ServiceTrade Demo with R. B. Akins Company

Susan Warren with R B Akins Co
Recorded on 10/4/23 via Zoom, 1 hour 44 min.

Participants

SERVICETRADE

Susan Warren
Territory Manager

Chris Resta
Associate NorthBoundary Account Executive

R B AKINS CO

Michael Akins
Inside Sales

Topics

Transcript

MICHAEL

0:00 Alright. Can you hear me now?

SUSAN

0:01 I can. Good morning.

MICHAEL

0:03 Wonderful. Thank you.

SUSAN

0:06 All good. Anybody else joining us today?

MICHAEL

0:12 So, I've got...

SUSAN

0:19 Very soothing music. I don't know what's going on but...

MICHAEL

0:22 We're using this super old conference room like TV slash computer. And I don't know, I must have clicked a weird button. I'm trying to figure out how to get out of it, my apologies.

SUSAN

0:36 I...

MICHAEL

0:37 Like I...

SUSAN

0:37 Would almost all of my demos begin with some sort of Zoom conference room troubleshooting? So you're in good company?

MICHAEL

0:46 All right. I've got Jeremy in here with me. Jeremy is our future service manager after a few years, he will be completely in charge and Jimmy may or may not be joining us, that's our current service manager and that I'm Michael, I help with.

--- Type of work ---

SUSAN

1:04 So, very good. You say you help with software? Are you like a consultant or?

MICHAEL

1:10 No, I work full time here. I'm just the son of the owner and I wear a lot of hats.

SUSAN

1:17 Gotcha. Yeah. I would say about half the time. I'm working with, you know, family businesses.

--- Type of work ends ---

SUSAN

1:22 So, always glad to see that. Well, it's really nice, to meet you both. I appreciate you guys taking the time basically, the game plan today. It sounds good to you all is I wanna take a significant chunk of time to learn more about your business, what your goals are, what you're hoping to achieve with a tool like this, give you a couple of minutes of back story about service trade.

--- Purchase decision ---

SUSAN

1:45 And then of course, spend the bulk of the time actually showing you around workflows. And if you like what we see we can, you know, make a plan for next steps. Sound good?

MICHAEL

1:53 Yep.

SUSAN

1:55 Awesome. Well, I got some great notes on your conversation here today with Chris. Just wanna kinda go through confirm some of that with you now.

--- Type of work ---

SUSAN

2:07 I'm seeing here right now, you know, it's primarily a sales organization with a service department, would you say that's accurate?

MICHAEL

2:17 Yes, correct.

SUSAN

2:19 Okay. And you guys are currently at three technicians out in the field, but we're hoping to, we're actively searching for a fourth right now?

MICHAEL

2:29 Absolutely. I check.

SUSAN

2:32 And... if I had like a secret stash of qualified mechanical workers, I would not be selling software to... you. We joke about that, but that is one of the things that service trades kinda designed to help solve for because we can't bring you more bodies. I should rephrase that, but we, you know, we can, you know, help make the folks that you have more efficient. So, I completely understand that. Are you guys strictly commercial or do you do any sort of single family residential?

MICHAEL

3:12 Commercial?

SUSAN

3:14 Gotcha. And primarily H fac with a little bit of generator. Am I missing any big stuff there?

MICHAEL

3:22 I threw in... power stuff and random stuff that primarily age. Yeah, primarily age. Yeah... I don't actually know what the excels tell you the truth and what we serve, no generators yet, but sounds like that may be on our horizon one day, maybe.

SUSAN

3:45 And you guys are with the, in thinking about that department. We're strictly focused on service, not installs. I saw that in the notes, great. And of the service work that you're doing thinking about, you know, job volume percentage, what percentage would you say is proactive that recurring plan maintenance work? And what percentage is more of that reactive repairs?

MICHAEL

4:14 Yeah. Good question. He ask me. I was gonna say 50 50, but for Brian more like 60 40 40 percent being like PM.

SUSAN

4:25 In a perfect world, what would that percentage be?

MICHAEL

4:32 That's a good question. I don't know. Talk about that.

SUSAN

4:37 I mean, would you rather have more people call you up and say, hey, I need repairs or hey, I wanna set up plan maintenance.

MICHAEL

4:46 I would say probably plan a, yeah, yeah.

SUSAN

4:52 Okay. And I saw in the notes as well like in, and tell me if I'm wrong about this in terms of, the businesses that you serve, I saw government and schools. Is that accurate? Or?

MICHAEL

5:07 Yeah, we do.

SUSAN

5:13 And tell me a little bit about the current tool that you're using because I saw that in the notes, laser fish and frankly, I am not familiar with that at all.

--- Accounting integrations ---

MICHAEL

5:22 Yeah, that, that's a software, that really has nothing to do with our industry. It's a catch all software that started out as a bridge to get companies from paper storage to online repositories and make sense, added a lot of features. We use their forms like a form fill out in workflow type deal to managing our ticketing. We use an outlook calendar for scheduling and just kinda communication with buyer phones, to everything else. Really, no integrations with accounting for the most part. No, not a good tool for history of service.

SUSAN

6:16 And which accounting tool are you all using?

MICHAEL

6:18 Called Sage 100?

SUSAN

6:25 And is this the first time, this project that you guys have as a company or as you guys rather evaluated software before or have you guys like gone down this road in the past?

MICHAEL

6:39 We haven't gone down in the past. I think you've recently been reviewing just actively right now, yeah.

SUSAN

6:45 Gotcha. And if I may ask who have you checked out recently and who is on the docket to also be checked out?

MICHAEL

6:54 I'll tell you exactly who actually, I don't have the list in front of me build.

--- Purchase decision ---

MICHAEL

7:01 So BuildOps, we've demoed because they harassed us via e-mail. We finally humor them. Impressive set software can't lie about that. There's that list you put together, Jeremy, does any come to mind? Yeah, the, yeah, this will be our second full on conversation and demo so far?

SUSAN

7:28 No. You said BuildOps kind of impress you.

--- Purchase decision ends ---

SUSAN

7:31 Was there anything in particular that you saw with BuildOps? It was just like, wow, like this would be a huge value add.

MICHAEL

7:38 I felt like it was relatively fast navigating via pages and full disclosure. I sat down with a firm just like us that operate up in Kentucky and Louisville, Kentucky, and they use service trade and I demoed it with him yesterday and that's what prompted me to contact you all the BuildOps does.

--- Assets ---

MICHAEL

8:00 That impressed me. I noticed within service trade, specifically the calendar and how it integrates where you can assign text and automatically all the stuff kinda gets sorted where it needs to look in up a history of tickets with the specific job site and it's all there and accessible extensive areas for different types of note taking and documentation.

MICHAEL

8:24 And as far, as far as my future role goes, I think what I was impressed by also was like the dashboard, I kinda like that having that dashboard open, you can kinda see what all is out there.

SUSAN

8:39 Gotcha. That definitely all makes sense. Well, let me ask you this. You know, we kinda covered a lot with that, you know, which I'm assuming is translating to kind of pain points that you're currently experiencing that you mentioned, you know, the ability to access asset history in the field, the ability to schedule things efficiently, and then the ability for technicians to... easily communicate the value of what they were doing while they were at there as well as, you know, just finding information easily kind of all in one spot. What are some other things that are kinda gotta have for you?

MICHAEL

9:25 I assume you have like a mobile app and different things like that.

--- Accounting integrations ---

MICHAEL

9:31 Being able to like trust that... if you don't have service, there's still like a limited version of the app the text can use so they can document things super important. That's our biggest pain point I would say is our current software. You don't really know if what you submitted actually went through and often times it just disappears.

--- Access to information ---

SUSAN

9:59 Yeah. We have a fully functioning off line mode. So as long as you initially get the information on your phone, it'll save everything locally to the app without having to like save it to your cmo role or anything like that, and then immediately sync back up when data is available.

--- Accounting integrations ---

MICHAEL

10:18 Integration with Sage. Yeah, any type of integration with Sage if possible, is a really big perk for us.

SUSAN

10:29 No. Let me ask you to build up, say that they were able to integrate with Sage?

MICHAEL

10:34 They talked about, well, the answer is no, they cannot, they know that, they have other clients that have Sage 100 and they built like custom outputs, that through like a CSV file. Sage will accept the import basically.

SUSAN

10:51 Gotcha. Yeah. I just wanted to be clear because we did have a customer come over from BuildOps after, you know, kind of getting the impression that they might be able to do that connection, but then finding out there. So I just wanted to kinda check in on.

MICHAEL

11:05 Yeah, I don't think I've met anyone not just talking about service software. I don't think I've met anyone that has a great integration, Sage?

--- Accounting integrations ends ---

SUSAN

11:15 Well, I mean, anytime you're it's like two things talking to one another. It's always going to be a challenge because ultimately, whatever Sage decides to do is outside of our control. So let me ask you this about how many invoices is the service department creating roughly?

MICHAEL

11:34 Each, I tried to look this up this morning basically just how many tickets are processing.

--- Pricing ---

MICHAEL

11:41 It kinda looks like. I mean, they'll be a first every Monday of like 20 to 30. Is that sound right? Yeah. I mean, my first thought was 100 130 a month. Yeah. Right. Yeah, that's kinda what I was. Yeah. And then we're going to end up having another tag or tag eventually, so that will grow. Yeah.

--- Accounting integrations ---

SUSAN

12:06 Yeah. And, and I can definitely do a bit of show and tell so, but just kind of I like to kinda get this out in the beginning when we talk about potential integrations with software, with accounting software, I would say until you hit 202 150 Ish and everybody's different.

--- Pricing ---

SUSAN

12:27 And I'm being very general here but that's my rough ballpark number until you hit that number of invoices that need to be sent over per month. That's when it becomes more cost effective in terms of cost per time lost with the office to consider purchasing the accounting integration with service trade.

--- Pricing ends ---

SUSAN

12:47 So, I specifically work with folks that are in the like three to nine technician range. So it's always my recommendation is let's start you off doing the, you know, the bulk sending over. Well, I'm happy to make sure that you're very comfortable with the integration before you make the selection. But then once you're like while this is, you know, becoming a little bit too time consuming that's when I would advise you to pull the trigger on purchasing that integration. But we have... yeah, I really try to take like a consultative approach like we were just looking, you know, to see if there's good overlap.

--- Purchase decision ---

SUSAN

13:26 I'm never going to try to sell you anything more than what you need. But yeah, I would say like definitely hold off on that, but I absolutely understand wanting to vet out and making sure that connection works. Well. Talk to me a little bit about your, what your current technician experience is and how you're hoping to kinda elevate that with a new tool?

--- Purchase decision ends ---

MICHAEL

13:54 Yeah, this is your term.

SUSAN

13:56 Where...

MICHAEL

13:58 Where do you start? I just, it's just not efficient at all for anybody. I don't really know how to start. I mean, we worked a lot of the bugs out. Michael has for sure as fish was definitely painful on the connection point on the app. It's just painful.

--- Access to information ---

SUSAN

14:22 Yeah, I real, I understand that. So let me ask in a different way is because I don't know anybody that doesn't want a super efficient clean, easy to use mobile app for the guys out in the field. I would ask the question of what do you feel like?

--- Paper process ---

SUSAN

14:45 What aspect of their day is taking up too much time that you feel like is keeping them from potentially getting to another job every day?

MICHAEL

15:02 You know what I wonder about Jeremy is specifically... the, and truthfully we probably could have readjust laser fish to do this but it still wouldn't be what service trades offering, the ability for someone in the office to get a ticket started just to take out a lot of the data entry of tech who's like in his truck waiting to go somewhere else... having certain information pre populated.

--- Forms ---

MICHAEL

15:31 So, it's mercy hospital. You know, we don't have to type all that's. Almost cursed all that stuff. And over and over again when a lot of is pre populated, yeah, that does take a lot of... data whether it be addresses job information, model numbers. Yeah, that's my first thought.

--- Forms ends ---

SUSAN

15:59 Well, it's good that you mentioned that because I'm always, I'll sometimes run into folks and like, yeah, you know, like per, wanna check out the demo and they're like I want text to do everything out in the field and I don't want the office to hardly have to do anything. And we barely have anybody in the office. And frankly, if that's the case service rate is not a good fit for you. We, we want the text only focusing on like when they're in the mobile app. The only thing I want them doing is describing, what a customer needs and demonstrating what value they brought while they were at there in terms of like, you know, what they're expected to do on that appointment, the parts that they're expected to use going into that appointment, we want that to be templatized and easy for the office to put in advance. Would you say that like that would be the goal? Yes?

SUSAN

16:58 Now, what have you heard from folks in the office in terms of what they're hoping to improve upon?

MICHAEL

17:07 Know... so question for you, Jeremy, a lot of the firms you talk to, they got service managers, they got service coordinators, both of those are in the office. Are you basically both of those things? Is Tammy kind of also the coordinator? Not really a pretty much primarily contracts now. But as we grow, yeah, I do foresee that. Yeah, we'll end up and the roll up for right now with three or four guys. So to your question, it'll be pretty much just me. There's really nobody going to be involved in using, the program. I wonder on the invoicing side, there's probably improvements there that I'm not even thinking about... like how things flow from Tammy to Lisa. I don't even know that currently, I don't know. Yeah.

SUSAN

18:08 No. With the I'm assuming that would be you, who would be, you know, putting in for each appointment? Like what's expected of the technician, what parts they're expecting? Is that something that you expect to be? Are you expecting to spend the majority of your day at a computer or are you expecting the majority of your day to be out in the field?

MICHAEL

18:32 I would say half and half, I mean, I do expect to come in here and get the day started in the office.

--- *Access to information* ---

MICHAEL

18:38 And then as the day progresses, then if I need to go out in the field, I definitely need to have that option.

SUSAN

18:47 Good. In that case, just wanna make sure you'd be open to this. I would strongly recommend because a lot of the functionality there's because there's two views of service right right there's. The app that we want the text living in. And then there's the office view that we want the folks, you know, doing your type of work, you know, adjusting schedules, keying in information on appointments, all of that, that's really more the office view. So I would strongly encourage the use of a tablet for that.

--- *Purchase decision* ---

MICHAEL

19:14 Just...

SUSAN

19:14 Because the nature of it. Okay. Perfect. Now, talk to me a little bit about the decision making process for this. Like let's say, you know, well, are there, let me ask this like so I walk you through and you're like this is fantastic. You have met all of these needs that we have met out. Are you, are there still other demos on the calendar that you would feel like you would need to check out? Or would then, or will we conversely just go into an evaluation of us versus BuildOps?

--- *Purchase decision ends* ---

MICHAEL

19:59 I don't know. We do have a list. I found the list. I'm happy to share some names that we just carry across pretty much when you Google a service, these names just pop up like service tighten. They, they, they're always the first pop because they pay probably for the most.

SUSAN

20:18 Have a large budget?

MICHAEL

20:19 Yeah, like if you use Google service type is always first, we have not scheduled any demos. We might full disclosure. I am, I'm anxious to see what ServiceTrade does though, knowing that we have peers that use it and are successful with it.

SUSAN

20:43 And the reason I ask is, you know, I do this all day every day, right? And a common trap that both parties, both me and, the prospect if you will, that can happen is sort of an analysis paralysis situation because there's all, you could literally spend, you know, months and months a month like trying to evaluate every single software. And so, it's kind of my job to be a little bit of a sharp in terms of that to, you know, kind of help you because, we want you to look at other stuff.

--- *Purchase decision* ---

SUSAN

21:17 We wanna make sure that we're the right tool for the job. But also, you know, all, you know, time kills all plans. So, I guess my question would be is, you know, like let's say like does this plan sound reasonable as, you know, again the hypothetical, you love, what you see today.

--- *Purchase decision ends* ---

SUSAN

21:36 And then you're like, you know, what I want to check out like let's check out two other options. You know, what would happen after that in your end? Like, who would need to sign off on this decision making?

MICHAEL

21:50 I got two ways to answer that question. The first thing is we have a, we have a date that we really put our feet in the sand by November 20 fourth to have selected something not necessarily implemented but selected... to more directly to your question.

--- *Purchase decision* ---

MICHAEL

22:13 I think Jeremy right here, Jeremy is primarily like, he's the one that has to live in it. Moving forward. Jimmy's only here for so much longer beyond what Jeremy is most comfortable with. Obviously like we gotta talk to our owner and make sure price point is okay. And he's comfortable with it... from my perspective that's it. Yeah.

SUSAN

22:39 Yeah. And the reason I say this because statistically if they're you know, for us for a, you know, a business around this size, if the evaluation period, you know, kinda goes on past like several weeks, then typically it kinda gets shelved. And so, I guess my question would be is like, is there any chance of this of being like something came up? And, you know, late October, let's deal with this in Q1?

MICHAEL

23:10 No, I get what you're saying. I think we're ready. I mean, I don't see the reason. I think, yeah. So our thought is if you're gonna grow, it's only harder to implement the software. The more text, you have more people you have to teach at the same time, any bugs, you're trying to figure out, let's get it all done now because we are actively trying to hire people. And, yeah, yeah, November 20 fourth, I'll commit to that.

--- Type of work ---

SUSAN

23:40 Gotcha. That, that definitely makes sense. And then the last thing I kinda wanna touch on before we kinda get into it is we talked very briefly about planned maintenance... in terms of that, like, is it a goal to increase the amount of repair revenue that you're getting from those planned maintenance visits?

--- Type of work ends ---

MICHAEL

24:07 Yeah, I don't see why it wouldn't yeah.

SUSAN

24:10 I do. And are you guys kinda just like when folks find those opportunities? Is that something they're just like texting you like pictures and that kind of thing?

MICHAEL

24:21 Not yet, but I do have that. I mean, I thought about that for future. It's hard for me to make a whole lot of changes right now in the role I'm in. So, yes, is it something I thought about for sure? Is it something we're doing now? Yeah, I could foresee a year from now when Jeremy is completely taken over, our current service manager could remain, in a more like a sales role. I don't do, we, would you consider anyone really service sales? No, but is it something I thought, yeah, yeah. And within a year, service sales actually has a place within our company. We, we're in a position where, and you've probably heard the story before where our biggest sales customers are also large servicing customer, companies, right? And, you know, as time goes on, markets change, we're a small good old boy market in Oklahoma, but it's changing and we're willing to pursue more service. Definitely, I look at it that way.

SUSAN

25:26 Well, and you're definitely on the right track because we don't know what the economy is gonna do and what happens on the economy tags people stop buying big equipment, they stop doing big projects and they just need to keep what they have running. And if you've already got that set up to streamline, where you're selling

more planned maintenance agreements and you're you know, you're just reaching out to people when they, when things, you know, need to be fixed, you're recession, proving yourself. No, the thing I will say like in regards to that, you're talking about like sales people, we feel like it's ServiceTrade job, not necessarily to turn your technicians into sales centric people, but just as better observers and note takers of issues because we feel like your TAM, eyes and ears are your biggest resource.

MICHAEL

26:12 So...

SUSAN

26:12 If we can just grab that... any other big, very, sorry that just to clarify in terms of decision makers, it would be a two. And then I'm sorry, I totally blank on his name. You just said it.

MICHAEL

26:29 Jimmy.

SUSAN

26:30 Thank you. And then your father, the owner.

MICHAEL

26:36 Would...

SUSAN

26:36 Be, would be the four but no other, you know, kind of surprise accountants that could show up. And no, we must have so. And so, okay, fantastic. You'd be surprised how often a surprise account shows up? Gotta ask well, very good. Any other big picture questions for me before I give you a little bit back story about service trade?

MICHAEL

26:58 No.

SUSAN

26:59 Awesome. I'll have to do it. I'm going to go over here and share my screen?

SUSAN

27:13 So on this navy slide, you see some fun stats about us. So we have been around for we've just celebrated our 11 year anniversary. We now have 1,300 active accounts. We've helped manage 13,000,000 assets, a K pieces of equipment for our customers. We help them invoice for seven point 5,000,000,000 with a B dollars. But my favorite thing is that we're in just over 10 percent or our customers are servicing in some capacity, just over 10 percent of us commercial industrial buildings. The point of all of this is to say is that we are really the only tool that has a proven long term

track record of helping folks that specifically focus on mercial slash industrial service.

SUSAN

28:02 If you come to us and say, hey, we do mostly residential. I'll make some recommendations for you and, you know, wish you the best same deal if you said we did mostly installs, frankly the same thing. If you said all we ever wanna do is reactive repairs. Again.

SUSAN

28:15 We're not the right tool for you. But this is all to say you've come to the right spot because, you know, that's basically what you've said you wanted to do. We feel like service. Well, we feel like you know, any good tool should either help you make money or save you money. We feel strongly service tray can do both and all this stuff we've kinda already touched on but just to, you know, put a fine point on it. We talked about efficiency. You know, what you're doing right now? You know, it sounds like that's eating up a lot of your technicians time.

SUSAN

28:47 We've kinda decided that it's not really gonna be workable. And we've got to find something that is going to streamline operations and not wasting time doing admin work. You know, we talked about, you know, making sure the technician experience is as optimized as possible. Because the other thing we didn't really touch on is if you're recruiting, then something we hear all the time is, you know, I actually interviewed a guy really liked and then he found out we were on pen and paper and he didn't take the job to the same way you don't you wouldn't want to take a new job with a set of rusty tools in your tool bag, same thing here.

SUSAN

29:25 And then in terms of making your money, we want to help you get more quotes out and get more quotes approved, that pull-through revenue, but just also quoting in general. And then the big piece of this is just making sure through all of the customer communication that you're sending that you're easily demonstrating value. It's easy for folks to understand what you did and access that information digitally so that anytime an issue pops up or someone asks for recommendation, you're the first name that comes to mind and that all kinda breaks down into all these five key buckets. These are all pretty self explanatory sales. Success is all about that additional pull-through revenue, getting more quotes out. But looking at this, where do you feel like your biggest priorities? Like which one or two pieces of this wheel is where your focus lies? And why?

MICHAEL

30:25 I'm gonna say technician productive productivity and management visibility? That's I thought too, okay.

SUSAN

30:35 Tell me a little bit more about management visibility. What are, what kinds of things are you hoping to be able to see?

MICHAEL

30:41 I'm thinking about that calendar that's what popped into my mind, what we use now versus being able to create events on the calendar and just click on it, assign it to somebody, seamlessly.

MICHAEL

30:54 Let's that tech know everybody knows what's going on. The tech would see information like immediately on what they're doing. I don't have to call them to tell them what it's about. It's all in there. Yeah.

SUSAN

31:12 And so, you know, that definitely touches on like scheduling and communication. Are there any sort of things like, you know, are you looking, would it be a nice to have to, you know, for example, be able to pull a report on all outstanding quotes, all outstanding invoices like that kind of thing as well?

MICHAEL

31:29 Yeah, that be good. I can't even imagine it right now.

SUSAN

31:34 Yeah, we gotta, get you out of, the paying zone and into, the optimistic features on well without further ado, let's actually jump into the tool itself. So like I said, we have the office view, the technician view, and then there's the customer view. So I'm gonna show you a few examples of that. But let me go ahead over here and we'll head over. So this is a location page in service trade, and something I heard the other day, I'm just gonna speak very frankly on this like in terms of how beautiful pages are laid out... we are a workhorse as opposed to a show horse. We specifically focus on functionality. So, you know, in terms of like look and feel it may not feel quite as nazzy as some of the screenshots I've seen from BuildOps, but it's my job to demonstrate how exactly this can lead to efficiency.

SUSAN

32:34 So let me show you how information is organized because this is your central hub for the office view or for you whether you're on a tablet or a laptop or whatever someone calls up. This is where you're gonna go to find that information. It's all in a centralized place.

--- Recurring maintenance ---

SUSAN

32:49 You can see from the jump how we're specifically organized for commercial because everything is done to an asset. Those assets there's a bunch of them. They all live at this location this night, Dale crispy cream, and those locations roll up to companies. So everything's going to be organized that way.

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

SUSAN

33:11 And you're always going to have the ability to easily communicate with anybody whether that's at the corporate level or at the onsite level. Michael, I sent you... a service link ahead of this appointment that we're going to be working today, but that will give you an idea of like what that looks like in terms of communication that you can send to the customer.

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

MICHAEL

33:33 Okay.

SUSAN

33:35 The name of the game with ServiceTrade is, you know, is, you know, frequently reminding your customers about the value that you're going to bring or the value that you brought. But in terms of other components of this that are top of mind, so you perform services on various assets.

--- Recurring maintenance ---

SUSAN

33:55 So these are all the ongoing active services that are happening here. So this can be whether it is a repair that we have planned or it's for recurring maintenance. They all live here. So you can easily see all of that and what's going on and when the next due date is going to be... all of your job histories right here, you can easily find when the last work was done, be able to go to that specific job, pull up that invoice.

--- Deficiencies ---

SUSAN

34:26 All right there. We talked about the assets whenever you hear deficiency. I want you to think quoting opportunity. This is every quoting opportunity that has been found in service trade, right there.

--- Paper process ---

SUSAN

34:40 Is that something that will be helpful, to keep track of that for sure. And then all of the quotes that have ever been sent are all right here. And then the other piece that you touched on was better communication back and forth. Like so, the text in the office aren't you know, playing phone call radio anymore, that leads into there's.

--- Assets ---

SUSAN

35:04 Always these comments and attachments both in the job and the location level. So, you know, this is just a silly joke one that I put in but you can put in things like gate codes, you know, advice whatever, and it's all accessible as well as any sort of, you know, video picture voice memo that's going to help them get the job done and they can, of course, reciprocate that through the app as well. Thoughts in this location page.

--- Recurring maintenance ---

MICHAEL

35:33 I, yeah, no, I like it too. I like it too.

SUSAN

35:37 Some, anything in particular?

MICHAEL

35:39 Yeah. Quick question. I understand like crispy cream. This is a location of Christy cream. So when you hit jobs, you're looking at history of service at that specific location, right?

SUSAN

35:52 Correct.

MICHAEL

35:53 And if you were to navigate to just crispy cream, you could then kinda do the same thing for all locations.

SUSAN

35:59 So we wanna keep it just because there's so many of our customers have, it would just be like a giant list that wouldn't really have a lot of value. So when you go

to this company page, it's strictly just gonna list the locations and then from there you.

--- Recurring maintenance ends ---

MICHAEL

36:13 Yeah, that's great. I like that perfect because we have a job right now that's taking us all over the state and I think we're getting by because we're communicating well, but it is absorbing a lot of time and we're trying to throw stuff in excel spreadsheets or whatever this would be. This would be pretty great.

SUSAN

36:36 Yeah. It is, my sole mission in life through this job, well through this job. Let me clarify that a little too crazy, but we want you office spreadsheets like spreadsheets or, you know, they're great for what they're great for, but not keeping up with this stuff because it's silos information and it introduces human error.

--- Recurring maintenance ---

MICHAEL

36:56 So...

SUSAN

36:57 But let's look at the actual job. We're going to work today. This is a work order and service trade. The offices view. We'll see, the technician view in just a second. So again, you can see we are going to perform these services on this asset, this rooftop unit at this night, Dale branch of, the corporate care.

--- Recurring maintenance ends ---

SUSAN

37:20 We talked about that. But this is where I really want to talk about how we're specifically designed to help manage planned work because anybody can handle react.

MICHAEL

37:29 Moving closer, see.

SUSAN

37:32 Nice.

MICHAEL

37:32 I...

SUSAN

37:34 Either you're getting closer or I've really rubbed you the wrong way.

MICHAEL

37:39 Correct.

SUSAN

37:40 Don't like it. But so here we can see this is what we're expected to do.

--- *Recurring maintenance* ---

SUSAN

37:47 This is a recurring quarterly plan, maintenance visit. So when we set this up, we, a, I want Susan to go out there quarterly. I want the flexibility to schedule it at any point during the month. And I want this to repeat, I want to create. So therefore there is a service opportunity floating out there after this October visit for January.

--- *Quote templates* ---

SUSAN

38:09 The other cool thing about this is we do not want anybody in certainly not easier because we don't want you to retype anything because a lot of your work is going to be in the office and out in the field. So this can be part of a service template. So if you're doing this type of work across your entire customer base, you can apply the service template. And that way you never have to retype this list and you never have to go and find the expected parts of labor. All right here... is that you feel like, that would save some time not having to re key for every job?

--- *Quote templates ends* ---

MICHAEL

38:46 Yeah, a lot. I'm just thinking about VPS right? Well, I mean, I'm thinking about all the other jobs. I mean, if we could have, I mean like see right there the filter size right there. That's one thing that eats up the current service manager. We go out on a job. It's like what filters I take. Let me look up the job. You know what I mean? It's if we could build this all in my, gosh. I keep coming back to efficiency if we can just be more efficient and...

SUSAN

39:12 Yeah, I mean, absolutely, because like a lot of time and I'm so glad that you guys have realized like what that efficiency really means. It's not just like, yeah, we like digitize stuff. It's thinking about like every single extra step folks are taking and how that's taking them away from more valuable activities. And of course, you know, you can tweak those if needed. All these other components we're gonna come back to as we work the job.

--- *Assets* ---

SUSAN

39:42 But this is the asset that we'll be working on and you're going to have full access both in the office and the technician view. I'll show it in the technician view of the service history, previous quoting opportunities manuals, diagrams, comments, all of that. We want flow of information, office to field. So it's...

MICHAEL

40:01 You can add like a manual in there like, okay.

SUSAN

40:07 Yes, I think I have for this one. Yeah, that would be under assets and I'll show you that in the mobile app. But yeah, everything else I'll kinda be talking through. But the other component is that for this work order, it's very flexible so you could have multiple services on multiple assets.

--- Assets ends ---

SUSAN

40:25 Frankly, we want you doing that so that we're not wasting trips back and forth. And then you can have multiple appointments on the same work order. But yeah, overall thoughts on this work order?

MICHAEL

40:39 Me too.

SUSAN

40:40 Nice. You guys want to see what this looks like from the text perspective?

--- Access to information ---

MICHAEL

40:44 Yeah.

SUSAN

40:46 Alright. Let me go ahead and share my screen and they can use any mobile device that runs android or iOS entirely up to you.

SUSAN

41:04 Screen.

SUSAN

41:11 There we go... and open up service trade. This is what service trade will look like. When they open it up for the day.

SUSAN

41:18 It's gonna have all of their appointments automatically in there. And if any appointment gets added to their schedule either after midnight or within eight hours, that will trigger an e-mail to them, letting them know. But otherwise most of our customers, their workflow is, you know, the night before first thing, the wake up, they check their app and see what is expected of them for that day.

--- *Access to information* ---

SUSAN

41:42 So this is that same job. But now it's in a mobile friendly format. So as a technician, I'm just gonna head over there... and we're gonna take a look at this and they can click on directions to open up their mobile version of, you know, whatever the preferred map TAM is, we can click on... any of these items here.

--- *Tech On-site* ---

SUSAN

42:04 I always recommend looking at the comments first. So if, you know, there's like, hey, you need to bring this type of gear, anything like that before they leave, checking that first. But then in terms of clocking at, they can go down here, swipe across and they can actually clock in as being in route. This is one of my favorite features because it's again, that customer touch point that I know that's important to you guys. So they can go over here and click notify customer and they can just even if they're arriving perfectly on time, they can still let them know, but otherwise they can adjust the arrival time based on what their GPS is saying and just send them a friendly, hey, fyi. I'm on the way you think your customers would see value in that sometimes?

MICHAEL

42:52 Some might it's not, but yeah, some might not realize that they would like it.

SUSAN

43:00 Yeah, very true. So from here, we can go ahead and pretend like this is a very short commute. We'll clock out of being in route and clock in as being on site. Again, this is gonna take a time and GPS stamp that will come back over with the office for review.

--- *Assets* ---

SUSAN

43:19 So now that we're here, it's time to figure out what are we going to be doing? We'll click on services and that's gonna have that same list of expectations of what could be done here. We'll go over to assets and that is the asset that we're expected to work on if there are multiples that would appear there. But as promised, I can click on that and see that full service history. So if any sort of questions about what was

done last time or what was done two weeks ago, it's all right here because they can click into that and see the same view for previous work.

--- Assets ends ---

MICHAEL

43:53 The...

SUSAN

43:53 Other night I say, do you think the, do you think the text would like that workflow?

MICHAEL

43:58 Yeah, yeah, that's cool.

SUSAN

44:01 The other cool thing is, so again with like, well, before I leave here, I can show previous quoting opportunities.

MICHAEL

44:08 Hold on one moment. Susan, I got you. Nice. Isn't that funny part bark service that's clever?

--- Assets ---

SUSAN

44:18 We wanted to be first in the phone book. So we've named our fate company or well, you can tell, our owner invented, that concept a while ago as when phone books were. But yeah. So this is where you could access that manual, any diagrams the text can add to that as well. And then any sort of comments about this particular asset would live there. But then the other cool thing is if a question pops up about other assets, they can see that same information about any other asset that's there.

MICHAEL

44:56 Now, can text add the assets through the mobile app?

--- Assets ends ---

MICHAEL

45:00 Okay, sir. Okay. Blind old man over here. I was like all the other. Yeah, I just noticed it a question.

SUSAN

45:10 That I do that all the time like, we roll out a new tool and I'm like how do we do blah excuse there's? A big button that addresses that. I'm like, okay, sorry... well, I guess the most common workflow for that is like someone calls up and they're like, hey, I need assistance with this rooftop unit and that's really all the customer knows. So usually the office can like kinda create a base asset and then they can edit it or if like while they're out here and they just have a conversation like, yeah, we might get you to service. So, and so sometime they can just go in there and add the asset right from there. And it's really easy.

MICHAEL

45:50 How can they add a job?

SUSAN

45:53 They can tell me about the like the current need for doing that.

MICHAEL

46:00 I mean, like we've got one of our guys, you just as a service tech, you just kinda make, I don't know, make schedules yourself.

--- *Access to information* ---

MICHAEL

46:09 Sometimes it's just easier. That way you get a phone call, hey, I'm heading to. So and so, you know, to work on their package unit and they just can they schedule the job on their end.

SUSAN

46:21 They absolutely can. They, they can go into... what basically what we call, our tablet mode of the app and they can go through the same workflow basically that you saw in the office and add all that in there.

--- *Customer engagement* ---

SUSAN

46:36 What what I will say is our happiest customers are the customers where that happens relatively infrequently because we, most of our customers are happiest when customer communication is really in terms of like scheduling stuff like that is really done by the office person. So that way the tech is spending more time doing valuable work as opposed to doing their own, you know, admin work through that.

--- *Access to information* ---

MICHAEL

47:05 Yeah, it wouldn't happen that often, but I just wanna make sure that was there.

SUSAN

47:11 Absolutely. Yeah, you can go into, the tablet view and do the same exact workflow that you do in the office. So you're covered there.

MICHAEL

47:19 Susan, I got a, I got a question. I think I know the answer but just to clarify like you're out there... and there's some other equipment that you were not there to service, but you recognize it probably needs to be serviced and you talk to someone on side and you're like, yeah, we, we'd love to get that done too.

--- Assets ---

MICHAEL

47:40 What the tech just go ahead and add the assets and then go to the, what was it called deficiencies or something like that? Pointing out like opportunities it was?

--- Assets ends ---

SUSAN

47:54 So, are you saying tell me if this workflow is correct? I'm a technician and they say, hey, we've also got this thing over here. You've never serviced it before and, but it's got this weird rattle on it. Can you take a?

MICHAEL

48:08 Right. And maybe the tech has time that day and maybe they don't, what are the scenarios there?

SUSAN

48:14 Is this something where this is going to require like quoting out like who's going to determine how much that repair is going to cost?

MICHAEL

48:27 Yeah. So, so basically, could the technician kinda get a quote started for the office people to start looking into? Is that how that would work?

SUSAN

48:35 That's exactly. That's the exact work for flow we're about to go through that's...

MICHAEL

48:39 Calling, yeah.

SUSAN

48:41 And that's what we would recommend again. Like we want like we want the text reporting, we want the office executing.

MICHAEL

48:50 Susan here's what my mind is, we have a kind of a separate gig going on with much lower skilled text. In fact, they're not text. They're just guys and they're doing filter change outs and we're asking them to record a lot of information about where they are, the location of the equipment, what condition is it in? Where they're taking pictures... and, in hopes to kind of maybe generate some business down the line. But also, well, anyways, you get the idea. And so I'm curious if they could be using this too. Rather right now, we're using the spreadsheet like we talked about earlier. They're taking, they have a camera and are taking like 200 picture pictures over a week and we take that SD card out of the camera, upload it to our computer and our a bunch of information on a spreadsheet, get that emailed off to whoever it's working it is.

SUSAN

49:50 Perfect. Okay.

MICHAEL

49:51 You know?

SUSAN

49:53 Yeah, it's working for now, but, you know, in time spreadsheet we talked about that?

MICHAEL

49:58 Somebody is in the office full time, trying to manage it and they could be doing other things.

SUSAN

50:05 Yeah, exactly. Yeah. So that would be, I think a pretty good use case for potentially depending on where that line is like a helper license where you can, are these people that are like generally going out by themselves and doing that?

MICHAEL

50:22 As in like not accompanied by a service tag, yes?

SUSAN

50:26 Correct. And about how many of those folks are there?

MICHAEL

50:29 There's two of them and then some random backups here and there, but there's two guys that kinda run the show.

SUSAN

50:36 Yeah. I think we, we'd wanna dig in and figure out exactly what level they would need to be at because I'm thinking that would probably be a potential good use case for helper licenses where they can just go in and like add pictures to jobs and kinda clock in clock out like that's kind of like the basic functionality.

--- Pricing ---

SUSAN

50:54 And then that could be reported back. But if you and I need to like double check on this, but in terms of them like kind of reporting that as a deficiency... that's something that would need that full license for, which actually would work out really well for you now starting off because our base package comes with five licenses anyway.

--- Deficiencies ---

SUSAN

51:15 So, you know, you'd be good to go there. But yeah, if they were going to report a deficiency, I believe they would need, to have that full licencer. But let's actually show what that would look like. So we've talked about all this stuff and let's say we do find an issue whether it's on the, a piece of equipment that we were assigned to work on or that one we just keyed in ourselves. What we'd wanna do is head over to deficiencies, it's gonna show us all the previous deficiencies.

MICHAEL

51:47 Wow.

SUSAN

51:48 It's all right here so they can refer to it. And this is really nice because like you're like, hey, like it looks like we've told you like four times that this thing's kind of broken, like are you trying to do anything bout it? You're gonna wait till it grows up... but we can go down here and click add efficiency and all the technician has to do to get this back to the office and convert it to a quote is key in the information on this page? So let's say we've got a broken compressor.

MICHAEL

52:14 That auto filled very fast. You've typed up plenty of time.

SUSAN

52:18 I'm it every day this poor crispy cream press, it's groundhogs day for these people. We find the sweet spot for getting these approved is like four to five different media items. So I'll go over here and click take photo. I'm not going to bore you with four to five of them but we'll pretend like my microphone is this broken compressor you saw in there that and you can add videos and voice memos for this. Voice memos are really nice because if it's something that's really kind of a lot to say, they don't have to spend time typing on their phone. They can just get that back. Of course, they can add descriptions to that. There's no compression with our images or videos, no limitations on file storage. And even if they're not having access to data, all that's

going to be stored locally. So you're not gonna have any loss. We'll go ahead and save that. And then it's gonna just ask us how bad is this? Let's say it's making this inoperable. And then we wanna keep this nice and organized which asset is experiencing this issue. In this case. We're gonna say it's this rooftop unit, and this is a new deficiency. If the tech want to, this is not required. They can put it in proposed solution. Let's say we want to replace it. So in just that short amount of time, we've done everything we need to do as the technician to get that reported back to the office. So that's gonna trigger an e-mail and that e-mail is going to take you to hold, please this page.

SUSAN

54:02 This deficiency page. So it's got everything on there that the technician just reported back. So we've got that picture, all the details they put in and all we have to do. So this is kind of what you would be doing. Jeremy all you have to do from here to get this turned into a quote, is we're going to go over here and click add to quote.

--- *Quote templates* ---

SUSAN

54:27 I always like to put expiration dates on things. It's gonna convert that efficiency into a quote. Now right now, it's a blank slate. If it's something really unusual that you're haven't done before not gonna do it again. You're just gonna want to key in the description of work parts, labor, et cetera. But let's say replacing a compressor, something we do pretty of often. So to that we're just going to just like that service template. We're going to go apply that quote template and gonna find my compressor replacement. Of course, this is something you would do. You don't want software engineers writing this stuff up... and it's gonna automatically apply this to the quote. So that way you can go in and make small tweaks to the description for this particular quote, small tweaks to the parts and labor. And it's all right. Here. Is this, do you feel like this would save you some time huge?

SUSAN

55:26 The other piece is everybody, most folks I talk to every customer is different. Some folks want grand totals only some folks see the value and just line item as with prices. So you've got 12 different ways to display, the quote and of course, you have defaults for that.

--- *ST app contracts and pricing* ---

SUSAN

55:42 The other nice piece is anytime you prepare a invoice or a quote, it's always going to show you internally only your gross margin. The other piece I wanna talk about here is our pricing contracts. These serve two functions. One, as you can see on here, it's automatically telling you this is how much you need to mark up these items. There's all these different rules about that. The other component of these pricing agreements, is a great way to track the success of your plan, maintenance agreements. So I can go just really quickly as a quick sideline... into that pricing agreement. Let me just quickly show you that.

SUSAN

56:34 And you can create these for each of your customers. And it's gonna show you, of course, you know, got the ability to set specific markup rules, but also gonna show you how profitable that service agreement is today. And your actual merchant... would that be helpful to know?

MICHAEL

56:54 I would... I think I saw when I was watching this guy Graham go through it, he's the guy in Kentucky that his homepage was just averages for his department.

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

MICHAEL

57:11 I think too, you don't have to navigate to go to that. But am I correct? Is that how I remember?

SUSAN

57:17 So, with like what it looks like when he logs in for the day or a specific report?

MICHAEL

57:21 It showed some metrics just for like how, the service department was doing for the month I think or something like that?

SUSAN

57:29 Do you, do you know which plan he was on? Does he?

MICHAEL

57:32 They had all kinds of modules? I know that.

SUSAN

57:35 Gotcha. No. Again, this is going back to, the very beginning is we have as you grow, we have a plan that enables a tool called quick site and that we can use to create the most beautiful graphs you've ever seen and give you all this stuff, all this stuff real time. Like if that data is in ServiceTrade, we can make you a beautiful graph for it. Again, that comes, you know, that customization with any tool us build out. Soever, is going to come at additional costs. My recommendation is to use service trade for about a year. And when that data is in there already, and then once you've use ServiceTrade to make you more money, grow that service department, then consider moving into a plan that enables that there's really granular reports.

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

MICHAEL

58:22 Makes sense to me.

SUSAN

58:27 But yeah. So going back to the quote, we've looked at, this is looking fantastic. We've got our broken compressor image right here. So let's go ahead and get this over to the customer. So we'll go ahead and click over here. Again. You've got all your customer options, to take a look at this, and then we can even go down here and select require a po for approval. So if you've got some folks that need that extra layer of accountability, they cannot approve it until they key that in and we'll go ahead and send that over to the customer... and let's see what that looks like. This is a quote and service trade, your brand front and center... description of what you're expected to do the parts and labor laid out the way that you want.

--- Quote templates ---

SUSAN

59:18 All right here.

MICHAEL

59:20 Yeah, that's fast.

SUSAN

59:23 It took me about, I mean, obviously like, you know, if you need to the level of customization affects the timing, but, you know, it's a kind of a five minute process for non custom stuff.

--- Quote templates ends ---

SUSAN

59:36 What do you think your customers would think about seeing something like this? The pictures and everything laid out this way?

MICHAEL

59:44 It'd be nice. It's very tough and dry right now.

SUSAN

59:52 And how are they approving? Are they like calling emailing?

MICHAEL

59:56 Think this e-mail and back sign an e-mail back. Yeah, yeah, that's probably correct.

--- Quoting ---

SUSAN

1:00:02 With this, you've got your big green approve button, but then back here, you can always see if the... on the history, if they've opened the quote, if they have, you

know, actually seen it. So if someone's like I didn't get it, did you, because I can see that you opened it?

MICHAEL

1:00:23 So say, you made 12 quotes for the week again, does, do you have like a dashboard that you can kinda go back up on? Okay, you're fixing to do it, right? Yeah.

SUSAN

1:00:37 That macro quote management and all the same is gonna apply to invoices. So just keep that in your head. But, yeah. So what most of our customers do is, well, first of all, the plan that I would probably recommend potentially starting with our premium option, that middle tier is going to come with automated quote reminders. But if you just want to quickly see all quotes that are for example, past due or is about to expire, you just put that parameter in there and then you can search for it. And then from there, you can mass communicate with those folks, okay?

--- Paper process ---

MICHAEL

1:01:16 Awesome.

SUSAN

1:01:18 Same thing with invoicing.

SUSAN

1:01:23 You feel like that might help keep some quotes or invoices from falling through the cracks?

MICHAEL

1:01:28 Yes, we've got several that have fallen through the cracks.

SUSAN

1:01:31 Yeah. So now we're kinda in a little bit of like what data, what macro data is available in service trade.

--- Tech time tracking ---

SUSAN

1:01:42 So I do also want to show in terms of the tech scorecard, this is really nice especially as you grow the volume of your technicians, you can easily see how much time everybody is spending on a job... for a certain period of time. And each category. And then you can also see how many appointments on site late miss, and then the total revenue each technician is brought in.

SUSAN

1:02:10 So all of that would be right there as well. But yeah. Any other questions about like being able to access information like that? Any other pieces that we're missing?

MICHAEL

1:02:24 The calendar?

SUSAN

1:02:26 Yes, but we'll always like to do scheduling last?

MICHAEL

1:02:29 Okay. So.

SUSAN

1:02:31 Okay, perfect. So the thing is we've left or we've got the quote out and from there, we can easily, and once it's approved, this is the other cool thing.

--- Recurring maintenance ---

SUSAN

1:02:42 Once it's approved, we can now take this quote and just turn it into a job. So all you've got to do... is put a due date on it... and then you just schedule it out and that's it, you can schedule it on this individual page or you can use the scheduling options that you're gonna see in a second. But all that information about what's expected... and the items they're all right here. So no double data entry.

--- Tech On-site ---

MICHAEL

1:03:11 Yeah. The quote then populated a lot of the job.

SUSAN

1:03:13 Yeah, all the job scheduling.

MICHAEL

1:03:17 So...

SUSAN

1:03:23 So we've got that in there, but we've left our technician out there. So all they did was report efficiency, but they got a clock out.

MICHAEL

1:03:41 You just stepped out for a minute?

SUSAN

1:03:42 You're fine. This next part definitely, it's kind a good time because they'll definitely pertain to you in particular. So... head back into service trade. We report of the deficiency. The other thing I wanted to touch on is keeping up with parts. How are you guys currently doing that?

MICHAEL

1:04:08 Pin and paper.

SUSAN

1:04:10 Gotcha. So we service trade, you know, you saw how it was easy to add those in there, but also the text and add things. But the nice thing is that you can just go in and, you know, you've got your existing list in the back end.

--- Parts management (inventory) ---

SUSAN

1:04:26 So they don't have to rekey any common items, but it's all right here. So they don't have to do anything. But this is the one thing we do ask when they do add items is indicate the source. If they got it from truck stock, they put technician. If they got it from a part vendor, they would, you know, of course, put in which part vendor, but they could also put in. Did you order it? Did you receive it or do you need someone else to order it? All those, all those categories are going to be macro reportable in the back end. So once a week, you can run a report on truck stock that was used and then replenish that.

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

SUSAN

1:05:03 So nobody is driving around same thing with, you know, keeping up with, hey, what needs to be ordered, all of that. And I can show you back on our job screen, how you can specifically run a weekly report on jobs waiting for parts or jobs that have parts that need to be ordered. That, that would be helpful. Yeah... the only thing you missed was how we can indicate on parts, how there's a list on the back end. And then you can put in statuses for things that you get from... existing, you know, like going to the vendors and then run reports on that. So you can keep up with all that. And you don't miss rescheduling jobs that are waiting on parts.

--- Deficiencies ---

SUSAN

1:05:50 So we've done the work. We've reported the deficiency. We talked a little bit about the need to want or wanting to be easily communicating back and forth the office. So let's say we want to put in a specific comment about this job that we want the office to know before invoicing out for it.

--- *Assets* ---

SUSAN

1:06:06 Or just in general, all we did was head over to comments, click add a comment. They can key in whatever they like. So that would be right there.

MICHAEL

1:06:17 Distinction between job and service is.

SUSAN

1:06:21 So the job that's going to be specific to this job whereas the service is going to repeat with the recurring service.

--- *Forms* ---

MICHAEL

1:06:30 Gotcha.

SUSAN

1:06:35 We talked about that. Is there any sort of need for like specific... like do sometimes like people like your customers give you like a PDF, like we need you to fill out this PDF like on paper while you're out there.

MICHAEL

1:06:50 Not at all. No.

SUSAN

1:06:53 We'll just know that that's easily done through service trade.

--- *Tech On-site* ---

SUSAN

1:06:56 If that becomes an issue, we can certainly talk about that and it can be automated. And do you need onsite signatures for work authors for like work completions?

MICHAEL

1:07:06 Yes.

SUSAN

1:07:09 That's super simple as well. So, you would just go down here, create work acknowledgments, and you're you know, standing next to the person that would be signing, you can review the tech and review all of that with them.

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

SUSAN

1:07:21 You can save some time by just going in and selecting the comment. I mean, selecting the contact that would be actually signing off, review all of these items with them. They're gonna toggle on TS and CS. I got to ask anything in particular exciting about this.

MICHAEL

1:07:46 No, nothing in particular. It's just, it's just nice.

SUSAN

1:07:50 God. Okay. So.

MICHAEL

1:07:54 Looks very official. I guess if I was the customer, I would be happy with who I was working with because of something like this.

SUSAN

1:08:03 Good. That's what we're designed for is we want you to look as professional as your work actually is.

MICHAEL

1:08:10 I...

SUSAN

1:08:12 So we'll click next and they just do those... and they get an e-mail and it gets attached back with the work order.

--- Tech On-site ---

SUSAN

1:08:24 So we've kinda done everything. We think we've done everything we need to do. I'm kind of alluding to something that will happen soon. But before we clock out any other questions, or any other needs for the mobile app that I haven't addressed?

--- Forms ---

MICHAEL

1:08:45 Yeah, thank you. Maybe right now.

SUSAN

1:08:48 Overall, how do you think your text would react?

MICHAEL

1:08:52 I think they would like it. I think we're a lot off their plate. Yeah. What they have to deal with right now. It's like basically, they have one form. You got all these different buttons and it's in a job, you go in and out of the job as you need to, they have a form and they need to have everything filled out and hit submit and they cannot leave that form.

--- Forms ends ---

MICHAEL

1:09:15 And if you do it, typically don't go through correctly, like you need to get in it and fill it out and send it back to the office. All kinds of together. It's definitely not something that's conveniently there as you're doing what you need to do to add information or review something.

--- Tech On-site ---

SUSAN

1:09:31 Yeah... yeah. That's it's on to be centralized exactly. So from here, we're gonna go ahead. We've done everything we need to do. So we're gonna clock out. Yes, I'm done with this appointment. There. There's a possibility to say you're on a break if you need to utilize that... going to launch it, just one o'clock after that, no biggie but we got everything done and this is another place. So if you had multiple services and multiple assets, you'd have to check each one. So there's a little extra layer of accountability for the text. Well, go ahead, click here and then click, continue clocking out... and we'll go in here.

--- Deficiencies ---

SUSAN

1:10:12 And did we do all of these things? Did this is going to basically say, did you attach a photo? Did you leave a comment? Did you find a recorded efficiency? And if, you can set up in the back end to require none, all some of these things. And so from here, we can go ahead and finish clocking out.

--- Access to information ---

SUSAN

1:10:41 At first I was like, wait, they waving me down or is there so?

MICHAEL

1:10:45 We have a lurker back there. Is the window?

SUSAN

1:10:50 So we've done everything on the mobile app. Let's now, let's go get paid for this job back in the office view everyone's favorite part. So you'll see that this went from scheduled to completed.

--- Tech On-site ---

SUSAN

1:11:06 We've got our clock events that we can review. And this is nice because we can see how much time do they actually spend on site versus what's actually in... you know, what we are charging for labor. We can see that attachments there that work acknowledgment. We can review their comments and let's say, hey, this is something we do want... the in customer to see, maybe we edit it a little bit. We can just update that... and we are all set. We've reviewed it. We're like, you know, I'm ready to invoice this out. So from here, we're gonna go ahead and click complete job and create invoice. And it's gonna create the invoice from the items that were on there.

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

SUSAN

1:11:54 Of course, if your tech had added any other items, you would review all of that before creating it again. You've got the visibility of that gross margin. Can see that comment on here in a Ray to go ahead and get this after review to the end customer. So click send invoice link and let me show you what that invoice looks like.

--- Invoicing ---

SUSAN

1:12:16 Now our invoices they're pretty standard, you know, as they should be. You don't want a lot of complexity on an invoice. But here's where our invoices are different from a lot of other options. Is this go to service details button? This is that same service link that you saw before.

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

SUSAN

1:12:34 But now with all this additional information in it, so you can see all the appointment time, what we did, the parts and labor, and you can toggle all this stuff off if you don't want it, the comments, the pictures, the deficiency reporting see, we went the extra mile and found that and that's all right there. You feel like the end customers would appreciate having access to this information.

--- Customer engagement ---

MICHAEL

1:12:59 Yeah, I see some of them definitely.

SUSAN

1:13:04 And when we get into, you know, the customer, excuse me, the customer experience as well also want to emphasize that we do have... our, the plan that was mentioning before the ability to have a customer portal. So you can attach a link onto your website... and all they do is key in a user name and a password, and then they can see the full service history quotes invoices, and they can even go in and to a specific asset and location and request service on that.

--- *Assets* ---

SUSAN

1:13:44 Is that, is that something you feel like down the road your customers might wanna utilize?

--- *Assets ends* ---

MICHAEL

1:13:50 I was thinking some of the bigger ones it team, or something like may.

SUSAN

1:13:56 Yeah, I've just found I'm the outlier as a millennial that doesn't mind talking on the phone, but everyone I talked to, they're like, yeah, few of your people wanna call and ask for things. They just wanted to see things online. So... only a portion of that, but... that would be... your service portal right there. And then from here, we can just head back... to that particular invoice get paid for it.

SUSAN

1:14:34 Let's head over to scheduling. So as I mentioned before, we're designed to, you know, anybody can kind of like do your basic scheduler but we're designed to make sure that you're scheduling out and not missing any sort of planned maintenance visits.

--- *Recurring maintenance* ---

SUSAN

1:14:51 So the place we want to start for that is that service opportunities page. So basically what you'd wanna do at some point before the next month is go over here and then pull up all the upcoming opportunities. So this is all of that recurring work that's coming up do in November.

--- *Dispatch* ---

SUSAN

1:15:15 And so we can review all of that... and say these are all planned maintenance jobs... and then convert these into jobs. This is really nice because you can see like in this Arthur ash stadium, normally, this would just be like four random jobs with all these random due dates. But here we can consolidate them into a single visit by utilizing this tool. Same thing with all of this here. I'm not going to convert them because I'll mess up everyone else's demo account. But once we convert them into actual jobs that need to be worked, they're gonna appear on our map base scheduler.

SUSAN

1:16:01 So this will be much more simplified because this is a demo account with everybody's stuff in it. But let's take a look at what's coming up due next month. Again, ignore all of this. You will not be needing toilet exhaust cleaning. I'm gonna guess.

SUSAN

1:16:20 So we can Zoom out here and these are all the jobs that need to be, they're either on the schedule or need to be scheduled. So basically what our customers do is they go through and they have it just selected on unassigned and unscheduled... and they basically just go piece by piece and say, okay, for example, I want to go ahead and... get this job in Norfolk done and that needs to be done by the sixteenth of member. So I'll drag that onto the schedule for Adam. You can see that it's now changed to Adam's color. This all your text would have various color assignments and then you can just throw it on the schedule from there. And then you can make that schedule a lot bigger. We, we are in the process of revamping this page to make it even more streamlined. I'll even come with a month view as opposed to a week view. We do find that most folks like when you get into the month view and you got a lot of jobs that are on there... I can get a little bit crowded. So some folks need a bigger screen for that, but all of that would be right there. And of course you can make adjustments, drag things around et cetera. But would this help with scheduling the planned work?

MICHAEL

1:17:46 Think so. That seems pretty easy.

SUSAN

1:17:48 Good, good. And of course, after you've done all that work, you can still utilize this tool for jobs that are actually on the schedule. So changing that to jobs scheduled for this month... you can just check in with that daily and see what things are looking like. So you can make sure it's making sense geographically still. And then, of course, you know, we would be headed back and... the actual week we're working with and see it in that week view whenever you need to schedule reactive work. I won't spend too much time on that because pretty much everyone has a excuse me, a very similar tool for this. We would just head over to our dispatch board... and you can see everyone schedule, add a job, move stuff around et cetera. But this is for your day by day. My gosh we need somebody there today, tomorrow, the next kind of thing.

MICHAEL

1:18:48 Yeah. I watched a guy live who dealt with that exact issue. They had an emergency come up and they used this tool pretty seamlessly to figure out, who could do it. I like it.

SUSAN

1:19:05 Yeah. And then you can, anything that hasn't already been completed like this thing, just move stuff around, move it to a different tech, shorten the appointment, whatever... you can see, clock out clock in events.

--- *Tech time tracking* ---

SUSAN

1:19:21 And then I always like to end at the beginning. So this is what it looks like. When you log in for the day. It's got this is preset. So you've got your daily schedule on their location based on recent clock events... any overdue.

--- *Dispatch* ---

SUSAN

1:19:38 This is just an extra catch off. So for whatever reason, we still miss something that is overdue that doesn't have an appointment that you want to check on that immediately. Same thing jobs with that appointment do in the next couple of weeks. And then this is really where Jeremy, you're probably going to live in terms of the office view is going through and reviewing past jobs that have not been marked complete by the office, figuring out.

--- *Tech On-site* ---

SUSAN

1:20:00 Do they need to be invoiced out to? They need to be rescheduled because we're waiting on parts, what's the deal, just working through all of that until that's fully completed. And then places where we've marked the job complete. We want mark. The, the tech is mark complete, the office mark complete.

--- *Tech On-site ends* ---

SUSAN

1:20:15 But now we need to invoice it out from the office view. So that would be that main screen. What else? Have I not addressed that's? A nice or gotta have for you?

MICHAEL

1:20:29 No, not nothing you have.

SUSAN

1:20:36 Now, in terms of next steps, this would be my recommendation and I want to get your thoughts on it.

--- *Purchase decision* ---

SUSAN

1:20:44 Of course, we're gonna talk about pricing, but my recommendation would be just while things are kinda fresh in folks mind, I would love to be able to because it sounds like we're all in agreement that this is meeting needs. I would love the ability to potentially get something on the schedule that we could then move around as needed within the next couple of weeks just in terms of timing, for Jimmy as well as the owner, to come and address questions and kinda check some things out. Is that something that you feel like you would be open to?

--- Quote templates ---

MICHAEL

1:21:26 Yes.

SUSAN

1:21:28 Good. Well, in light of that, let's discuss pricing. So let's head over here and I will pull up my pricing. But first, I want to show you all of the plans. So this is where I'm recommending you start with. However you could certainly start on select. With this would be my recommendation.

--- Quote templates ends ---

SUSAN

1:21:52 This is why premium is gonna enable you to have different pricing agreements for different customers to keep up with plan maintenance. It's gonna come with 24 seven support. It's going to enable you to have that Sage integration whenever you're ready for it. And then it's gonna come with that service portal. Would you agree?

--- Type of work ---

MICHAEL

1:22:13 And the service portal is?

SUSAN

1:22:16 Add onto your website where folks can request service and review previous service.

MICHAEL

1:22:21 Okay.

MICHAEL

1:22:28 Yeah, absolutely.

MICHAEL

1:22:35 You alluded the project management being allowing us, to work towards semi integrating with other softwares.

SUSAN

1:22:44 So, project management would actually be if you did more like install projects that take up like multiple appointments and you need to track it with a budget.

--- Type of work ends ---

MICHAEL

1:22:52 Now, support for custom integrations, gotcha.

SUSAN

1:22:58 Precise. But, are we thinking potentially premium would be the better place to start or more select?

MICHAEL

1:23:09 I'm leading select and I will allow you to talk me out of it.

SUSAN

1:23:13 No, honestly, I'm not going to.

MICHAEL

1:23:16 Cause I don't think the sales, the service portal or the custom integration is something we need to do soon like within a year or two for sure. But I don't see us tackling it immediately. The question I've got is who builds the initial? Yeah, you know what I mean? Who, who enters in all the addresses? And I mean, is this something you guys kinda start with? And we add to it? Or is it a blank slate?

--- Implementation and ongoing support ---

SUSAN

1:23:48 Yeah, we definitely need to address onboarding. So with that's something we take a lot of pride in. We, depending on the plan 60 to 90 days with a dedicated project manager, they're going to be working with you to pull your data. Your customer data probably is going to be most accurate in Sage, getting that clean, you know, exported and then import into service trade. We are going to hold your hand through that whole process because we adimitely refuse to let you go live with service trade with bad data.

MICHAEL

1:24:20 And that's allowed in the 89 dollars in the selection.

SUSAN

1:24:24 Absolutely. Every single plan. We wouldn't consider doing business any other way. Also, we block 60 60 days for select and we only have specific onboarding windows because we want to make sure that we have enough resources.

MICHAEL

1:24:42 So, is it based five tax, or does it scale up to that number?

SUSAN

1:24:48 Everything can be done on five tech. The one, the reason I was thinking about premium, the one thing that doesn't come with select is support for the multiple pricing agreements.

MICHAEL

1:25:01 That's a big one.

SUSAN

1:25:07 So, something to think about, you don't have to decide that today, obviously.

--- Implementation and ongoing support ---

SUSAN

1:25:15 But yeah, in terms of support, all that's gonna come with it. And, you know, 60 days later, as long as you continue to, you know, kinda follow the plan. We're going to get you live in 60 days. And we actually, I'll send you... a document that shows out specifically what that plan is, how much time each person's gonna take? Because any place that tells you like don't worry about it and doesn't really have that specific plan. I'm always weary of because it's like, how are we gonna get on boarded successfully? So, yeah, so.

MICHAEL

1:25:47 We kinda touched on earlier. Like what do you call like a helper account or something like that? Adding two, two or three people?

--- Pricing ---

SUSAN

1:25:56 Yeah. Let me.

MICHAEL

1:25:57 Ahead just out of curiosity.

SUSAN

1:26:00 No, no, that is a very good question. And I always like to pull up specifically what helpers can do because I want to be very clear. So helper license is going to be 59 dollars. It's going to let them... they can create edit or delete attachments.

SUSAN

1:26:23 So like pictures, videos, et cetera, and they can clock in and clock out and view everything else. What they cannot do is report a deficiency. So, it would be my recommendation to... start off with that five text because you have a do that anyway.

--- Pricing ---

MICHAEL

1:26:42 And...

SUSAN

1:26:43 Then as you're like we've got these other helpers that are doing some stuff like I would say like let them like add a helper license. And if you're frustrated by them reporting deficiencies strictly through adding... pictures, as opposed to go into the deficiency process, then you would consider whether or not they need a full license.

MICHAEL

1:27:03 Is the up turn cost the same depending on the plan?

SUSAN

1:27:09 So, in terms of pricing... everything is due annually upfront. And the reason we do that is because we wanna make a commitment to you and we want you to make a commitment to us because frankly like onboarding software, it's kinda like saying like.

--- Pricing ends ---

MICHAEL

1:27:26 So I understand.

SUSAN

1:27:30 Yeah, you know, the deal, like.

MICHAEL

1:27:31 Yes, there's...

SUSAN

1:27:32 They're gonna, there's going to be days where like this sucks. I don't want to do this today. So we want to kind of help folks kinda like push through and, you know, get to that... happy ending on the other side of that. So in terms of pricing, let me pull up my pricing calculator. So.

SUSAN

1:27:59 There we go.

SUSAN

1:28:07 So the way that I got to these numbers five times 89 times 1,253 40 onboarding is 1,750 taking, year one to 7,090. Of course, that onboarding goes away after year one and we have a rule in place that we can never increase our prices year over year by more than I think it's like five or seven percent.

MICHAEL

1:28:32 And I think I was doing the map in my head assuming that the one time initial, is consistent regardless of plan. Is that what you were saying?

SUSAN

1:28:43 And I, let me clarify so in terms of premium, because the additional premium features take a little bit more to onboard that onboarding, is higher. So in terms of let me make sure this is correct, change that. So if we went with premium, it would be 83 40, then 3,500. Okay for onboarding, and then 18 840. I guess for me is I would just have that internal discussion of like how important is it from the very beginning to be able to set up those multiple pricing contracts? If that's if that's the thing you really want to have, I would say let's start you off on premium. If that's something you're like let's try it without it. Maybe we don't need that data. I would say start on select.

MICHAEL

1:29:30 Gotcha.

SUSAN

1:29:35 Yeah. Is that, is that somewhat in the ballpark of what you've been seeing out there?

--- Parts management (inventory) ---

MICHAEL

1:29:40 I don't even know what the ballpark is, but, I think this makes sense. And I'm thinking about is there, in one of the plans or just in general... something related to like our inventory of parts, is that within the system somewhere?

SUSAN

1:30:09 Yeah. So... you're going to be able to track all of that and then... we had over here to jobs and then job items. So this is going to let you run reports on everything that your techs use, where they got it from. This is going to be your main records. So, you can also go in and bulk upload a list of parts or update them one by one. And

then the other place you can go as I alluded to is you can run reports on jobs with parts that are overdue parts, partially received, so on and so forth.

MICHAEL

1:30:56 Do any of your clients use this as a interface to just to sell parts? Like, if they went through like we have a part shop in our warehouse, right? And customers can show up to just buy stuff. We have to do a bunch of stuff on within our accounting system obviously. But what else happens is our parts guy essentially using your terminology creates a job just to notify accounting, to process the invoice and then also to pull it out of inventory.

--- Parts management (inventory) ends ---

SUSAN

1:31:31 So we don't we never want to call ourselves a point of sales system. But if you need to create a job where all you're doing is buying a part, you can certainly just do that. But if it's more of like I had a guy one time, I don't know how we got on our calendar, but he did plan maintenance work for large scale equeriums and also had an aquerium shop. So like people would just like walk up and buy like aquarium parts. And like that wouldn't be necessarily the best fit, but like for existing customers that are already in the, so that's really where like for me, where, the differentiator lies is if they're an existing customer, then sure. But if otherwise, you're going to have to create a location, a customer and a job and put in the parts in order to invoice.

MICHAEL

1:32:22 Okay. Yeah. I'm thinking with how we're set up. This will all make sense. What I'm doing is we're gonna cut ideally, you don't have, I don't pay for you. You have... a, you would keep one, but Brian, and Brian wouldn't need it anyway. Okay. My question. Yeah.

--- Access to information ---

SUSAN

1:32:47 And to clarify office users are completely free, you can have two people in the office or 12 doesn't matter. It's just tech in the field.

MICHAEL

1:32:58 Okay. Cool.

SUSAN

1:33:01 I have to ask, how did we wind up comparing to what you saw with build ups?

MICHAEL

1:33:08 What was, what was your opening statement?

--- Purchase decision ---

MICHAEL

1:33:11 Is exactly where I was going back to your work horse and not a show horse? Yes, I completely agree. But it's very.

SUSAN

1:33:20 What kind, what kind of horse do you prefer?

MICHAEL

1:33:23 I would rather have a workforce, yeah, for what we'd be for sure.

SUSAN

1:33:29 Good, good. I'm going to say this and I say this and I want you to know that there, there are competitors that frankly recommend depending, if you did more residential, if you did, you know, more installs, lots of great tools here's.

--- *Purchase decision ends* ---

SUSAN

1:33:47 My concern with BuildOps. They came into existence less than three years ago. A bunch of engineers. I believe it was from tighten decided they were going to create their own tool and it's slick. It's nazi here's, my concern with BuildOps. They, you know, the aquerium guy, I mentioned they would sell BuildOps to the aquarium guy like whatever you ask, they'll say it's in the it's in the road map. It's coming down. I can.

MICHAEL

1:34:18 I road map that's funny. You mentioned what you mentioned like the words road map came out of his mouth.

SUSAN

1:34:27 If I ever say the word roadmap to you without, if I say like this is absolutely coming by this date, I am lying to you because something could happen. And I'm not gonna, I'm not gonna guarantee. Are we working on really cool stuff? Absolutely. We're absolutely like working on cooler like more streamlined, more efficient scheduling. We're absolutely working on tasking like instead of just a list of things you can like check off boxes and key in values like we are working on that, am I going to promise you a delivery date for that? Absolutely? Not. So that that's my concern. My other big picture concern is... this is a tool that's going to fundamentally change the way you do business. And I know that, you know, that however it to that end, that means it needs to be the right tool for the job and they do not have any sort of proven track record with industrial commercial service. The other concern that I have with them is that people come to, I sold a deal to a gentleman in New York and this is not the first time I've heard it. But he expressed it very descriptively that their onboarding process is incredibly disorganized because they just received a huge injection of venture capital funding and their leadership is telling them sign up whoever you can at whatever price.

--- Type of work ---

SUSAN

1:35:59 Frankly, if you go back to them and tell them that you checked out service trade, I guarantee you they will slash their prices by 50 percent. And to me, that would scare me.

MICHAEL

1:36:09 Yeah, that explains the gorilla marketing too. Yeah, it all lines up.

SUSAN

1:36:17 And I'll put it like we have like I would just say, if they're going to be a significant consideration, I would demand that you get proof of at least two companies who have been with them for over a year that do mostly commercial service and have been successful with growing plan maintenance with that tool.

--- Purchase decision ---

SUSAN

1:36:41 But in about that... and in terms of next steps, my recommendation light of everything we talked about is I'm in terms of my action, I'm gonna put together I'm gonna send you this recording. I'm going to... you know, send you information like a high level overview on onboarding, some case studies, all that kind of stuff. Let me ask you this, what does your data care about? What's he gonna wanna see?

--- Purchase decision ends ---

MICHAEL

1:37:17 He, you know, he was the first, not that Jeremy wasn't on board, but dad was what pushed it. He's been wanting to see some type of software put in place. I think because a lot of our peers already used this, he'll be, he'll feel comfortable... knowing that they have success like they're all very successful service departments that operate just like us. They're the same company in a different market and that's encouraging that they all use. I just pose the question to everybody in the room and the ones that use you all kinda in unison like, yeah, we use ServiceTrade. It's great. I didn't even care to go into the details. They're just telling me it's good. You'll like, it was cool.

SUSAN

1:38:04 And that's what, you want. You know, it's one of the things like I just wanted to work well, the job done. Absolutely. Are there any specific things like it's like we gotta find a way to get more quotes at or get the text to do blah blah blah. Anything specific feedback that he's given you in terms of make sure that it does xy? Z?

MICHAEL

1:38:23 No, I think that's up to Jeremy really. I mean, if Jeremy is happy with it. And then from speaking, from his perspective, I think that's a, say everything I've seen. I

just, I've seen some things that we dropped the ball on and slipped through the cracks. And it looks like this software is not going to allow that to happen anymore. So that's I like that part of it.

SUSAN

1:38:50 Good. If a bold question, if you will allow it if it were completely up to you today based on the options that you've seen there at there, would service trade be the option of choice for you? Jeremy?

MICHAEL

1:39:05 I say yes.

SUSAN

1:39:09 Sweet. So, I guess all we gotta do is get a I'm sorry, what's your father's name? So I don't keep calling him the owner slash, dad.

--- Purchase decision ---

MICHAEL

1:39:16 Scott SEOT Scott?

SUSAN

1:39:21 Very good. So here's my recommendation in terms of moving forward. I'm assuming he needs to, does he need to meet with me to have like a quick question and answer kind of thing or?

MICHAEL

1:39:33 Think we're about to walk out and go to lunch with him immediately after this meeting. I'm judging by peering into this room.

--- Purchase decision ends ---

SUSAN

1:39:40 Can you wrap it up with this lady? Shut up. It's on the screen?

MICHAEL

1:39:45 Shoot an e-mail to me and we will probably respond today with when we can meet and if it works for your schedule.

SUSAN

1:39:55 Well, so here's, the little bit of a challenge is that not to brag, but I'm going to Iceland next week.

MICHAEL

1:40:01 I am.

SUSAN

1:40:02 So excited.

MICHAEL

1:40:04 So...

SUSAN

1:40:04 I'm hoping just because when we go out past like an extra week like just people, it's hard to remember stuff. So, is there any way we could find like 30 minutes on his calendar to get together like maybe tomorrow or Friday?

MICHAEL

1:40:20 Not Friday. I'd say it's actually more you and Jimmy that'll make it work. I think tomorrow Jim, yeah, here. So, but it would definitely have to be after lunch tomorrow from one o'clock on. I bet I could get Jimmy to, yeah, yeah, for 30 minutes. Yeah, I'm sure that to.

SUSAN

1:40:51 Yeah, because basically the, so I'm open tomorrow afternoon. So I'll send you all this information might ask is discuss this over lunch, review the information I'm gonna send over. It's you know, rest of the day through tomorrow morning. And if you'll promise to basically like go over that and, you know, get folks to either everybody that needs to sign off on this, either bring their questions or physically bring them to the meeting tomorrow, then we can go ahead and potentially move this right along because the other piece of this is the onboarding windows like tell me in a perfect world, when would you wanna go live with?

--- Implementation and ongoing support ---

MICHAEL

1:41:31 I feel like... after the first year because it's a little slower, right? I mean, I'll give us time to really flush it out, but I wouldn't want to do it before the first of the year just because there's gonna be an on everybody scheduled off.

SUSAN

1:41:49 And, and frankly, you're not able to anymore with the timing of this because our next onboarding date starts, and they're kinda limited starts on, they're on the fifteenth and the first. So the first would be our next one. If we snag that 60 days of onboarding. It would kinda be perfect timing because your go live date would be the first of the year... what time tomorrow though?

MICHAEL

1:42:20 What do you have after like one 30?

SUSAN

1:42:24 I'm wide up and you add to?

--- Implementation and ongoing support ends ---

MICHAEL

1:42:28 Sure. Two o'clock...

SUSAN

1:42:31 Two o'clock and just for convenience, let me get everybody's e-mail like.

MICHAEL

1:42:36 Type it in for you.

SUSAN

1:42:39 Nice say if you want to type in because this need Scott Jimmy's and of course, yours, Jeremy... that is so smart because I've been like worried about making transcription errors this whole time and you can just type it in the chat. So, thank you for improving my process just now.

MICHAEL

1:43:03 Yeah, same ad every time, there's your first letters, sorry, being lazy. Now, you're just have to type.

SUSAN

1:43:11 No, that.

MICHAEL

1:43:12 Was I thought it was being smart?

SUSAN

1:43:15 No, that's what I'm saying. It's like, you help me because otherwise, I'd be, like, what? And then they're like it bounces back and chaos and I hate it. Sweet. I'm like I said, I'm gonna gather all that. You're gonna have a fantastic lunch and talk about service trade, and then we're going to get back together and hopefully address any final questions and potentially getting an agreement out of everyone's in agreement tomorrow afternoon?

MICHAEL

1:43:40 Yeah, perfect. That works.

SUSAN

1:43:43 Awesome. Well, let me know if something comes up. You'll have my phone number, but otherwise, I'll see you at two o'clock your time tomorrow.

MICHAEL

1:43:52 Thank you Susan.

SUSAN

1:43:53 Great to meet you guys. Thanks for spending your late morning with me.

MICHAEL

1:43:56 Great to meet you. Thanks again.

The End