.

DAN

41:24 So you just kinda generate the list of everything that's due within a month and then.

IPHONE

41:29 The technicians, yeah, the day before the first, they'll receive all of their tags for the month of July. Okay. Perfect. Yeah. Then they, then they could kinda work their schedule, right? They could arrange, they know what they have and they know their own schedule to kinda fit those in where they can.

DAN

41:50 Gotcha. Does it. So it sounds like you could use a preferred technicians to where they get tagged on the jobs, but it doesn't schedule them a time. Yeah. So you could do it that way. So once you created those jobs, the ticket that you'd end up with. This is an example.

--- Assets ---

DAN

42:09 We've got our four quarterly services here. The four systems will be working on all of the pertinent information about the customer up top here... pricing and what's to be expected, the equipment that the technician will need, as well as parts, that type of thing... comments and attachments and everything as the tech completes this job, everything will flow back to this work order and we'll look at it in more detail once we collect that information here. But how does that look so far as a quick overview?

--- Dispatch ---

IPHONE

42:45 It looks pretty good.

DAN

42:47 Okay. And so, yeah, for this, you could have what you see here on this one service, how Dan is assigned to it. So that means that every time this service is due, it'll say the preferred tech is Dan, so that's what you could do. Maybe you want to keep people in sort of similar zip code, maybe that I don't know how you're currently doing it, but you could have those assigned technicians. So when the work order is generated, you wouldn't have to schedule it, you just automatically have them knowing.

IPHONE

43:15 So it'll the preferred person? Okay?

DAN

43:19 That's right? You can also schedule it if it's not preferred, or if the preferred person isn't available, you can overrule that and schedule someone here. So I could add Adam, and then I'm just going to cancel. Let's see here.

DAN

43:41 Well, this might be a user error, but basically, you don't have to have a time and date. You can schedule a person to do the job without having scheduled the.

--- Tech On-site ---

IPHONE

43:51 Time and date. Okay. And so this is, I think a good time to ask. So say I have those two technicians yourself and someone else... on the job. Can they both clock in and out of the job?

DAN

44:07 Absolutely.

IPHONE

44:07 Separately, you could separately.

DAN

44:10 Absolutely.

IPHONE

44:11 Okay.

DAN

44:13 They both be able to mark the task complete that they've completed. And so, you know, if one leaves early, he can leave separately as well. So, absolutely.

--- Dispatch ---

IPHONE

44:23 Perfect. Okay.

DAN

44:25 You can add as many texts to a job as you'd like you can also have multiple appointments on a job. So sometimes you might have services and obviously with projects, right? You're going to have phase one, phase two, phase three and different things, that are supposed to be completed each day in each appointment. So this appointment, we're hoping to knock out all of these services, but we can also add a new appointment, and add the service to that next day after that.

IPHONE

44:52 So if you're adding a new appointment or service, does it give it a different... job number?

DAN

44:59 It does not, this is all gonna work under the same job.

--- Parts management (purchase orders) ---

IPHONE

45:04 So where's the job number for this job right there? Yes. Okay. And then can I remove that option then for them, to add to this job?

DAN

45:19 Yeah. You don't have to give them the option to add to it. You can keep that for yourself. Okay? And they wouldn't even see this view.

--- Access to information ---

DAN

45:30 Matter of fact. Let's jump out. This is probably a good time to do it. Let's jump out to the mobile app technician view. And I'm gonna Zoom in a little bit here. But this is their schedule. So this is what they've got and these have been scheduled. So you can see eight am, 915, eight am.

--- Dispatch ---

DAN

45:48 And what I could do is filter by today. So if I've got things that are scheduled and they have times that will show up, okay, their only job today is at four. But in the case that what we were just talking about with the maintenance calls and such... they would show up right here. So unscheduled. But they have been assigned to this technician. So this is only jobs assigned to Dan, right? This isn't just everybody's jobs. And as I would like, I can just go ahead and pick up these jobs. Is that how you anticipate scheduling working for you all?

IPHONE

46:25 Yes, for the most part, yes, just... I'd say maybe about 40 percent of the time, the guys, you know, may know where they're going the next morning or for the full day. But a majority of the time they're between service calls or having to reschedule things because of emergency service calls, their schedule kinda gets bounced around a little bit, you know, it changes, you know, transferring jobs to other technicians. A lot of that happens throughout the week.

DAN

47:03 Well, this could be something very helpful for you with that being said with, yeah, they're able, to pull this up. So let's say they do get called away from a maintenance job and they just need to go across town to an emergency. They could pull up a map here and take a look at. So here we are and this is let's say this is the job I'm at now, it looks like I've got something right around the corner and pull up information on. So 25 appointments at that location. Obviously, that's not going to be accurate for what you'd see most of the time, my demo account can get a little flutter sometimes but take a look at the appointments that were due close by. So for appointments over here, we've got some overdue maintenance that are in red here, you see, and so they could pick up jobs this way to make the most of their trip across town.

IPHONE

47:56 And they would see everyone's workload or just the round.

DAN

48:01 So I believe you can set that. I'm not 100 percent sure to be honest. So with the nearby jobs, I think with the map, I believe that if it's got the extra little figure there, that means that it's been scheduled and maybe somebody is on task for some of those appointments. So let's look at. This. Looks like it's. Already got shell be assigned to this appointment and it's scheduled for eight a M on five eight. So she never made it looks like but it was scheduled. And then the ones without... the figuring there look to be unscheduled. Yeah, we don't have a time or date for these... and that may be something I'd have to double check.

--- Access to information ---

DAN

48:49 There are a lot of rules and permissions you can set up for the mobile app. So that may be something that you can edit to where they can only see like jobs that were assigned to them and have not been scheduled time yet or something like that.

--- Tech On-site ---

DAN

49:05 All right. Well, let's jump into the work order here. So for the tech simple layout, they're going to have the assets and services that they're here to perform up in the top left first and foremost, though I'm gonna go ahead and punch in clocking in as in route and nice for the customer to go ahead and just send them a reminder.

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

DAN

49:26 So I'll send to you, Claudia. I'll be here in just a minute. A great way to put your brand in front of the customer, puts a picture of the technician there as well. They know who to expect keeping you guys top of mind with your customers. But once you have arrived and of course, that's optional, you don't have to send that.

--- Assets ---

DAN

49:43 But once you've arrived, you'll just punch over to clock in on site. You can see the services that I'm here to perform. Looks like we got a refrigeration unit and four H back units. Now, the asset information... this, these are the assets we're here to work on today. However if there were other pieces of equipment that I needed information on while I was on site, I could take a look at everything that we work on at that location. All of that will be available to me. And when I open up an asset for the tech, we wanna give them all the information, they need to be as effective as possible. So service history is available. They can pull up all jobs and look at pictures, and labor what was done last specifically for this asset deficiencies. So those are the repair opportunities, right? Whether they've been fixed or if they're still open... attachments, pictures, video location map here. You can pull up different things, and notes about the customer. Could also include PDF manual or guide for how to use the, or how to operate the equipment. And if there are any comments specifically tagged on this, those are the land here as well. And of course, make model. So, number filter sizes and such?

IPHONE

51:08 Okay. Great. Like how detail that is?

DAN

51:12 Awesome. What, what would that benefit for you all, what the asset information being detailed like that? Would that provide, any sort of benefit that, you think?

IPHONE

51:25 Absolutely. That's a plus that I'm looking for because that's something that our software now provides us. There's a space for us to add all the customers equipment information? Okay? And yeah, this one is a little more sophisticated than what we have right now. So that's a huge plus.

DAN

51:49 Awesome. Yeah, it's good to know what you're working on, right? And we looked at those comments at the location level back in the office. So I think there were 13 of them. And so here, it looks like there were nine technician comments. They can also leave job comments or leave a comment on specific services. But these are those location comments that show up automatically every time there's a job created here for location. So things like bring this specific tool set or gate codes, that type of thing.

IPHONE

52:22 Okay. Do those comments usually, is there a limit, do they get out of hand?

DAN

52:29 Yeah. So you can delete them. And I mean, there's not a limit. You could add as many as you'd like. But for example, we've got gate code and then we've got, I think updated gate code.

--- Assets ends ---

DAN

52:40 So these are all, we can combine those three into one. So probably, you know, somebody at the office, maybe it's easier for them to do it or if you had, some texts that were really good at crossing their eyes, and others backwards. I said that, but, they could delete these right here as well.

--- *Deficiencies* ---

DAN

53:02 So when a technician finds a repair opportunity, they're on site and they've come across something they need to recommend or something that needs to be quoted. This is going to be the process for that. So they'll add an efficiency and we'll start with the description compressor needs replacement. Now, I don't have to be too specific there with the details because it's going to prompt me. The next step would be to add some photos... which I can also tag some notes in on if I'd like to. And I'll add a video. So these are going to be for the customer obviously to see what's going on and to understand your recommendation but also can be for the office. So the office knows what to put together as far as a quote goes. So that's obviously picking up audio, but I could also drop in a audio memo if I'd like to. And there's no limit to the attachments here. So I'm gonna mark the level of severity. And the nice thing about this is that you're able to spot minor repair opportunities. So something that, for the naked eye, and someone untrained, they might think everything's working fine, but you all understand that in three months, this equipment is probably gonna turn into an emergency call. So you can suggest minor deficiencies and you have deficient, things are still working and inoperable. So everybody probably knows it's broken down. We'll tag this one as inoperable. We'll tag the asset here. And that's going to automatically update the type of equipment it is on that next line. And then the status. So if I were to fix this here on site or verify it with a customer, I can market as those status is in this case, this is new because we need the office to make the next step as far as the proposal goes... generate quote for customer. So you can provide, I guess that wouldn't be the proposed solution but additional notes and proposed solution below. If necessary. A lot of times the video and attachment will collect that. And since I've tagged the asset information, all of that data is going to be available for the office. So there's no need to write down specific types of parts, or whatnot because we already have that recorded.

--- *Recurring maintenance* ---

DAN

55:27 So before we jump back to the office and take a look at that, I did want to. So obviously we're tracking on time... for these maintenance based on the services you set up right in the automatic, you know, maintenance generation of the ticket. We already know what kind of labor it's going to be.

--- *Tech time tracking* ---

DAN

55:47 If this ended up being a Saturday, they can make an adjustment. It could add a different part item or labor where if the hours you didn't want to add those you want to detect to do that manually each time, you could leave it that way as well. So an

option here, the technician is just going to mark this as used and that's automatically going to source it from me. So that will apply my labor rate and my margin to make sure it's correct. Now, let's say they're on over time... the text just going to add over time. We'll select one of these labors. Just this one here. Looks good.

DAN

56:27 And item source, well technician. So it's already got me sourced. So I'm I was here for three hours and I'll add that to the job.

--- Tech time tracking ends ---

IPHONE

56:45 Now that's the preventive maintenance. So all... our cost is a fixed. How would that work?

DAN

57:00 Yeah. So that's even easier because this way the tech is just gonna log the hours they work rather than having to worry about the customer getting those updates. So the services here, you see, let's see, let me go back to job items.

--- ST app contracts and pricing ---

DAN

57:13 So it's a fixed cost. So you're already, you know, it's fixed that we're going to be charging them for this amount of labor. And so what you all need to know is just how much to pay the tech? I understand that correctly?

IPHONE

57:24 Yes.

DAN

57:25 Okay.

DAN

57:30 So that you'll see the text hours here, but you'll also understand... already the fixed cost, for the contract or for the maintenance based on the service that was set up.

--- ST app contracts and pricing ends ---

IPHONE

57:43 Okay.

DAN

57:49 And so let's jump back to the office side and we can let's see I might have shared the wrong thing here. There we go. And we can take a look at how it comes over and how I would generate an invoice from there and all that good stuff. And I know we're running up on the hour. I've got probably about 10 or 12 more minutes to get through, the quote, the invoice, and the time tracking, are you all running short on time at all? I wanna be aware.

IPHONE

58:22 Even, are you?

YVONNE

58:23 No, I got, the 10 minutes or so.

--- *Customer engagement* ---

IPHONE

58:27 Okay. So it away?

DAN

58:29 All right, perfect. So... first and foremost, I want to show you so... the efficiency that was reported, you can set these up as email notifications to go to maybe your sales people or whoever is managing those quotes and dealing with getting quotes in front of customers and repair opportunities.

--- *Deficiencies* ---

DAN

58:50 So this report is formatted in a way that's really easy for the office or whoever is handling that right, to get a quote out quickly. It's also gonna pull all previous deficiencies from this asset specifically. So if we're replacing the compressor every year for this unit or we've got broken fan, broken this broken that it'll give us a great understanding of how to make the proper recommendation here.

--- *Quote templates* ---

DAN

59:12 Maybe we need to replace the unit entirely. We've got our attachments that have come over... all the information pertinent to the job. So all I need to do is add to a quote, I can select an expiration data if I'd like to or just do that later. If I need to make any edits or adjustments I can. But everything's going to be pre filled based on Dan's report. So when I generate this quote and this is the same way that service type templates would work. If somebody calls in for a service, you can have as many templates as you'd like. So you've got quote templates in this case. So for a compressor replacement, I might have a few, our standard compressor replacement, the explanation for the customer, the labor that we expect the refrigerant right? That everything that's going to be needed for this job. So we're going to apply that. Now you're not locked can if there's a little bit of a update that you need to make, maybe we need to add a part whether it exists in your system or not. But you can add that,

it'll automatically mark up but not every compressor replacement the same. And you can make that adjustment. So you'll see here I've got a margin of 44 percent and it's automatically applied the contract pricing for top golf. However if I switch this to let's say the pains demo contract, you'll see my margin adjust.

--- ST app contracts and pricing ---

DAN

1:00:34 So your different pricing mark up rules for different customers. And so it's automatically marked up for top off. But if this is a brand new customer or you need to change the pricing really simple to go through your contract lists here and select the correct pricing. And even further if you wanna make an adjustment, maybe this customer is just a paying today. You can go ahead, and make custom pricing for that part. And so you're not locked into the contract as well. It will flag you though. And so Claudia, this is where, what we're looking at earlier with the contract where it said line items a grand total. Only, this is where it automatically has applied that, that's, the visibility detail level for the customer.

--- Quote templates ---

DAN

1:01:23 And so you can make that adjustment here. But it's gonna always market as that for this customer unless you change it otherwise. So if you want to go grand title only or line item with detail, there's 12 different ways to present this to the customer. So, whichever the case may be.

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

DAN

1:01:42 So that's it though I should be good to go with this quote. The last step is going to be whether I need to toggle on or off any of these attachments. Maybe some of them were internal. In this case, we will leave everything for the customer and I can send it out to as many compacts as I would like. For time purposes. I'm just gonna let Claudia forward this to you this time around Ivan, but I'll also pull it up on the screen and this is what the total looks like for your customer.

IPHONE

1:02:15 Great. So those quote like quote numbers will generate differently than the invoice numbers. It's two different sets.

--- Parts management (purchase orders) ---

DAN

1:02:25 That's...

IPHONE

1:02:25 Correct. Okay.

IPHONE

1:02:32 Then the reoccurring jobs just to kind of backtrack a little bit, those will just be normal invoice numbers, right? So they'll just generate from where the invoice list is at. Are those, is that a separate set of numbers?

DAN

1:02:49 So you'll have a job number, book number, an invoice number, deficiency number, and they'll all be sort of linked to each other, right? So, I'm not sure if that necessarily answers your question, but a lot of times people are kind of working.

IPHONE

1:03:05 Yeah. When the PMS generate, right? I'll have them automatically generate. They're going to generate invoice numbers from wherever we left off.

DAN

1:03:16 They will not generate an invoice number.

IPHONE

1:03:19 They will, not an invoice number. I'm sorry, a job number?

DAN

1:03:25 That's correct? Yep.

IPHONE

1:03:27 Okay.

DAN

1:03:28 They will automatically generate the job number yep.

--- Access to information ---

IPHONE

1:03:31 Okay. Perfect.

DAN

1:03:36 And... I'm gonna clock out of the app here. So I don't know if you've got just a moment to open this up on your phone or if you've got another screen. But if you open it up on your side and kinda take a look at it from the customers view service trade is gonna track the red receipt.

--- Quoting ---

DAN

1:03:55 So you can see when customers take a look at the quotes. And sometimes it's nice to see, you know, as you approve it, what it would look like for the customer. But also what comes back on your end as far as, you know, moving that into a job, converting it over?

--- Quoting ends ---

DAN

1:04:14 Would that be easy enough for you, Claudia to open it up right now or?

IPHONE

1:04:18 Yeah, I'm opening it already opened a clear click here to view. Approve. Okay, perfect.

IPHONE

1:04:29 Gonna get past my security on my phone.

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

DAN

1:04:41 So as you're doing?

IPHONE

1:04:43 Then we could add a purchase order number.

DAN

1:04:45 They can, yep... and you can make that a required field or optional totally up to you.

IPHONE

1:04:56 Okay. So then they're not signing anything, they're just approving that.

DAN

1:05:00 That's right? So you'll have the quote terms and conditions.

--- Tech On-site ---

DAN

1:05:02 And by checking that box, it works as an electronic signature essentially. And some folks might have maybe your agreement says that you need to get a signature on site before you start performing the work. So that can be noted in the service. And the technician can get a signature every time that they go out.

--- Quoting ---

DAN

1:05:22 It looks like you've approved it and you'll see here on my screen that I've got visibility on when you opened it and your purchase order number when you approved it. So for me, all I need to do is create a job from this quote, copy all the attachments over. We'll give the job a due date. Let's say we want to get it done by the end of the month... and we'll create our job. Now, this is automatically pulled in the... asset. It goes, it links back to our repair quote and links back to our deficiency, which obviously links back to that initial job here's.

--- Quoting ends ---

DAN

1:06:03 Our expected items, the attachments that came along with that initial repair report, all the information up top here. And if I want to go ahead and assign this to Adam, I don't need to schedule it. He'll get paying that he's got a new service that he needs to get done by the end of the month.

IPHONE

1:06:24 Now, how does this not work for the bigger jobs that I had mentioned with our controls team?

DAN

1:06:32 Kind of like you mentioned with the comments, I think you remember earlier, did the comments get to be a lot? I think that eventually, which is why we recommend, you know, the really our limit is about a year.

--- Type of work ---

DAN

1:06:46 And in our project capabilities, I wouldn't say it would be a long shot to say in two or three years down the road, that we'll be handling long Construction, you know, three years, but also some of those things if you're working with GC, right? A lot of sub contracting in there while we do handle some sub contracting, it can just be, it can get to be a lot on one page essentially and a lot of data, so becomes a bit cluttered. Really.

--- Type of work ends ---

IPHONE

1:07:14 Okay. Thank you for that answer.

IPHONE

1:07:21 So it's a space?

YVONNE

1:07:22 Issue. You're saying a space issue on the page itself. It's not really a capability of something that the program doesn't provide.

DAN

1:07:31 Yeah. Well, space, but more so it's I think the organization of it, you're just going to be looking at a lot of numbers when you only need, you might want to just be looking at a few, right? And there's not, I don't believe there's a good way, to break it down further. You know, once you get over three, four quarters of different work, I think it just gets to be a lot.

DAN

1:08:01 I can double check though as far as.

IPHONE

1:08:04 I mean, the clocking in and out, the biggest time frame would be a year. Okay? The longest, is that what you were saying?

--- Quoting ---

DAN

1:08:12 Yeah, that, that's what I'm always told to recommend. I could double check again though with our team and, you know, get a more specific set of reasons why we don't recommend it for that, if that would be helpful.

IPHONE

1:08:25 Yeah, that'll be great. Thank you.

DAN

1:08:28 Absolutely. Yeah. And I know we're so wanted to also with your quotes and efficiencies and getting back to, the, you know, generating pool through revenue. This is a big pipeline tracker essentially for all of the repair opportunities and quotes that you have. So I could look at, let's say all of the quotes that were submitted to a customer and obviously a lot of fields here for me to report on but submitted and the customer hasn't even opened them up yet, right? I can mark just the inoperable ones. So there may be low hanging fruit equipment that is broken, run that search and I get nothing back. Excellent. So let me clear that, run that search and we've got a few repairs out there that no one's even opened and just send them all right back out of the customer, get them to the top of the inbox. But the quote will fall into a status and it's really easy for you to follow up and track and report on the stages of your revenue opportunities here. So for management visibility perspective for your sales people, your account managers work in accounts. This is a great tool to drive more revenue.

--- Deficiencies ---

DAN

1:09:38 And that goes the same for all of those deficiencies reported. So if it's resolution is new, that means no one's attended to it yet. So you're making sure that every time a technician documents repair opportunity that your management team has visibility that these are moving from reported by the tech to getting in front of the customer and you can report on the timeframe in which that takes.

--- Purchase decision ---

DAN

1:10:06 Does that look helpful?

IPHONE

1:10:07 For you all? No?

YVONNE

1:10:11 So, yeah. Before we break, can I have a question, Cody? I don't know if you've asked this already and I have the answer, but, why choose you guys over some of the other products that are pretty similar out there. What do you guys provide that you think that other competitors don't and some of the ones I've kind of come across are BuildOps and ServiceFusion. Okay?

--- Type of work ---

IPHONE

1:10:41 Yeah.

DAN

1:10:42 Well... you know, it's a great question. And so for us, I think one of the ways we differ from ServiceFusion would be that we don't take on residential contractors. We are specifically built for commercial industrial contractors. That, that's the only type of businesses that we've worked with over the last 10 plus years.

--- Type of work ends ---

DAN

1:11:04 So, we really know your business and we know what, what's going to help you make more money in the current climate? We've also been doing this for 10 years. And so we've got a lot of experience versus the BuildOps which is relatively newer to the space. I think they've got some learning to do along the way and, but we've been through a lot with our customers and our customers have helped us improve the product to fit their model. And yeah, I think out of those two spec, typically those would be two great reasons. Also, as far as, you know, there are a lot of software out there that they're going to help you with scheduling, right? They're going to keep track of job numbers. They're going to help you collect time.

--- Customer engagement ---

DAN

1:11:46 But again service trade really at the core of our platform is built to engage with your customer, put your brand in front of the customer. So, for example, a quote that's one click approval, really simple for the customer, attaching media like this for the customer. As far as the, let me see if I can't get back to that maintenance job, but getting a service link, a service report out to the customer. Again, keeping them in the know. And we mentioned the customer portal earlier, the in route notifications, but a lot of our platform and a lot of our research and development goes into making our platform user friendly for your customers. So engaging with them definitely helps to build trust and grow your business.

--- Purchase decision ---

YVONNE

1:12:32 Okay.

IPHONE

1:12:32 Thank you.

DAN

1:12:36 Have you demoed with the other two yet? You?

YVONNE

1:12:40 A couple of them? Yes, yes.

IPHONE

1:12:44 What were?

DAN

1:12:44 Your thoughts? Is there anything that you liked better, or stood out to?

YVONNE

1:12:49 That's the thing it's you know, I have notes that because I've been kinda going through a lot of them recently. They're blending a little together, which is why, you know, when it comes from your perspective a little bit more.

DAN

1:13:06 Something I can do to help not make them blend together which is, I know that we're sort of running towards the end here as well. I was hoping to get to an invoice which I can still do, but, I think you mentioned you you've just about got to go Evan. But what I'd like to do is set up this workspace which I've started to do during our meeting today, but obviously, I'll fill this out a bit more and I'll share this with you all. And this will also allow you to share it with other members of your team that you'd like to bring into the conversation. You can do things like drop comments for me, ask me for additional resources. But basically this will track, you know, the steps

that we have completed. So today we did our demo, what are we going to do next? As far as our next meeting? You also be able to catalog all of, the meetings that we've had, what was discussed, sort of review, the recap and the... what makes us stand out, right? Key differentiators for service trade. So would this be helpful for you all?

--- *Purchase decision ends* ---

YVONNE

1:14:04 I think so. I would, yeah, have you guys already discussed pricing, whether it's a subscription model and et cetera. What, what the monthly fees are?

DAN

1:14:16 We have not.

IPHONE

1:14:17 No, Daniel said you would cover that the end. Absolutely. I know. Sorry, Van, I know we're kinda running over?

YVONNE

1:14:27 No, no worries. No worries. I'm just.

--- *Purchase decision* ---

DAN

1:14:29 Yeah. And, I hate that we didn't get to it all. Sometimes it's hard to fit it all in and I mean, it's rare that I'll have one meeting and have someone ready to make a decision. So, I think that, you know, probably it would be good. I know you mentioned get the owner to sit down as well, but I feel like we might need to touch on time card and we didn't quite make it to an invoice today. I definitely can share some information about that in our workspace there. But would it make sense for us maybe to sit back down in a week or so and go over, the time card and pricing.

IPHONE

1:15:05 For me, it would, yeah, if we could do something in exactly a week, move on if you're available?

--- *Tech time tracking* ---

YVONNE

1:15:12 Yeah, I can check my schedule and see.

DAN

1:15:15 Okay. And what I'm gonna do is add a tab here on the left that says time card. And I've got four videos. Each one is about two and a half to three minutes. And what it'll do is show you the technician workflow, the customization.

--- Tech time tracking ends ---

DAN

1:15:29 So setting it up in the first place, it'll show after it comes through to the office, the workflow for receiving and approving. And then it will show pushing it, you know, that report that finalized report to your payroll system. So those are the four different videos. So I'll create a tab here in the workspace, and you can check those out.

--- Pricing ---

DAN

1:15:48 And I think from what we looked at with the demo and then think those, you probably have a couple more questions but a lot of times that help to fill in the gap. And we can even set up a time card specific demo if need be.

IPHONE

1:16:01 And the higher end I saw it is 189 per check per month.

DAN

1:16:06 That's correct. And I'll put a pricing tab here as well. But the higher end and so the enterprise, let me get back to that pricing page. Where do we go? Where did we go? There? We are, so the enterprise really, the main difference here which might be good for you because it does include time card. Otherwise the time card is an additional 14 protect per month. So you'd be looking at 154 protect per month by adding the time card. So it might make sense to go ahead for the enterprise that's also going to give you a higher level business analytics reporting.

--- Pricing ends ---

DAN

1:16:38 So this can be one of the things we sorta discuss on our follow up, some of the differences and I can try to point some of those out to you as well with the workspace there.

IPHONE

1:16:50 Well, if we wanted the reoccurring contract invoices, that would be enterprise as well, correct?

--- Dispatch ---

DAN

1:16:57 That's correct and geographical regions. If, if you're gonna schedule, continue to schedule the way you're scheduling. Currently, what you could do is set up based on zip codes, essentially assign a technician. He's gonna cover these three or he or she is gonna cover these three zip codes and have those just automatically.

DAN

1:17:14 Any customer that calls in for that, whether it's a maintenance call, service call, whatever it might be, it could automatically assign them, you know, and go from there. But that can be a helpful tool for you as well. I will say typically, I recommend starting at premium just because obviously, it does take about 60 to 90 days to implement service trade. So what you can do is implement, get your feet wet, start using service trade, start collecting the data that you'll need to make use of some of these tools. And then you can always upgrade, right? It is an annual contract, but you can upgrade prior to that. So you can do it in three months, you can do it in four months, six months.

--- Purchase decision ---

DAN

1:17:56 But if you feel this is better suited for you, and if we determined that then absolutely starting on enterprise is definitely an option as well.

IPHONE

1:18:07 Okay. Yeah. We could go over that our next meeting to see all those inclusion. Okay?

DAN

1:18:16 So, would the same time next week?

IPHONE

1:18:18 Work for you?

IPHONE

1:18:23 It does for me, Yvonne, did you have a minute to look at your schedule or do you want to get back to?

YVONNE

1:18:30 Would work if it was an hour, like if we could stick to the hour?

DAN

1:18:36 Okay. Absolutely. We will do our best and I can even call Claudia in between and make sure you know, once you've taken a look at those time card videos, make sure we've got a specific plan on what we need to cover. So we'll just jump right into it and be as efficient as possible with the time.

--- Purchase decision ends ---

IPHONE

1:18:54 Great.

DAN

1:18:57 Well, I will put the workspace together for you and send that over. You can expect an invite to that at the latest by tomorrow morning. And I'll also send an invite out for a follow up next week and feel free to contact me if I, you know, I missed something or if there's something you have a question about or would like to review internally before our next meeting. But something I always like to ask what was your, what was your favorite thing about what you saw today?

--- Access to information ---

IPHONE

1:19:26 I'd say the customer information. So those reoccurring jobs... the technician has all that available to them from their mobile phone app. Great.

YVONNE

1:19:42 And for me, I would, since I don't really work on the operation side of things, it's more of the accounting finance side of things. My, the best is yet to come to me, meaning like.

--- Access to information ends ---

DAN

1:19:56 Yeah.

IPHONE

1:19:57 Show me.

YVONNE

1:19:57 Some of, those reports and things like, you know, what I can get, from, what kind of data I can pull, from what we submit, that, that's what it's gonna be, the fun part.

IPHONE

1:20:10 And I've been starting, I started this conversation the other day with service telling them that I was kind of the stepping stone making sure it was, you know, operations wise, great for us and our team, but that there was a second step with accounting and.

YVONNE

1:20:27 Then of course, the last step with a.

IPHONE

1:20:29 So it's a process and I appreciate your patients, Dan. Yeah.

DAN

1:20:34 Absolutely. And I appreciate you all the time and your patience with me today.
I know we ran over a little bit.

YVONNE

1:20:41 All right. Thank you.

IPHONE

1:20:42 So much at.

DAN

1:20:43 Thank you. All right. Talk soon.

IPHONE

1:20:45 Okay. Yep. Bye bye.

The End