ServiceTrade Demo with Tye Electrical Contracting Ltd.

Brooke Caskey with Tye Electrical Contracting Ltd.
Recorded on 12/8/22 via Zoom, 1 hour 4 min.

Participants

SERVICETRADE

Brooke Caskey
Territory Manager

Amanda Vaughan
SDR

TYE ELECTRICAL CONTRACTING LTD.

Jenn Stewart

Topics

Transcript

BROOKE

0:00 Hey, Jenn.

JENN

0:01 Hi.

BROOKE

0:01 Hello? Hi. Can you hear me? Okay?

JENN

0:03 Yeah, I'm just gonna turn it up a little bit.

BROOKE

0:06 Perfect.

JENN

0:07 There we.

BROOKE

0:07 Go. Hello?

JENN

0:12 There. So you're not alone?

BROOKE

0:15 Reviewing that. I like talking to people not block squares.

JENN

0:19 Yes, I didn't realize it was off.

BROOKE

0:22 Thank you. How are you doing? I'm good.

JENN

0:25 Thanks. How are you doing?

BROOKE

0:26 Doing well. Just hold on.

JENN

0:29 Nice. Well, yeah, you're not here. Where are you again Washington?

BROOKE

0:33 Probably.

JENN

0:34 Okay. Yeah. So I mentioned over to here. So it's freezing cold.

BROOKE

0:39 No. Alright. So, I've got Jenn here and then what was your role? Again? I'm sorry, I don't know.

JENN

0:47 I'm the office manager. I'm running the office.

BROOKE

0:52 And then anyone else joining on your end needs that I need to know about?

JENN

0:55 For today? No, for sure.

BROOKE

0:57 Okay. Well, well, my name's Brooke, I'm the territory manager here at service trade. And really my goal for today's meeting Jenn is to take a look at service trade to determine if this might be a good fit for your goals software switch.

--- Purchase decision ---

BROOKE

1:11 And so first, I thought we could talk a bit about maybe your current process and your initiatives for switching software, what you're hoping to achieve through that. And then from there, we'll take a look at service trade if that sounds like a good plan.

JENN

1:23 Perfect. So right now, it's actually my, from my father's office, he started an electrical company maybe like 20 years ago or something like that, and he was just a one man show back then.

JENN

1:40 And now he has about eight to 10 employees at any given time and jobs happening all over. And I'm you know, training to take over the company and it, it's just, it can no longer be treated like a one man show anymore. So, hence, hi, I'm here right now.

--- Paper process ---

JENN

2:00 Basically, we just have a calendar of jobs like a Google calendar so that the operations manager can see what we have going on at all given times. And whenever we have a job, one of the guys, we print off the little email that we got with all the information on it, and we send that print out with the guys and then they make notes on the print out and bring it back to us. And so it's very archaic... at the moment. Yeah.

--- Paper process ends ---

BROOKE

2:32 Cool. So when you say jobs, I'm assuming that there might be different types of jobs you're doing. I did look at your website.

JENN

2:39 Huh.

BROOKE

2:40 Inspection, I'm guessing emergency service calls that you might need to patch. Okay? And then I saw there's might be some light Installation too.

JENN

2:51 Right.

--- Type of work ---

JENN

2:51 Yes, for sure. All of the, all of the above. And then we even still do a little bit of electrical work because we have electricians. And so every now and then we do get a call for someone wanting some kind of an electrical work done and so kinda do it all. So.

--- Type of work ends ---

BROOKE

3:08 And I did want to clarify, so I'm Amanda the Gal that you spoke with before me, yes. And that there's two company names.

                                JENN

3:15 Yeah.

                                BROOKE

3:16 That's I mean, is there a, it's two names?

                                JENN

3:19 My, my father started Tye, electrical because he was an electrician and that's what he did for like the first, I would say 15 years or so... and then he got into fire alarm and doing the fire alarm inspections and doing all of that stuff. And it kind of became his niche. There was more of that than there was electrical work. And so that's what he's been focused on for the past 10 years. And so he decided that instead of me taking over the electrical company, we created a new fire protection company and that's the one we're kind of building up... so that I can run that one. And he'll just closed down the electrical company kind of thing. So there's two at the moment, which is so very annoying. But.

                                BROOKE

4:13 Okay. So you're looking to prioritize acts fire? Is that right?

                                JENN

4:21 Proven fires, what it's called?

                                BROOKE

4:23 Proven fire?

                                JENN

4:24 Proven fire. Yeah.

                                BROOKE

4:25 I'm sorry, no worries.

                                JENN

4:27 Okay. They had, they acts wrong. That's okay.

                                BROOKE

4:31 In that case, I looked at the wrong website. So I'll look at the proven fire website.

                                JENN

4:37 That's okay. There isn't very much because we just started in March. Yeah. I had hired, yeah, hired a friend of my father's to do the website and so, you know, it's not where I want it to be, but anyways, we do all the same stuff is acts is actually close to us. It's a few blocks away. So that's funny. But yeah, we do all the same stuff they do. So.

BROOKE

5:05 Yeah, she must have just missed her reach you, but all good. We're prioritizing proven fire and then eventually gonna get shut down. So, as you're looking at softwares, you're looking from the lens of just for approval fire. Is that right? Yes, and worldwide or to that? Okay, just wanted to make sure just because when you talk about multiple branding.

--- Paper process ---

JENN

5:26 I know.

BROOKE

5:28 A different topic of conversation. So I wanna make sure we did or did not need to touch on that. Yes. Okay. So sounds like right now you're using Google calendar for your mix jobs in terms of the technician doing work in the field, how do they go about docking their Progress?

JENN

5:47 Phone calls, texts, emails, things like that. It's usually if they're doing an inspection, they had, they're doing it on an inspection report on their computer. And so that's how the document their Progress so far. But at the end of the day, all the guys come in and we have a sit down and they say, you know, I still have this much left to do on this job and they just kinda give us a breakdown and so we know what's left of everything?

BROOKE

6:18 Okay. But most of that is verbal or kind of manual?

JENN

6:21 Yes.

BROOKE

6:22 So, when it comes to engaging with your customer and keeping your customer in the loop with the work? How are you doing that with your current process of kind of the archaic?

JENN

6:32 Yeah, right. If they ever ask we, because we have the meetings, we're able to tell them where we are in the process, but also a lot of the inspections, they either take a

few hours or they take a few weeks and so obviously, the ones that take a few hours, we tell them that they're done and we're finishing up the reports and we'll get all the invoices to you and everything.

--- *Paper process ends* ---

JENN

7:57 And then we take, you know, a week or so to do that. But the longer ones they usually don't even ask until like two or three weeks have passed? And then they're like, is it done kind of thing? And we're like, yeah, it's done. And then it's the same kind of process, but...

--- *Accounting integrations* ---

BROOKE

7:12 Yeah. Alright. Is it a goal for you perhaps to maybe have that information readily available to them? So they don't have to house.

JENN

7:20 Yes, that they can check. I mean, that's the dream, you know, but.

BROOKE

7:27 Yeah, we'll definitely touch on aspects of that today and then it says Sage 50 for accounting.

JENN

7:32 Yes, that's what I use here?

BROOKE

7:34 Are you planning to upgrade that as you switch softwares?

JENN

7:37 I don't think so.

BROOKE

7:39 Okay.

JENN

7:40 Not anytime soon anyways...

BROOKE

7:43 Curious. And then you use Trello, what does that?

JENN

7:48 Yeah, we just started using Trello because one of our biggest... contracts is what the company that does all the city of them into buildings. And so we work for them who works for the city. It's kinda weird but they use Trello and it's like a job board that has all the jobs on it and that has, you know, the stages of it all and only the management uses it and we started using it to see if it would work for us... but it's kind of artsy for ti and I don't really like it.

--- Accounting integrations ends ---

JENN

8:28 And that's kinda why I'm searching for something different. It doesn't have all the things that I want and it definitely doesn't have the ability for customers to go on and see anything. And yeah, it's not the greatest but we started to just try to see, but.

--- Assets ---

BROOKE

8:46 Gotcha. Okay. So it, it's basically missing customer engagement as we get everything you want. Could you need more? Yes?

JENN

8:55 I would like to be able too because we work in a lot of different buildings and it would be nice to be able to look up a certain building and see when was the last time we were there? Any deficiencies that may have been fixed or anything that might have happened in that building or for that building kind of thing at one glance to be able to see that. Yeah, that would be helpful.

BROOKE

9:21 Okay. So since you can't see that and Trello now, how do you find that information?

--- Forms ---

JENN

9:27 You have to search through all the paperwork that we have, or we do have the inspection reports on a computer in folders per building kind of thing. And so I can go back and I can see the inspection report. So I can see when it was done. And if there was any deficiencies on it, it'll tell me on there.

--- Forms ends ---

JENN

9:48 And then I can go onto the accounting program to see how much we charge them for the certain work and all that stuff. But anything like communications with them or anything like that is not there. Unless I like go on everybody's email, you know, to try to see and that's just not feasible. So.

BROOKE

10:08 Absolutely. Yeah. Well, what I'll say is so far everything you've mentioned the customer engagement scheduling for the different job types, history, this deficiency tracking. We're kind of hitting all the basis of what service trade is built to do. So I'm definitely excited to just be today and get back. Anything else I should be mindful of in terms of your goals for selecting software?

JENN

10:34 We need like a calendar view that's what the operations manager uses lots even when he's out and about if he's running around and someone calls them in as like we need someone tomorrow morning at 10. He can just quickly go on the app and you can see what's going on at 10. You know, he doesn't want to have to dig around for the information. So a calendar view would be... perfect.

--- Deficiencies ---

BROOKE

10:59 Scheduling, what about quoting? So let's use the example of a deficiency found during an inspection that would log it, who quotes out. Is that the tech or the office?

JENN

11:12 No, it's the office, the text comes in with the information and it talks with the operations manager and says, this is what I think we need.

--- Deficiencies ends ---

JENN

11:21 This is what I think will happen. And then the operations manager or myself, whoever is available provides the quote for them for that job?

BROOKE

11:30 Okay, perfect. Yeah, we can look at that too.

JENN

11:33 And also, I wouldn't mind like office being able to see prices and dollar amounts and stuff, but my dad doesn't want any of the texts seeing any of that. So he wants them to be able to see what they have to do.

BROOKE

11:50 Hello?

JENN

11:51 Maybe how many hours they have to do it kind of thing, but he doesn't want them seeing like the actual dollar amounts.

BROOKE

11:57 Yeah. Yeah. Stuff like that. It's all permission setting. And even if you have like a lead or a more trusted technician, you can turn it, offer them. Yeah. So, yeah, all that's pretty easy to manage. Excellent. So I understand that it sounds like you're asked we're looking to make a change. Yes, that being said, do you have a due date for yourself on when you'd like to have something new implemented by?

JENN

12:23 No, basically, at this point, I was just getting all of the information that I could this month because it's really slow.

--- *Implementation and ongoing support* ---

JENN

12:31 And then I was hoping to have something even just implemented for myself come January and then I can play around with it a little bit. And then maybe at just like the office people to play around with it a little bit for the first few months and then start adding the two technicians and doing the training and, you know, all that stuff. So, you know, kind of ongoing kind of thing.

--- *Purchase decision* ---

BROOKE

12:57 Okay. So your goal is to start to get started, get the ball rolling and.

JENN

13:03 Yeah, in terms of, yeah.

BROOKE

13:04 Okay. So you fair to say you'd be looking to make a decision within December with the way the softwares are set up?

JENN

13:10 Yes.

BROOKE

13:11 Like gap between when, you know, say yes to actually getting started refresher.

--- *Accounting integrations* ---

BROOKE

13:17 And then Amanda had mentioned that you're looking at a few different customers or companies. Anyone who stood out to you so far?

JENN

13:27 I've only seen one. I saw... HouseCall pro. I already saw, I saw them but... I mean, I didn't have anything to compare them to. Yeah, I have heard so many good things, will you guys from more than one place.

--- Accounting integrations ends ---

JENN

13:48 And I think that might be where she got the name acts from because I was talking to one of the salesman acts and I asked them and they referred me to you guys. So that's why you guys are on my list because I didn't hear about you before that.

--- Purchase decision ---

JENN

14:05 So, yeah, I am also going to talk to BuildOps, Simpro, ServiceTitan and zipper. There's so many and it's just, I have no idea.

BROOKE

14:18 Got it. And you're just like me, I would do exactly what you're doing. I would demo.

JENN

14:22 Right. I just, I wanna see, I want to know. I need to figure it out so.

--- Purchase decision ends ---

BROOKE

14:28 Yeah. Yeah. In terms of like focus on the fire protection that's really where service trade makes the biggest difference because that's where our roots come from. So, our, okay, our founder really Marshall he actually started at a kitchen exhaust cleaning company.

JENN

14:45 Nice. And.

BROOKE

14:46 So that's I would say probably 60 percent of our customer base is fire protection, and then the other half is mechanical electrical.

--- Purchase decision ---

JENN

14:53 Right.

BROOKE

14:56 And then aside from yourself, you know, once you view a platform that really stands out to you, who else would you bring in to help with the decision? Or is it solely on you?

JENN

15:06 Would be well... the decision in the end with how much money it's gonna cost and everything comes down to the owner and me being able or my dad and being able to talk him into it, but for like the program itself and the usefulness and how it works and how it flows, it would probably be me and the operations manager deciding if it works for us kind of thing.

--- Purchase decision ends ---

BROOKE

15:30 Okay, perfect. And then what was your dog's name? And then the operations manager just so I have everyone, right? My head, yeah.

JENN

15:36 My dad's name is David.

BROOKE

15:38 Okay.

JENN

15:39 And the operations manager is that?

BROOKE

15:42 Okay. Gotcha. So... if today's meeting goes well with the next step be to set up a follow up with you, your daddy, Zack to kind of show it to them or would they need a demo too?

--- Purchase decision ---

JENN

15:56 I'm not sure that they would need a demo, but I, if all went well and, you know, I have all the information and all the prices and that kind of stuff. Then the next step would be for me to basically just have a meeting with them and lay it all out and be like, this is what it's this is what each one is and this is what we get and this is how much it is. And then, you know, they would ask me questions that they want to ask and we would probably come to a decision together. And then they would do the training. Well, my father probably won't do the training because he's on his way out, but Zach will probably want to do some training on the program as well as me kind of thing. But I think that the demo today is all that would be needed.

BROOKE

16:43 Cool. Okay, great. Well, I'm recording our session today. I hope that's okay. It's just for being helpful. And then I'll also set up a workspace for us to include some helpful resources like ROI, maybe some case studies from customers like you Stephanie you to speak with your data and talk about when you're perfect.

JENN

17:06 Perfect.

BROOKE

17:08 Cool. So any other questions before we get started?

JENN

17:12 No, I think we covered most of everything.

BROOKE

17:16 Yeah. And thanks again for all the contacts. I just like to make the time.

JENN

17:20 Yeah, no problem.

BROOKE

17:22 Yup. Okay. So I'm gonna go ahead and share my screen here. Let me know when you can. My fire alarm, it has my name on it.

JENN

17:29 I can see it. Yeah.

BROOKE

17:31 So, before we dive into the demo, I just have a quick background information about really service for its value proposition and why we're designed the way we're designed for our customers... first trade. We got our start about 10 years ago, recently, we just gained or a 1,000 customers. So that was an important milestone for an.

JENN

17:48 Hi.

BROOKE

17:50 And for the past decade, we've been exclusively focused on commercial service contractors. And like I mentioned, with a focus in the fire protection and like safety

industry, I mentioned before that our CEO really Marshall came from a kitchen exhaustive cleaning company. And the sort of story about service trade Foundation comes from him working in that industry and noticing that there was somewhat of a disconnect when it comes to your customers understanding the amount of work and effort and value that you put in for them on a day basis without proper documentation. So that being said, Billy went to build a system that will only would streamline processes internally but would also allow you to put your best foot forward to your customer, impress them and your relationships and intern road or service business. Cool. Yep. So we are all about data here at service trade.

--- *Customer engagement* ---

BROOKE

18:39 We're always setting our customers. We're looking at our customers that are performing well, maybe the ones that are struggling a bit, and we're always saying, okay, what could we be doing better? And for the customers that are performing well, you know, what do we attribute to their level of growth?

--- *Pricing* ---

BROOKE

18:56 So our flat average in terms of revenue growth across our customer base, right now, it's 25 percent. We have customers that grow as highest rates, you know, 45 to 50 percent annually. And as mentioned before, we're always finding out why, you know, what do we attribute this to?

--- *Customer engagement* ---

BROOKE

19:14 That? There's three main ways that service street helps. So the first one is through operational efficiency, making the most of the current resources you have. So utilizing your current team of technicians as you perhaps have to grow and hire more technicians out to the right jobs, give to them the resources they need in the field to be successful, like equipment history, you know, correct documentation, paperwork to fill out things like that, also scheduling in a way that makes geographical sense. So you'll have color-coded scheduling where you hey paying texts are in the northern part of town, orange texture, and the southern let's not cross windshield time for some reason, right? Giving you those types of resources.

JENN

19:55 Perfect.

BROOKE

19:57 And then look at these. And then for your customers, we wanna make it really easy for you to maintain positive engagement with them. I'm sure you're doing a great job with your customers, but we want to give you the tools to sort of stand out from your competitors, right? The people that are performing the same services, you, what makes you different? And that can really plan to the customer engagement

aspect of things. So things like a customer portal or a detailed post service support with pictures, videos on email, those outlet?

--- Deficiencies ---

JENN

20:25 Yes.

BROOKE

20:27 And small things like sending, hey, I'm all the way memo with your technicians photo and saying, I said about 15 minutes. So going while. Okay. And then the third way that service trade helps increase revenue is through deficiency tracking, making it really simple for technicians to find efficiencies, get those documented from our mobile app, and then they can wire it to basically when they report deficiencies, you can send it to whoever needs to do the quoting and the office, so they can review what was founded.

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

BROOKE

21:00 Flip it into a quote, get backbone set sent out here's. A quick example of one. Yeah, it's a really easy for the customer to with because you've got the pictures right on them, the description of the issue and then approve and request changes and we'll look at it.

--- Customer engagement ---

BROOKE

21:14 And obviously, as you did version of this later. But the faster you can close that loop from field office to customer approval, the faster you get a thumbs up on that work and you're out there, completing that repair, increasing your revenue on work that you're already doing.

JENN

21:29 Yeah. So.

--- Pricing ---

BROOKE

21:31 No idea of what you could accomplish by maintaining that process. So with eight technicians, if at the very minimum, we can help you create one additional job through pull through work per week at four weeks in a month. Let's use 500 dollars as an average job cost here's. An idea of the revenue that you could accomplish by applying best in class orchestrate.

--- Customer engagement ---

JENN

21:52 Nice.

BROOKE

21:54 So, based on that quick background, does it sound like service trade aligns well with your goals for?

JENN

22:00 Yeah, for sure.

BROOKE

22:02 Hello. So switching over to the demo portion I want to pay, we could start in the office here. And then we'll jump out to the field, both the technician together and then some of the customer facing view as well, the portal and all that.

--- Customer engagement ends ---

BROOKE

22:19 So starting here on our dashboard... I like to start here just because when you log into service straight from an office perspective, this is your landing page. So first it's going to show you your daily schedule. You'll be able to see your technicians, what type of work they're doing today, where they're headed Progress of completion. And then from there, a service fee is going to provide a helpful checks and balances system. So the ability to see the fact that you've got 24 overdo jobs without appointments allows us to be proactive on sort of rectifying those mistakes before our customers calling us, you know, ask questions about why we haven't been out there yet. If you have jobs to you soon, there's another bucket for that. I just, I guess I just don't have any, but it'll say like, hey, you've got these jobs do in two weeks?

JENN

23:01 Okay.

BROOKE

23:02 Yep. And then walk past jobs to be marked complete. So this indicates that the technician has done their work in the field. They've marked as subset I'm all done. But checks and balances were having the office review as well just to make sure nothing's silly was missed. You know, no spelling errors before the final coffees released to the customer know that some of these jobs have blogs on them. So these indicate deficiencies found. So is this tool Q for your team and the office? Perhaps this might take priority because, you know, right there that's three jobs where there's opportunity for revenue more, let's make sure we have a quote sent out the right parts ordered if that's needed.

JENN

23:41 A...

BROOKE

23:41 Visual queue for you. And then down below, we have completed jobs to be invoice. So pretty self explanatory, but we wanna make sure we're helping you keep track of all of your billing opportunities.

BROOKE

23:56 Everything seem pretty clear here. Any questions?

JENN

23:58 No, it's laid out really nice.

BROOKE

24:01 Hello. So over here, we have our pretend customer for today.

--- Recurring maintenance ---

BROOKE

24:05 So we're working at blackberry diner before I get into this question for you. Yes, customers you work with are a lot of them, do they have like multiple sites under one company or?

JENN

24:16 It's it's a mixture. Some of them are like lots of sites like the city of Edmonton, and then some of them are just like one restaurant, one hotel kind of thing. So.

BROOKE

24:27 Yeah.

JENN

24:27 It's a mixture.

BROOKE

24:29 Yep. So we can handle both scenarios. But being routed in commercial, what something we're really good at is multi site. So you can have your one main company headquarters. Let's use McDonald as an example, right? And mcdonalds, and then you've got the 16 mcdonald's under that one, you know, headquarters that you service.

JENN

24:46 Hi, this is.

BROOKE

24:47 One of the locations. Okay. Yep. So at each location, you'll have your points of contact as many as you need to. And then you'll have the services that you perform for them. So whether that's a one time install the recurring inspection repair job, that can all be documented on the location page.

--- Assets ---

BROOKE

25:05 So, okay. You examples here and let me click into my alarm one that's what we're gonna do today. Okay? So each service you're gonna tied it to an asset in service trade, the asset is your customers equipment that you work on... even have a pricing or not pricing.

--- Recurring maintenance ---

BROOKE

25:23 You can have templates in service trade. So you'll have your description perfectly, bring items, and then you can preferred technicians who is best suited for that work for that specific customer. Have that option that reoccurs. Okay. So think of this as a set and forget, you set it up one time. And then the system actually keeps track of it for you. Perfect. And if I click to the right, you can even see like the months of their do it's gonna show.

JENN

25:49 Okay.

BROOKE

25:50 Yeah. Okay. And then also on the location page here's, all the jobs we've done this diner.

--- Assets ---

JENN

25:57 Yeah, that's perfect.

BROOKE

26:01 And they're in chronological order to have hyperlinks. So customer calls you about the most recent job. They did. Most likely, it's right at the top for you. We just clean guy.

JENN

26:10 And even says who went there? Nice. I like that.

BROOKE

26:15 Then customers equipment, of course, we'll keep track of all of that for you can dive into each of these individually. So if you only want to see that alarm device, just click on the link and you'll see their profile of, hey, we've done X, amount of jobs job. This amount of deficiencies is the quotes tied to it here's. A picture of it even. And so you can kinda use this to figure out who's best suited for the job. Okay? And then I'm wrapping up the location page. Of course, we're going to keep track of deficiencies and quote history, but the small details that you might not think about now, like the ability to leave a recurring comment with the lockbox folder, the door.

JENN

26:55 Right. You.

BROOKE

26:56 Know who to talk to things like part and then attachments. So being able to put on like a site map or condition?

JENN

27:05 Right. Nice.

BROOKE

27:08 It sounds like the data on a location page, you could see that being pretty helpful to your office.

JENN

27:14 Yeah, for sure. I mean, some of our, some of our sites or like a waste management center of Edmonton, and there's like a whole bunch of buildings. And so, you know, even just to have the attachments there to be able to put the buildings and label them and everything is helpful.

--- Dispatch ---

BROOKE

27:32 Yeah, absolutely. So cute these services in mind as we go to our next step because we're gonna talk about how you can forecast what's up ahead and then schedule on that map based scheduler I showed you in my slides there. So what I have here is a report I ran and service trade. This is called service opportunities. Essentially, what this does is it pulls up your jobs that are to buy a certain due date. So I've said show me my jobs do in two months, but you can be, what, do you want? My favorite suggestion is to do an overdue job?

--- Recurring maintenance ---

JENN

28:03 Do...

BROOKE

It once a month, make sure nothing fell through the cracks.

JENN

28:07 Her...

BROOKE

28:07 My jobs do in two months. If I click on Brooke house here, I can see that in February, I have the following services. Do. So it looks like a sprint for instance, cleaning, okay? Pull in the sort of the preset rules. So my description, you can even see it has me as the preferred technician there expert automatically from the location pages. So you would run your report, you would select the job type as inspection and you can create these one at a time. But let's say you run a report of solely inspection jobs, you know, that they're all the same job type. What you do is you could click that box right at the top. Okay? Actually bulk create as many jobs as you want.

JENN

28:48 Wow.

BROOKE

28:49 Okay. Yup. So those are all right. That's what you're going to generate work orders. Now, I need to save some for the other people that do demos here.

--- Dispatch ---

BROOKE

28:56 So I'm just gonna create five. But here I am create work orders. And now I am going to go over to my map based scheduler and those work quarters are gonna populate at where the address of the job is. Okay. Do you see here represent jobs? Okay? And then over on the left, you'll have your technicians at your small look as chaotic is mine?

JENN

29:21 Right.

BROOKE

29:22 Yeah. They're all color coded. Okay. Getting, you can use this to schedule in a way that makes geographical sense. So, for example, my inspection at your quote way, who is best suited for this? We're going to send this to Billy. He turns lime green, sent him, please let's send him and let me click on. It takes. I want to Zoom in less than billing on Saturday. And okay, idea ability is already in that area but sent him to language too.

JENN

29:52 Okay. So when you created the jobs, it didn't automatically put them on the schedule and just put them on the map. Yeah. And then you take them and decide who is doing it. And then you can put it on the calendar after that. Yeah.

BROOKE

30:04 The ability? Okay. Yeah. All that seem pretty simple.

JENN

30:10 Yes, for sure. And it shows a little calendar on it. So, you know, that it was scheduled. I see. Okay?

BROOKE

30:17 You know, because sometimes you can just assign it and you don't know what time they're going to go yet. So like in that case, it just turns orange.

JENN

30:22 Just stays there color and then you just leave it. Okay?

BROOKE

30:26 Yeah. And you can have multiple tax on a job multi day. So, very flexible there. And then you mentioned that you guys do some emergency calls, right?

JENN

30:35 Yes, for sure.

BROOKE

30:37 So, this view is more for like, you know, recurring things that you can forecast ahead of time for walls. I might recommend using our dispatch board. You would just have your one office. So just ignore these ones. But essentially, this is a day to day view of who's available to go where and when, right?

JENN

30:56 Okay.

BROOKE

30:58 Say a customer calls in. We just go add job will ask where they're calling from. And so we'll say that Jenn at blackberry diners, Collan, she has some sort of emergency.

JENN

31:09 Well...

BROOKE

31:09 For what is wrong? Jenn, and she'll say something is wrong with my sprinkler system is leaking so you can put in the problem. She indicates we need them out there today as soon as possible.

JENN

31:25 Right.

BROOKE

31:27 And obviously, we'd be a little bit more detail than I am.

JENN

31:30 Yeah.

BROOKE

31:31 Well, and then we'll go ahead and drop that on Jack's calendar because we can see that here.

JENN

31:35 We could see he's...

BROOKE

31:36 Available. Okay. So here, that is on Jack's calendar. And this is pretty interactive as well in terms of drag and drop. Maybe we take it for Brooke because she's they're already.

JENN

31:48 Right.

BROOKE

31:49 You can make the job longer. So, okay, cool. Any questions about the two scheduling processes before we talk about our report or?

JENN

31:59 No, they make sense. I like this that I can be able to just see who's available right now kind of thing?

BROOKE

32:06 Awesome. Cool. So, like I mentioned, I noticed I had an alarm inspection do over at my blocker diner.

--- *Quote templates* ---

BROOKE

32:14 And so I went ahead and I created that work order for us. And because that was part of my recurring service, I have preset again, my description parts labor in items, price duration. Again, that's all permission setting all about that for me automatically. So there is double data entry.

BROOKE

32:31 It's literally just, hey this jobs to click. Yes. And then since service trade is a cloud based platform. As we head out into the field here, looking at our clock events, any deficiencies, we find pictures, we take everything we do as a technician is actually gonna relate back in real time to the office. Nice. I'm following along as the work's being done. Okay? All righty. So let me go ahead and switch to the mobile view.

JENN

33:00 Yeah. Now I can see what the guys will see.

BROOKE

33:03 Yeah.

JENN

33:07 That's important because the texts are kind have special sometimes.

BROOKE

33:12 Easy as possible. So.

JENN

33:13 Good.

BROOKE

33:15 So, can you see where it says locker diner and I have appointments?

JENN

33:18 Yes.

BROOKE

33:19 So this is the service trade mobile app where iOS and android friendly phone and tablet. I'm completely your preference on what you wanna use, perfect and your permissions log into their app. The first thing that they're gonna see for simplicity reason is their jobs to your, their jobs for today. So I've just gone, okay, the unscheduled work assigned to them and they can see their completed work.

JENN

33:44 Okay. But they have to like actually click over so that's good. It's not all in one. Okay?

BROOKE

33:49 Yeah. Yeah. We just try to keep it kind of like as folders for them. Yeah. So focusing here on my inspection that black bear diner I'm clicking on or quarter. And here it is.

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

BROOKE

34:00 So the purpose of this as it should be resourceful intuitive and set them up for success. When working with this customer, first thing that I'll point out at the bottom, it says clock events, so cool. But your onsite you're in route and your job prep.

JENN

34:16 Good.

BROOKE

34:17 And so your technician can clock in and saying, hey, we're driving leaving here's. A notification letting me know what time line might be there. Okay? And then say they get there, they clock out. It's gonna prompt them to clock in on site. Now struck... nice. So now that I'm clocked in on site, I'm going to go up here to services and go look at what I'm here to do today.

--- *Assets* ---

BROOKE

34:41 So keep in mind the verbiage I show you today is just pretend you'll have your own checklist or description. Shins, I know what I'm here to do and I can go down here to assets and kind of take a look at the piece of equipment I'm dealing with. So in this case, here's, my alarm device I'm working with, I might make sure, you know, make model serial number are all up to date, of course, picture in there. I might take one just to see that as a reference point. But more important than that, I'm going to access the service history? Okay? So here's every single job done on this specific device, just so it's easier for them to narrow it down? Okay?

BROOKE

35:23 And from a technician perspective, I might go into the most recent work order, you know, see what was their last time things like that? Could you see your technicians appreciating having history at their fingertips? Like?

--- *Paper process* ---

JENN

35:36 Yes, because if they don't know the history, they just call the office and we have to try to find the history and, you know?

BROOKE

35:43 Yep. So it's a win for both of you because it's...

JENN

35:46 Yeah.

BROOKE

35:46 You reduce the phone call radios, I call it.

JENN

35:49 Yeah, that's true.

BROOKE

35:53 Now, in terms of filling out inspection forms, are you just sending the form with your tech now and they fill it out on paper or how is that done?

--- Forms ---

JENN

36:01 It's all done in excel. We have a, an excel template done up and they fill out on the excel sheet, everything that is needed.

BROOKE

36:10 Gotcha. Okay. So, the way that it could work in service trade is through syllable PDF. So essentially, you can give us any sort of form that you want us to PDF and we can turn it in to one for you or you can do it, okay. But essentially the system smart enough to dispatch the right paperwork type according to the job, they're on, you pretend forms in here just to give you a good idea, but they'll generate their paperwork and open it up and Adobe, which links directly to their, what quarter?

JENN

36:40 Yes.

BROOKE

36:41 And then it's a digital fill in sign. You'll see that some of the information auto fills to just to save some redundancy, right? They can go ahead and pass fail.

JENN

36:52 Right, perfect.

BROOKE

36:53 Okay. So as soon as they're done with that, they'll just send a copy to service trade and there are good to go with their people.

--- Deficiencies ---

JENN

37:03 Perfect.

BROOKE

37:05 So, let's say that as we are completing our inspection, we identify that there was some sort of malfunction on the alarm of let's say there was a broken panel. So we're going to go up here to deficiencies, right? And we're going a little nuance that we're able to get that information back to the office to seamlessly as possible. Okay? I'm gonna go ahead. They could do voice to text too, but.

JENN

37:28 Nice.

BROOKE

37:30 And then they're gonna take photos...

JENN

37:33 Right, and attach all nice lamb.

BROOKE

37:38 So, there's our alarm. And then if they took perhaps on their camera role, they can add those into. So whatever they need to do, they can take videos, audio memos, and then they'll mark the severity of it. So sometimes with your customers, you might make a suggestion to them that they maybe put all.

JENN

37:57 Yes, yes.

BROOKE

37:58 In this case, you have the ability to sort of what the ipod around and say, hey, we were here two months ago, we made a suggestion our bubble. And so Mark the system we're working with. And then a market is new. And then as soon as I save this again, the person in charge of quoting is going to be email dogs.

--- Pricing ---

JENN

38:19 So the 48 deficiencies that it's showing, there are those all the open deficiencies? And so if we went in and fixed one of them, will it removed from the 48?

BROOKE

38:29 So, the 48, the grand total. So you see an open fixed all. Okay. Yeah. So, okay. And then if I click, you can see it changes the parentheses.

JENN

38:40 Right. So when it fit, it's fixed, it's still shows the number of 48 in there.

BROOKE

38:46 That's just the grand total of the site.

JENN

38:47 Just the grand total.

BROOKE

38:48 Okay.

BROOKE

38:55 But in terms of the reporting process for the deficiencies, what are your thoughts on that from a technician perspective? How?

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

JENN

39:01 Right. Yeah. No, that looks good and simple and easy enough for them to be able too indicate what is going on and us being able to see that as well. For sure. That works.

BROOKE

39:15 Cool. Well, before we go back to the office and flip that into a proposal, one thing I always like to encourage is, you know, engaging with your customers as much as possible especially from like a liability perspective, making sure everyone's same page.

--- Tech On-site ---

BROOKE

39:29 So something we have is that work acknowledgement, you can go to their main point of contact if their own site, you know, select their name and then review with them what was done so far. So in this case, so Jenn, we came out for your alarm inspection today.

--- Deficiencies ---

JENN

39:44 Right.

BROOKE

39:45 Yeah. What I did hear some paperwork, I filled out some pictures. I took everything went great, but there was one issue with your alarm panel. I documented it. We're going to get a close out sent out to you soon. Do you approve of what I've done so far?

--- Tech On-site ---

BROOKE

39:59 Then they'll say, yup. Good to go review. And then they can confirm and sign. Okay, I'm sending you a quick copy. So I hope you don't mind me 14, your signature there. Yup. And so... anything here that you're curious about that I didn't quite click into?

JENN

40:21 So, will it, does it have the ability to like say if a guy goes on the job, he has to do these things before he can finish before he can even clock out, will it like tell him you still have this to do kind of thing?

--- Tech On-site ends ---

BROOKE

40:42 So, at service trade core application, what I'm going through today, there's no like... barred parameters within the system and we do have a suite of products that a lot of our customers grow into. One of them is a, an advance form completion product that doesn't it won't let the form unless they've completed it. But I recommend getting started with core service trade, learning this and let you know about.

--- Tech On-site ---

JENN

41:12 And then moving on, okay, we're just curious because they also have to fill out there... field level... like safety assessments at each job site, right? And so I was just curious if I could like notify them do this before you start working.

BROOKE

41:31 Yeah. And it's an option in the future, but even here we try to make the visibility so clear for you in the office being able to, in real time that, hey, maybe as you're reviewing this job and they're still on site, you catch that they missed align on their inspection for.

JENN

41:46 Right.

BROOKE

41:47 And it's...

JENN

41:48 Yeah.

BROOKE

41:49 Yep. Okay. So from here, go ahead, clock out, it's gonna ask me what I've completed. And then, okay, cool. Yep. I'm all done with that visit and then we'll head back to the office. Okay?

BROOKE

42:13 Okay. Can you see my job?

JENN

42:15 Yes.

BROOKE

42:24 Try to keep my tabs to a minimum to save my connection.

JENN

42:28 I hear, yeah, sometimes it's hard isn't it?

BROOKE

42:33 All right. Here we go. Okay. So here is the Progress we've made on our work order from an office perspective. So here we can see the tech market as completed, but we're still in Progress from argue because we're doing that review. And then looking here, we can see our clock events. So.

JENN

42:49 Okay. So then I could see they were on route and okay.

BROOKE

42:53 Yeah. You can also see that they were about 2000 Miles away from the job site. So maybe a phone call to make. And then here is our deficiency. So we'll quote that out in just a second here. Alright? So there's that job paperwork. Yeah. Okay. There's the work acknowledgement that we gave this.

--- Deficiencies ---

JENN

43:12 Okay.

BROOKE

43:13 Yep. So everything is in real time but focusing here on our broken panel. So this is a report that whoever is doing quoting the office would be sent... and it's going to show them everything they need to know to quoted out. So perfect. Here we go. So we can see that it's been marked as an offer both.

--- Quote templates ---

JENN

43:36 You, how many days ago it was discovered that's kinda nice.

BROOKE

43:40 She thinks we should fix it. It's this is the eight times happened.

JENN

43:46 Mine...

BROOKE

43:48 Here on the picture she took. So from here, we use this information, we add this to a quote or create a new one. You can set expiration date if you want to. And then we'll start building out our quote. So part of your onboarding with service trade is going to be creating templates. So you'll create service templates in quote templates as a way to help you save time because if you're putting out this type of deficiency repair on a regular basis, there's no need for you to type each time.

JENN

44:15 Right. Yeah.

BROOKE

44:16 Okay. I have a few pretend ones in here. So we'll use this one and then the verbiage parts, labor items. It's gonna pull through and we wanna make it as quick as possible for you to get quotes out, right? You got the margins reflected as well. You know, should you when this work all control over how you present pricing? So, do you tend to do a grand total or do you like to break out line items?

JENN

44:44 I usually break a line items depending on what kind of work it is. But when it's deficiencies, they usually like to see by line what each one is.

--- Quote templates ends ---

JENN

44:55 And because sometimes they say I can only do this week. And then I have to do the rest next week. You know what I mean? So.

BROOKE

Yeah, perfect. And it sounds like you might be working sometimes with multiple deficiencies found on a job site. And so we just have the one example today, but you can have as many like on a proposal.

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

BROOKE

45:14 Perfect. Here, we'll go ahead and send this to our customer. So I'm gonna send this to actually, do you have access to your email to energy?

JENN

45:22 Yep.

BROOKE

45:22 Okay. Let me know when you see it's. Gonna say quote for a pair from fire.

JENN

45:30 Your fire?

BROOKE

45:32 And you might see the work the management I sent to and the notification saying that I'm on the way.

JENN

45:39 Well, yeah, fire fires on the way... that's a nice email too, right? It's not too busy. It's not too much credit information that they're trying to scroll through it's. Just simple.

BROOKE

45:52 Yeah.

JENN

45:54 Fire central work acknowledgement. I can actually click on. It... pulls up the lovely PDF. We are showing all stuff we did... showing the deficiency. Yes, cool. Signature.

JENN

46:21 That's cool.

BROOKE

46:22 Yeah. Did the quote email come in?

JENN

46:26 Yeah, sorry, I was too busy looking at this one on. I can even click on the... files and folders within the PDF that's cool. Yeah... there we go. Quote for repair.

BROOKE

46:41 Perfect. Yeah, go ahead and click view and respond to quote details. And then you'll land on the same page I'm on.

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

JENN

46:50 Yeah. I think one of the, I think one of the sub contractors that we use for some stuff. I think they use this because every quote they send me has the, this exact stuff on it.

BROOKE

47:05 Okay. Who is it?

JENN

47:06 Or a Stirling?

BROOKE

47:08 That sounds familiar. Let me... see.

BROOKE

47:30 I think you might be right?

JENN

47:33 Yeah. So, because sometimes, you know, there's just work that has to come up and we're short guys or... something like many things. And so I just quickly call them and say, can you have someone come out on this date? And they say, sure. And here's the quote and accepted and it's yeah, it's kinda nice.

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

BROOKE

47:52 Yeah, cool. So, you're pretty familiar with that because I was gonna good for me... if you have it open. Would you mind if group again just so I can show you how to work quarter?

JENN

48:05 Hello, please, make sure your name and email address, correct? Cool. Enter your purchase order number. If you have one checking, this, confirms you have read cool. Got it, even tells me approve.

BROOKE

48:21 And now it tells me too, and it's a date and time stamp right there with your name. And then one neat thing about service trade is that we track the life cycle of your quotes. So, meaning that you can run reports within the system of your quotes for different status based on if they've been viewed if they haven't been viewed. So here we have the history of, hey, Jenn looked at this quote. I even have your IP addresses creepy.

JENN

48:48 Hello?

BROOKE

48:48 And I can see that you approved it at this date and time. So if you've got pesky customers that are saying we never got it, never solidly, they're talking about like if they're telling the truth or not.

JENN

48:59 Babysitting job that's my job is a babysitting job, right? 100 percent.

BROOKE

49:03 And then you can run reports on that. So you could say like service trade, show me my quotes with that have been viewed and not responded to yet. And let's book resend those to get it to the top of their inbox. Cool. Now, from here, since our work has now been approved, what we can do is there's some like of thoughts. So whether you want to add it to an existing job, if the question is not busy for the rest of the day, it's super easy thing to get approved. Let's just add it to the existing inspection or if it's more complex, let's create a brand new job from that quote. Okay. So it depends on the situation to my current inspection we were on.

BROOKE

49:42 And then we'll copy or attachments that's very.

JENN

49:46 Hi, Andy. Because sometimes it's a, to both. Sometimes they're like just add it to the quote to the po that we've already given you. And other times they're like don't ever do that. We will give you a new po, you know?

BROOKE

49:58 Yeah. It's just, it's based on what's best in this situation. So now we can see that this approved repair is tied to my original inspection. Hello quarter. So let's pretend that we went back to the field. We did the repair. Everything's good to go. Mark that as complete wherever you from the office.

BROOKE

50:19 And from here, we can complete this job and create our invoice to Bill out what we've done for the customer.

BROOKE

50:29 So here we have where we can adjust our quantities and cost is needed. I'm not going to be too picky.

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

BROOKE

50:52 And then just like the quote, it's going to show us our margin on the job and have how to present pricing to them as well. And then... you guys are remind me where you guys are located?

JENN

51:06 Alberta...

BROOKE

51:08 So you'll have the ability to send the invoices through service trade and here's what it would look like.

BROOKE

51:22 You got your company logo at the top left, pricing, whoever you wish to present it to them. There's combinations. And then the notes left by the technician, full disclosure, our friends in Canada. I do not have to pay now button. So it's here, but it's not available to you guys yet.

--- Invoicing ---

BROOKE

51:39 Something we're working on it's our integration partner, but you can still input payments service trade pretty easily. And I'll show you that in just a second. But most importantly, the invoice here, it has the go to service details, and this lets you take the customer to a detailed post service report outlining all the fields. So just like the work acknowledgement.

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

JENN

52:02 Hi, tied.

BROOKE

52:03 To the invoice, just so they understand where the resources are going.

JENN

52:06 Right. And what happened and what we did, and.

BROOKE

52:08 Yep. So the inspection, the fix, broken panel, you can include parts, they ran items, any relevant comments. There's a way to go through this document before you're sending it and sort of blah, blah, blah. And what do we want to include? And whatnot? And then here's the files. And then here, it's not fixed broken panel.

BROOKE

52:32 So, do you see how a document like this is gonna help your customer better understand what?

JENN

52:37 Yeah. What was going on? Okay? For sure?

BROOKE

52:43 And in terms of inputting payment and service trade pretty easy. So, how do most of your customers pay now?

--- Invoicing ---

JENN

52:50 Checks or email money transfer?

BROOKE

52:53 Okay. So let's say they send you a check, you'll just go add payment out in a reference number, and then check in whether it's the full payment, our house payment or whatever it is. You can swipe and then it's gonna mark is paid.

JENN

53:07 Cool.

BROOKE

53:08 Yeah. So we get you from, you know, the very beginning scheduling all the way through the end of invoices, invoicing, even collecting the payment. And then you guys get the details to Sage.

JENN

53:19 Yeah, for sure.

BROOKE

53:21 Okay. Now, I guess the one last thing we could talk about here is the customer portal because you mentioned that would be something you'd be interested?

--- Invoicing ends ---

JENN

53:31 For sure to have them be able to see how I want to see what they're gonna see for sure.

BROOKE

53:37 Is that something that your customers have asked you about or what kind of sparked the curiosity there?

JENN

53:43 It was just mostly not even for a lot of our existing customers because they're all set up and they've been doing it for years that way, but it was mostly for new customers that I was thinking, you know, if we get somebody at the holiday inn, you know, it might be nice for them to be able to see exactly what we're doing and what we've done and when we're coming and all that kind of stuff.

--- Customer engagement ---

JENN

54:07 And better than having to call an email us constantly, although I know that some of them like to do that. They like to make the connection, but some people don't and so.

BROOKE

54:21 Yeah. So for your customers here's, an idea of what the portal could look like. So, ideally, this is plugged into your website. Do you know if you have a Wordpress website?

--- Dispatch ---

JENN

54:33 Don't know.

BROOKE

54:35 So you would either need a Wordpress website or Wordpress plugin. Okay. There's workarounds for bowl, but essentially, they can log in and see just like you said, you, their jobs first day, upcoming jobs, do soon previously completed jobs. They can dive into their individual location, whether that's one or multiple, their equipment that you work on.

--- Customer engagement ---

BROOKE

54:55 They can see what was service before any deficiencies tracked on specific assets. They can track deficiencies in quotes as a whole, okay. Quotes, you know, type loose ends, all that fun stuff. And then they can even request service within the portal.

JENN

55:11 Cool.

BROOKE

55:13 Yeah. So, does that align with what you'd be looking for in terms of customer engagement?

--- Customer engagement ends ---

JENN

55:18 Yes, for sure. Because right now, we have a couple of property management companies and they just pop us off emails when there's a job that they want us to go to, which is okay. But this one, I'm assuming if they do the service request, it puts it right into everything for us. And so we don't have to do extra steps. So that's nice.

--- Purchase decision ---

BROOKE

55:39 Yeah. Yeah. And then it populates on the dispatch board.

JENN

55:43 Yeah.

BROOKE

55:45 Okay. Cool. Well, that was kinda my plan for today in terms of the functionality, I wanted to walkthrough based on our conversation, what are your thoughts on service trade? Being a good fit for your goals?

JENN

55:59 I really like it seems to hit on all the things that I needed to hit on... especially the customer portal and even the app that the guys be using seems very simple and you hope that they can handle it.

--- Purchase decision ends ---

BROOKE

56:19 Well, anything I didn't go through that you're curious about?

JENN

56:24 No, I think I asked as we went along kind of thing, the questions that I was wondering. The only thing I want to know, is there a limit to the data? Like?

BROOKE

56:37 There's no. Okay. Yeah, we work with Margaret fire. Not sure if you're home, they'll put them, they have 600 technicians and they have, it breaks it out a little bit.

JENN

56:47 Okay. Well, good. That was, I was just curious.

BROOKE

56:51 Okay. Perfect. Does it make sense to review pricing?

JENN

56:58 Yeah, for sure. All of it... seems good. Seems very good.

BROOKE

57:03 Okay. Perfect. So to show you what I'm talking about, let me, I'm going to calculate this, but just so you can follow along with me. No, our pricing is very, on our website. We try to be very transparent about it and what the first year?

--- Pricing ---

BROOKE

57:18 There are some one time onboarding fee. So based on our conversation today, I recommend the premium tier for you. This gives you access to any sub contract work, the portal. If you did want to discuss integrating with any accounting systems aside from Quickbooks, you'd require premium too. So that's just based on our conversation today, I think that's the best place for you to land. Okay? So that being said, you said it was eight technicians to start?

--- Pricing ends ---

JENN

57:46 Right now, yeah.

BROOKE

57:48 So...

--- Pricing ---

JENN

58:01 So, we pay per technician, but not for office. Yeah.

BROOKE

58:06 So it's...

JENN

58:06 Per...

BROOKE

58:07 Per mobile technician in the field. Okay? It's users are free. So... according to my math with eight technicians at it's one 39 per month per tech build annually. And then there's the one to have our wall onboarding fee. So your first year total would be the exact number 16,844. So I'm not up to 17,000. Yeah. And then deducting the onboarding fee, your annual recurring cost to maintain your premium licenses is 13,344. And that covers you for.

JENN

58:46 Right.

BROOKE

58:46 Hey, tex. Okay?

JENN

58:47 Perfect. Hi, missy writing?

BROOKE

58:54 And then the only other fees in terms of onboarding is just if you want us to create a syllable PDF for you that's okay. Callers. Yeah, it's 150 dollars, one time per fill ubl page, but if you don't want to us to do that, you know, it's easy to go on YouTube and learn how to it's. Just more of like, hey, do you want to spend the time?

JENN

59:13 Right. Okay. And you said it was 150 per page?

BROOKE

59:18 Yeah, perfect. Okay. We would need to create. So just one time for each page. Okay? Yep. Perfect. How did again?

JENN

59:26 That's that's something that I could figure out and do myself kinda thing.

BROOKE

59:30 If you want to, yes... yes, some people are like, I don't want to think about it, take it off my back and then other people totally, I think it could be a friend.

--- Pricing ends ---

BROOKE

59:39 So it's up to you.

JENN

59:41 Knowledge, I like some knowledge.

BROOKE

59:45 How does that pricing aligned with maybe whatever budget you might have discussed with your data and dog?

--- Pricing ---

JENN

59:51 You didn't really discuss a budget? It was just my job to check out and see which ones worked and the cost of all of them. I will be honest, it's kind have a big pill to swallow from nothing to that. You know what I mean? Like I feel like they might say we need an in between step for a few years before we jump up to the big goal 17,000 dollars or even 13,000 per year kinda thing.

--- Pricing ends ---

JENN

1:00:22 But the program itself looks great and user friendly and all of that stuff. So that part is good for sure.

BROOKE

1:00:31 Yeah. You know, I hate for pricing to be the one thing that gets in the way. So.

JENN

1:00:36 Yeah. Well.

BROOKE

1:00:37 If you, if you sort of settle on a number that you want to stay close to let me know. And like I'm willing to advocate which vendors that you guys are ideal customer profile being built for fire, I can't make promises of course, but.

JENN

1:00:52 No, of course. Not. I get it. I get it. But yeah, just let you know after we have our conversation, I can definitely say, okay, so they said this and then we can go from there.

BROOKE

1:01:03 Yeah, definitely. So from here, would you say it makes sense to schedule a meeting with your data, doc to sort of discuss further?

JENN

1:01:15 I will have to discuss with them when I have all of my day is done because I have like six other ones today or whatever it is. And I know it's going to be a long day, but that's okay. Once I'm done with all of them, then I can, you know, get my report together and say these are all the ones that I think will work and this is what they cost. And then I probably wouldn't even talk about the ones that I don't think will work kinds of things. So.

BROOKE

1:01:46 Yeah, no, that makes sense. You're doing all of them today?

JENN

1:01:51 Yeah.

BROOKE

1:01:51 Wow. Okay. So would it make sense for me to give you a call maybe Monday afternoon?

JENN

1:01:57 Yeah, my, maybe later in the week, okay? Because I'm I'll need the time to talk with David, Zach about everything first before. So maybe later on in the week.

BROOKE

1:02:09 Okay. Well, hey, Friday, Thursday. Okay. What about Thursday?

JENN

1:02:14 Yeah, that works. Just a phone call. Yeah.

BROOKE

1:02:18 Yeah, just a phone call and I'll send you right to, just so it's on your radar because I'm sure.

JENN

1:02:22 Perfect.

BROOKE

1:02:23 Perfect. What time forms Edmonton pacific?

JENN

1:02:27 Mountain...

BROOKE

1:02:28 Mountain? Okay. So.

JENN

1:02:29 11, all three right now?

BROOKE

1:02:31 Okay. So, on Thursday would morning or afternoon work better for a phone call?

JENN

1:02:37 Probably in the afternoon.

BROOKE

1:02:39 Okay. So, how is one PM?

JENN

1:02:44 One PM is good?

BROOKE

1:02:45 Okay... cool. Yep. So, I'll just call you to check in and see sort of what next steps if any makes the most sense?

JENN

1:02:53 Yeah, for sure. And then at least I'll have more information and more knowledge on what we're doing or what we're thinking of doing or whatever. So.

BROOKE

1:03:02 Okay. Yeah, perfect. I'll go build out that workspace for us for you to you'll. Have some tools in there to present, perfect back and sort of review with them. There's. Gonna be some cost benefit ROI related.

JENN

1:03:17 Yes.

BROOKE

1:03:19 Yeah.

JENN

1:03:20 Okay. Perfect. Well, thank you so so much for all of your time today. I really.

BROOKE

1:03:24 I appreciate it. Yeah.

JENN

1:03:26 Took a lotta notes. So, we're good.

BROOKE

1:03:29 Barriers as well. And good luck on your other meetings. I look forward to speaking to you again next week. Perfect. Thank you.

JENN

1:03:35 So much. Have a good.

BROOKE

1:03:36 Day. Have a good day too. Bye.

JENN

1:03:37 Bye.

The End