# ServiceTrade Demo with DICKS REFRIGERATION

Susan Warren with DICKS REFRIGERATION
Recorded on 4/12/23 via Zoom, 1 hour 21 min.

# Participants

### SERVICETRADE

Susan Warren
*Territory Manager*

Owen Grimme
*SDR*

## DICKS REFRIGERATION

Todd Fenneman
*Office Manager*

## OTHER

18473616516

# Topics

# Transcript

### SUSAN

0:00 Hi, Todd. It says that it looks like it's still connecting to audio for you. I wasn't sure if you could hear me. You wanted to respond in the chat for that, not sure if it's needed, but I'll go ahead and drop just in case a dial in number, if that would be easier for you. Wait, I see here we are hello.

### 18473616516

0:22 Hello, Susan. How are you?

### SUSAN

0:24 Good. I'm good. Thanks for hopping on. I was pulling up the call in number and you were a step ahead of me. So it was perfect.

### 18473616516

0:35 Yeah, we're a technology. We don't have a camera on our desktop. So, each.

### SUSAN

0:42 Totally fine. Whenever someone doesn't have a camera, I just assume George clooney with a refrigeration background. So it is totally fine.

### 18473616516

0:51 You've got me. You got me a.

### SUSAN

0:54 How did I know anyway? Thanks for having on today. Anybody else joining us?

### 18473616516

1:04 No, it's just myself.

### SUSAN

1:06 Happy to have you basically the game plan for today. If it sounds good to you wanna spend the first few minutes learning about your business, your goals, what you're hoping to accomplish with a tool like service trade.

*--- Purchase decision ---*

SUSAN

1:18 And then I want to share a little bit about the folks that see the most value out of service trade and then want to spend the bulk of the time actually showing you around, going through the workflows, just having a conversation about that. And if you're liking what you're seeing, we can talk next steps at the end. How's that sign?

*--- Purchase decision ends ---*

18473616516

1:35 Sounds fine.

SUSAN

1:36 Awesome. And I know we blocked an hour on the calendar for you, but do you have any hard stops either at the hour or prior to the hour that I should be cognizant of?

18473616516

1:47 Currently, no, not right now. No 10.

SUSAN

1:53 Very good. Well, first off, you know, I was looking through some notes here. It looks like you had kinda checked us out, maybe about seven Ish months ago. We, we'd love to know what's bringing you back to check out service trade. Again. What's kind of prompting the joining of this meeting today? Other than my friend and colleague, Owens, charming. Demeanor.

18473616516

2:17 Yeah.

*--- Paper process ---*

18473616516

2:18 Other than just in terms of our service tickets for maybe our smaller clients, we do a lot of stuff with walmart would men all these, which is fine. They have on little setup going, yeah, and how we build them and everything. It's just a smaller clients tell maybe that we need to get a better idea with tickets, just work orders instead of just paper tickets and get something a little more electronic gotcha from work order to invoicing.

*--- Accounting integrations ---*

SUSAN

2:46 So, just to be clear, is this something that you would solely use for your? And of course, you know, this could change as you can take a deeper look at it, but are you thinking initially, this is something you would solely be using for folks that are not a service channel user or would you want to use parts and pieces of this like scheduling

or perhaps other components aren't available in service channel? Would you wanna also potentially use it for parts of service channel customers?

### 18473616516

3:19 Yeah. I think initially just the smaller customers and eventually if we can implement it in other ways absolutely to just have one source to go to and then just to get to where we need to be.

### SUSAN

3:35 Yeah, because I was doing some digging in advance. It looks like we are really developing an integration that's possible for service channel so that double data entry wouldn't necessarily have to be happening or I guess copy and pasting hypothetically if you will.

*--- Accounting integrations ends ---*

### SUSAN

3:53 So just know that that's a possibility. Of course, you know, that does anytime you do anything involving, you know, custom software development that, you know, does come at an additional cost but it's you know, that's definitely something that we could potentially grow into if you're like in the workflows for the non service channel customers.

*--- Type of work ---*

### SUSAN

4:09 So just wanted to hit on that kinda from the top but kind of Zoom out a little bit bigger picture. What's your official role there?

### 18473616516

4:22 Project manager?

### SUSAN

4:26 Very good. And then, you know, thinking about the folks who would want to be using a tool like this out in the field for, you know, editing work orders for plan, maintenance, for repairs... for lighter installs. How many folks in the field do you think would need to use a tool like this?

### 18473616516

4:49 I think currently right now probably out seven to start with.

### SUSAN

4:55 Sounds good. And, you know, looking through the notes as well, obviously, as the name implies, you know, refrigeration, but are there any other services that you guys are providing for your customers that they're you know, kind a part of the bread and butter, if you will.

18473616516

5:14 No refrigeration, most, we do some hvac here and there, and then some ems more for just monitor of refrigeration but refrigeration... are base thing. 90 percent of that is refrigeration, right?

SUSAN

5:31 Makes sense. And tell me a little bit about your customers. What kinds of industries are they in?

18473616516

5:39 Primarily grocery. So you will have some small gas station, small convenience stores, some people that do, you know, just cheese and meat sticks... to even just freeze drying type of stuff for dogs to be honest with you?

SUSAN

6:02 Makes sense.

18473616516

6:04 Mostly in the grocery market.

SUSAN

6:06 Yeah. I was resisting making it questioning if you had a lot of cheese customers in Wisconsin because I felt like that joke was too low hanging for. So, thank you for.

*--- Type of work ---*

18473616516

6:18 Right away sticks cheese.

SUSAN

6:21 I, okay. I can, I've made the comment. I can move on. I talk about the product. Well, very good. And, you know, thinking about job volume, what percentage would you say is install? And what percentage would you class as service?

18473616516

6:45 I would go probably 75 percent installed, 25 percent service more.

SUSAN

6:51 Five percent install and then thinking about the bucket that's just service, what percentage is proactive? What percentage would you say is reactive? So like plan maintenance and inspection versus repairs?

7:09 Yeah. From the PM side, it's probably about the 20 percent. Yeah, just receiving calls daily on issues.

SUSAN

7:21 It's about 80 percent reactive.

*--- Accounting integrations ---*

SUSAN

7:24 Okay. So tell me a little bit about how you guys are doing things. Now. I was looking through the notes seeing pen and paper and then looks like a little bit of an upheaval when it comes to all things accounting, but kind to jump into that directly. Like is there a plan to move off of Sage? Are we sticking with Sage for accounting? What, what's the game plan with that?

18473616516

7:50 Yeah. I guess where we have to go, I suppose to go with where we want to be. I know a lot of a... lot of stuff requires a little higher grade of what we have currently... to use, integrate... easier download, give us a little more opportunity for what we got going on. But that was something we would... have talked about and maybe we have to implement before we move into a service channel product or a service trade product.

SUSAN

8:28 Yeah. And we'll say there, we, you know, not to be too contradictory but we do have a lot of folks that and it really depends on the volume of invoices that you're sending and you would want to take from service trade and put into an accounting system. A lot of folks actually don't even have the accounting integration built in because they're using something super random that doesn't have an integration capability. But for whatever reason, they need to stay with that. So, you know, how many invoices you know, do you think would be created in a tool like service trade right now? Like per month, just roughly.

*--- Accounting integrations ends ---*

SUSAN

9:18 You say less than 50, more than 100?

SUSAN

9:26 Yeah. In that case, I can certainly see the value of wanting to jump in with an integration. The one now we can integrate with Sage products. We have a person who's is on our integrations team that came from the world of selling Sage products.

*--- Accounting integrations ---*

SUSAN

<sub>9:40</sub> And it's totally possible. Now when it comes to, you know, kind of thinking that through, you know, obviously those are custom integrations and they come an additional cost if you were to move to Quickbooks, either online or desktop, that's a seamless integration available at no additional cost. So that's just kinda something to keep in the back of the mind. But moving away, you know, from accounting, you know, like when it comes to scheduling and dispatching, like what tools are you using to communicate to the guys when they need to be aware?

<div align="center">18473616516</div>

<sub>10:18</sub> It'll very, you know, we've gotten to a point where a lot of the calls come through on an email system through our own... dedicated like web address.

<div align="center">--- *Accounting integrations ends* ---</div>

<div align="center">18473616516</div>

<sub>10:30</sub> We'll get a lot of those or we'll get stuff either through. We still get stuff through phone calls... here. And there we'll kinda service man come in the morning, kinda sort those out... direct those to a few guys and kinda head out for the day. If we get something through the day through emergency call, either through email phone call, we may redirect, maybe have to pull a guy off the site, you know, had the had them somewhere else. Same thing with the PM. It's nice to have a guy out. We start a PM like to keep them there for the eight hours for that day at least and then just kinda move them around. But that's essentially the thing we, you know, we, whatever we get in maybe later today or early in the morning, we'll sit down, sort them out, direct them on who's taking what. And then we'll go from there.

<div align="center">SUSAN</div>

<sub>11:22</sub> That makes sense. So, I'm here in email call, text, physical paper, that kind of encompass.

<div align="center">18473616516</div>

<sub>11:34</sub> Yeah, pretty much a little bit of everything right now. So.

<div align="center">SUSAN</div>

<sub>11:39</sub> So, let's say, you know, talking about a PM job, let's say someone while they're out there on one of those, they discover something and feel free to grab any phone calls you need to. They're out.

<div align="center">18473616516</div>

<sub>11:51</sub> No, I'm good right now.

<div align="center">--- *Deficiencies* ---</div>

<div align="center">SUSAN</div>

<sub>11:51</sub> Okay. Sweet just let me know. But yeah. So when let's say someone's out on a plan maintenance visit and, you know, they open up the equipment that they're servicing and realize something severely broken inside and they need to report that

information back to the office. So it could be quoted out. How is that being done right now?

*--- Deficiencies ends ---*

18473616516

12:15 It depends on who we're recording it out to some. Have we'll have to come back into the office to, not to exceed on our product, send that in or we may just that may come into the thing I might do some re, might handed off to me, do some research, get some pricing on a few things. We'll put something together as quick as we can and just get it together. Get them a price and then get a written okay whether to proceed or not.

SUSAN

12:42 OSHA. And are the quotes that you're sending out? Are those like PDF that are attached to an email generally or how they receive those?

*--- Paper process ---*

18473616516

12:53 Yeah. Well, normally put, yeah, put it on a word file, put them to a PDF and either send them to them email wise... or through service channel, if it is a walmart store.

SUSAN

13:08 That makes sense. Well, you know, kind of thinking through all that and, you know, all the different tools that you're using, you know, with, you know, paper, the calls, the emails, like what are some bottlenecks that you guys are experiencing with your current process or what are some things that you're hoping to improve?

18473616516

13:29 Yeah. I think from the ticket input or, you know, having multiple tests, they might start a ticket, get passed off to another guy. You know, there's things that get missed. I think just from the time standpoint, travel organizational, sometimes you guys will sit down maybe at the end of the week, review their tickets, put it completed together, not, you know, in real time like maybe they should. So stuff that gets missed pricing issues, items get left off with tickets. Possibly, you know, it gets josled around a little bit. It'd be nice to get, it may be priced up... a little sooner or have something... that's like input it immediately from where they're sitting and not waiting five days to fill out a ticket work order and get it invoicing.

SUSAN

14:33 Yeah. So what I'm hearing you say is sometimes information goes missing either, you know, because of the nature of paper or the time delay, you know, sometimes items are missing from those things and, you know, with those delays, you know, information about pricing is not getting out as fast or as well organized as you would like.

SUSAN

14:53 You know, thinking about that. Seems like that could certainly be eating up a lot of time and creating a lot of missed revenue opportunities. Would you agree?

18473616516

15:02 Correct.

SUSAN

15:05 Very good. So, what other kinds of tools besides service trade, have you checked that recently?

18473616516

15:12 I...

18473616516

15:17 Think, is it BuildOps... recently a couple of weeks ago? I know there's somebody else that we industry, I had just recently started using them... but that, that's another tool. You know, we, there's like see what's out there, get one or one to three kind of quotes on what's going on or what they offer and before we proceed.

SUSAN

15:46 Absolutely. And, you know, just overall whether it's from BuildOps or just other places you've checked out in the past. What are some things that you've noticed that are gotta have that you've seen out there? And what are some perhaps can't stands from tools that you've checked out?

18473616516

16:05 I think just from the input of the tickets with the ability to... have a pricing database on hand right away that we can pull from there that's updated and just can be answered automatically. And I think just getting the ticket from initial start to an invoice point and just be done with it and just move it along. I don't know the GPS features. I don't know if that's... something necessarily we really need in terms of rerouting or directing our guys, it is nice just to have a time feature on there for them to clarify. So if they do have to go back, hey, I was here, you know, to overlap. I was here.

*--- Tech time tracking ---*

18473616516

16:50 It took me two hours to get to this job. So they're not maybe overcharging or under charging... from the travel end and just making tickets look incorrect. You hate to have a customer call you back and say, hey, what are you charging me for a four hours worth of travel? You're here for an hour and I only 45 minutes from your shop.

Yeah. So just something to double check or just something that's a little more efficient and correct travel?

SUSAN

17:20 Absolutely. No. Let's say, hypothetically, I show you around today and hypothetically I just knock your socks off.

*--- Purchase decision ---*

SUSAN

17:30 You know, like this is exactly what we're looking for. The value far outweighs the price. I am a huge fan. Let's go. What would happen next on your end? Who else would, you know, need to be involved in this or, you know, kinda have a say in whether or not you move forward?

*--- Purchase decision ends ---*

18473616516

17:48 Yeah, the president, the service manager... that kind of sets up all the service stuff, and then the, our accounting person.

SUSAN

18:00 Can I get?

18473616516

18:01 A few people?

SUSAN

18:04 Absolutely. I can get first names on those folks just so I don't get disorganized later.

18473616516

18:10 The president is mark Stewart.

18473616516

18:18 You got the service manager will be Corey Wagner.

SUSAN

18:25 And the accountant?

18473616516

18:27 Then billing would be a Betty Redman.

18473616516

18:37 And thinking...

SUSAN

18:37 About them, what's important to them in a tool like this where some of their kind of big pieces they gotta have.

18473616516

18:47 I think that's a little bit for all of us just, you know, just... getting tickets. So we're not following up constantly on certain issues. Things are, you know, things are getting missed.

18473616516

19:01 A checking. I have pricing for this. So we get a receipt, you know... like that. I know some of the tools have shown like taking pictures of stuff and just getting signatures. I know we were running into or we had to get signatures and everything. It kinda went away for COVID that, you know, you don't wanna touching somebody iPad and the whole scenario.

18473616516

19:25 And now that's kinda come back to where we have to have signatures on or work orders for certain customers for that to validate or post the invoicing through a little quicker. Otherwise we got to go back and I'll sit for a while and... it's more just a small stuff to just get a little better organized... and complete. Instead of having your tickets 70 percent complete. It'd be nice to have 9,500 percent complete.

SUSAN

19:55 Yeah. So increase... completion rates?

18473616516

20:04 Correct.

SUSAN

20:04 Absolutely. And you talked about pricing, are you talking about the ability to easily, you know, have like a, you know, well, I'll just tell you how service rate does it. And you tell me this is how you like it. But basically, so you have your database of commonly used parts and labor that can be done individually or bulk uploaded and

that's just a title, a description and a cost and that can be updated through bulk actions or through individually.

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

### SUSAN

20:38 And then with pricing, we have pricing contracts that's where we have rules in place. You know, certain items always cost as much or everything. It gets a certain percentage markup across the board, mark up as dependent on type or mark up as dependent on cost. And there's different tiers.

--- *Parts management (inventory)* ---

### SUSAN

20:58 But I do wanna stress that ServiceTrade is not designed to be the kind of tool that's going to have some sort of database from like other like parts vendors nationally with, you know, different, you know, that's constantly being updated in the back end. Is that something that you're looking for? And if so, is that a gotta have?

### 18473616516

21:21 You know, parts used to move fairly slow once upon a time, you know, get their old paper back saying once a month and you updated in a binder. I know pricing has become a little more volatile just especially in just in copper. But then again, it's not worst case scenarios.

--- *Quote templates* ---

### 18473616516

21:42 You know, it's never going to go up that much in a month. So, as long as it's fairly updated where we can just go actually item that we most commonly use, there's 50 100 parts the service guys normally use and just put it into place real quick and just price it up and just, and be done with it.

--- *Accounting integrations* ---

### SUSAN

22:02 That's exactly what we can help with that. I just want to be sure because like there's no third party information like, you know, some I've heard of like there, there's kind of other tools that aren't necessarily like service trade, but, you know, have some database of like the top 100 vendors in North America and you can get pricing information from them and it automatically pulls in and that kind of thing like that's not how it's set up.

--- *Purchase decision* ---

### SUSAN

22:24 So I just wanna make sure you're cool with that. Has anybody talked budget? Is there kind of a not to exceed amount when it comes to a tool like this?

18473616516

22:38 I think it's all based on like needs and what our deficiencies are, and where, you know, if it's cost effective, you know, time is always money and we're spending a lot of time just trying to get things correct or missing a lot of things where we can easily make up that budget. And it makes sense. Yeah, we would go forward.

SUSAN

23:02 Perfect. And in a perfect world, when would you be ready to move forward with a tool like this? Are we thinking in the next few weeks, the next few months? What, what's the ideal time line? Given the fact that you?

18473616516

23:20 Yeah, probably it would probably be in the next few months.

*--- Purchase decision ends ---*

18473616516

23:24 We're just kinda getting through the tax season and everything kind of figuring out where we're at what we need to maybe... have or need to spend for next year. And it's always nice to get a little beforehand. I mean, we try to especially with other items. I mean, you know, we've tried to order vehicles like two years ago, we're still waiting for that.

*--- Purchase decision ---*

18473616516

23:42 So we'll always have a need to spend money at certain points obviously to get there. But tech stuff is always, yeah, I can take it in a second here, but yeah, that's always something. It'd probably be a couple of months to. So we get settled in with stuff, sit down and discuss, figure out where we're headed and go from there.

*--- Purchase decision ends ---*

SUSAN

24:06 Absolutely. Well, any other kind of big picture questions before I share a little bit about service trade?

18473616516

24:16 No, I think we're good right now. Can I take a call real quick and get back?

SUSAN

24:19 Please do. Absolutely. Yeah. Okay.

24:22  Bye bye.

26:31  Who's Anne? Welcome back. Can you hear me? Okay? Yeah. Bye.

SUSAN

26:39  Well, awesome. Well, let's go ahead and jump in and like I said...

26:43  I definitely want.

SUSAN

26:43  This to be a conversation. You're never interrupting me. You see something interesting or you have a question, do not hesitate. Alright. So you should see my screen should see a work order on there.

*--- Assets ---*

SUSAN

26:59  This is a work order and service trade. Whenever you hear job think work order from the jump, you can see how we are specifically designed with commercial in mind. So here everything is organized. You're doing everything to assets when you hear assets think equipment... this piece of equipment, this... compressor system, this compressor rack lives at the crispy cream and night Dale.

*--- Recurring maintenance ---*

SUSAN

27:29  The crispy cream in night Dale is one of five is locations that roll up into a crispy cream corporate. So that way you can keep everything organized properly and you can have different contacts for the company as a as to location and be sending whatever communication to whoever you like from there down here, we have got our appointment date and time and which technician is going to. You can have multiple technicians on that. Then down here, you can have your detailed description of what actually needs to be performed on this. These work orders are extremely flexible. So you can have multiple appointments on a work order. And then within appointments, you can have multiple assets being serviced.

*--- Assets ---*

SUSAN

28:14  So for simplicity sake, we've got a single appointment with a single service on a single asset. But for your installs, you can have, you know, for example, let's say it's gonna take a total of four visits to get out there. You can have all four different

phases with different descriptions or the same description with four different appointments on there.

*--- Quote templates ---*

SUSAN

28:34 It's an extremely flexible work order system. The other piece of this is, you know, a lot of times folks wind up doing stuff that is basically the same thing over and over again with minor tweaks, and to prevent folks from having to retype the same thing over and over again. We have service templates for that. So, you know, 80 percent of it is gonna basically stay the same. You probably want to create a service template for that type of job. And that will include this description. And then when you go down here, it will include your commonly used parts and labor. And then of course, you can click on the pencil to make any adjustments to that as you like... there, there's our parts and labor as well. And then down here, this is the asset that will be servicing. Again. If there were multiple assets on this, that would all appear here and then both from the field as well as from the office.

*--- Assets ---*

SUSAN

29:30 You'll be able to access all asset history. I, so that we're reducing phone calls back and forth the office because everyone can always see previous work orders, previous quoting opportunities. Diagnostic guides, manuals, diagrams, etcetera that's always going to be accessible. I'm wondering if that, if that's something that's kinda eaten up a chunk of your time sometimes considering folks wouldn't have access to asset history in the field.

*--- Assets ends ---*

18473616516

29:59 Yeah. At times I think it's more from a one more standpoint to, I don't know if they started got start monitoring their own stuff for say on how they do stuff, but it is nice to say, hey, I go work on a part. This is where we kinda left off. We replace this six months later. It's got the me, a similar issue and you can say, hey... this part was replaced. Maybe we need to look somewhere else.

SUSAN

30:31 Definitely. So that's the asset, all these other pieces I'll be covering as we go on through out. But can I overall thoughts about the work order as a whole? Is this something that, that's making sense? And you feel like the office folks would enjoy interacting with?

*--- Access to information ---*

18473616516

30:51 Yeah, it seems fairly simple just as you get to work order, you got your location, everything gets built to what's going on, what the call is about. Yeah.

SUSAN

31:02 Good. Well, let's take a look at it from the technicians perspective. So I'll go ahead and share my screen on my phone. So service trade can be used from the technicians perspective. Anything that runs iOS or android. It's totally fine. Alright. So there we go. I want to share the screen... there we are. So this is what it looks like when you log in for the day and ServiceTrade is the technician.

*--- Access to information ends ---*

SUSAN

31:38 We've got our appointment here. This 245. This is just displaying all the appointments we have for today. Of course, you can change that view to everything coming up scheduled. And of course, you can access completed appointments as well. So we can go in here and click on this particular job.

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

SUSAN

31:55 And then down here, we can go over and swipe across to indicate that we are going to be driving to this crispy screen. So we'll go ahead and clock in as being in route and then a little extra layer of communication you can do for your customers. You can click notify customer and email them and let them know based on the GPS, what time you're expecting to arrive. Let's say GPS is showing, you know, 250. So go ahead and send that quick email out. Is that something that some of your folks might find valuable that little email introduction with a, with an arrival time?

18473616516

32:35 Yeah, just a heads up in case I gotta pull a case or whatever they could say, hey, we're going to be there in an hour.

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

18473616516

32:40 That way they have to get ball frazzled and say, hey, I gotta pull a case is running too warm. I can probably leave it there, monitor and keep the doors closed and so on be here, hopefully get figure it out. Yeah.

SUSAN

32:52 Absolutely. Yeah. It's kinda like that Amazon like experience of like, hey, I know I have a good understanding of what's going on with my relationship with this vendor.

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

SUSAN

33:03 So we'll pretend like this is the world shortest commute to this crispy cream and we are now arriving on site. So we're gonna clock out of being in route and clock in as

being on site. Again, GPS and time stamps are being taken and you can, this would be separate for each technician that is clocking in and out of this job.

*--- Access to information ---*

SUSAN

33:28 So from here, we're going to go ahead and review what needs to get done. And back on the screen, it's going to be that same information that was in the office V, but now in a mobile friendly format. So first thing is what are we expected to do here?

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

SUSAN

33:38 As I mentioned, if there were multiple services to multiple assets, they would all appear here, but we're just going to review that same checklist. We just saw this is everything that we need to do. And once we've reviewed that, we need to know what are we doing this too?

*--- Assets ---*

SUSAN

33:55 So we can go over to assets. And then from here, just like you can, in the office, you can click on the asset and access service history, you know, with all the previous work orders, any quoting opportunities that have been reported. And then of course, the files and photos, you know, if you want to have a manual there, diagram, etcetera. All of that is accessible from here. Of course, you can also put in demographic information like, you know, make model etcetera. The other cool piece here is that if anybody has any questions about a piece of equipment that isn't part of this work order, no big deal, they can head over to all. And that's going to show you every single asset that is at that location and you can pull up the same information there.

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

SUSAN

34:50 We complete the job, we'll head over to job items to see parts in labor. And this is going to be the same items that we just saw back in the office view. But if I need to add on another piece, realize, hey, I need a widget to complete this job.

*--- Quote templates ---*

SUSAN

35:05 I can click this plus button and I can select from your list of commonly used parts and labor that we talked about being updated in the back end. And then if there's something that we've never used before, of course, you can key that in manually there. But the thing that really helps keep up with parts is down here when you indicate source.

*--- Parts management (inventory) ---*

SUSAN

35:26 So if it's something that's coming from truck stock, they would want to put it in as coming from technician. That way you can on a report, however often you like to make sure that you know, what's been consumed from truck stock and what needs to be replenished. If it's something that needs to be purchased from a vendor, they can select that.

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

SUSAN

35:43 And then it's going to have your list of vendors down here. And then you can indicate on the status whether it was something that they were able to, you know, go and purchase directly on site. Therefore it was delivered in a big deal. If it's something they went ahead and ordered. And therefore we need to reschedule for when it is received or is it something that we just know that we need it and we need the office or someone else to order it. So we could put not yet ordered there? Okay? Would this be helpful in keeping up with parts?

*--- Deficiencies ---*

18473616516

36:13 Yeah.

SUSAN

36:15 Okay, good. So we've got everything we need to do the job. And so we open this guy up and... we realize that... this compressor a, has a barking compressor in it. So we'll head over to deficiencies clicking there. And this is gonna show us every single deficiency that's been reported. If we want to add a new one, we can just click that plus button and we're just gonna ask us for a description. So in this case, we'll say been compressor... and they can put in whatever they like there. And since it's you know, over a mobile device, you have the ability to voice detects, of course, so we can click next.

*--- Customer engagement ---*

SUSAN

37:00 And we found that the sweet spot for getting quotes approved is four to five pictures. And also a little fun fact folks that utilize service trade to its full capabilities, see about a 23 percent increase in repair revenue through this process that we're walking through right now.

*--- Deficiencies ---*

SUSAN

37:16 So just the ability to quickly add this information from the field, whether it's from a plan, maintenance visit or any other type of visit while they're out there. So we'll click plus on this and we'll pretend like my microphone is our broken compressor. I want bore you to four or five shots of that. But you certainly get the idea. And then another thing that helps with speed in the field is the ability to do audio me... thing that we're talking about. And, you know, we don't want to detect wasting a bunch of time typing it on their phone so they can just record an audio.

*--- Deficiencies ends ---*

SUSAN

37:55 And then I like this, it will come back. And then the off, I can listen to that and put in whatever key information they like. So we add that in, of course, video and documents are possible here as well. And this is always the point where I like to remind folks that any sluggishness and screen switching is coming from Zoom.

*--- Deficiencies ---*

SUSAN

38:13 I promise that is not a service straight issue. But so we've added our attachments and it's just gonna ask us how bad is it that's making the everything inoperable? And we're gonna tie it back to that particular asset. And it's gonna automatically find the service line that we have it under. And then this is a new deficiency. And if folks want to, they can not require, they can add a proposed solution in this case where we're saying this should be replaced. So in just that short of my time, the technician has done everything they need to do you to instantly get that information back to the office so that can be reviewed and a quote can be sent out. So. We'll head back over to the office. So we're back over here and that's going to generate an email to whoever you have it set up for in the office to receive notification of this deficiency. And that email is going to take them to this page. This is our deficiency page.

*--- Access to information ---*

SUSAN

39:16 Also, it's important to point out that workflow we just did in the mobile app. You can do that same workflow from the office. So if someone calls you up and says, hey, I need XYZ work performed, you can, you know, use this workflow to create a quoting opportunity from the offices perspective and then turn that into a quote.

*--- Deficiencies ---*

SUSAN

39:34 There's no requirement... for quotes originate from the field. Just kinda quick fyi about that. So we're just gonna review this information. So let's say, you know, we listen to this audio memo and we've added in whatever information we want from it. So we can go ahead and delete that at because that's not something we want the customer to hear... but we're going to keep our pictures in video, of course, that's all looking good.

SUSAN

40:03 And let's say that replacing a compressor is something that we do pretty often. So just like the service template, we also would want to be creating quote templates for commonly performed work. So here we're going to go ahead and create the quote, always look to put a due date on it. So that quote is pretty bare bones right at the moment. It's just carried over the information that we've keyed in. So this is the place where we're going to apply that quote template.

SUSAN

40:36 That's gonna have a description as well as commonly used parts and labor. You can make small tweaks to that with the pencil icon there.

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

SUSAN

40:46 And you can also go in and display change the way that this is displayed to the end customer. So if they prefer, lions price is great. But there's also the opportunity to do a grand total only as well as all these other options. Every time we send a quote or an invoice in service trade internally, only you're always going to be able to see the margins on this.

*--- Quote templates ---*

SUSAN

41:13 So in this case, this is something that if it goes out as is and gets approved, will offer us 36 point seven percent margin. And then our prices are being generated from this pricing contract. So all this is looking good to us. We can go ahead and click save and get this on over to the customer.

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

SUSAN

41:34 So when we click that, it's going to send this picture over. And then here we've got all the different ability to select from all these folks either at the company or the, this particular location to receive this quote. So I'll select that. And then if you need that extra layer of accountability for some of your customers, you can require a po number in order for them to approve the quote.

SUSAN

42:04 So let me show you what a quote looks like. So this is what your in customers gonna see when they click on the link from the email, this is a quote and ServiceTrade. It's got your brand, front and center, the description and the parts are continued over and displayed the way that you like. But perhaps the most important section is down here under files and photos that's gonna just show how severe this issue is and make the quote be more likely to be approved. So they're gonna just review that. They can click on that and see it in live living color, no compression. And

go ahead and click that green approved button since they see the value in that. What do you think your folks will think about getting a quote like this?

18473616516

42:52 Yeah. You know, pictures are worth a 1,000 words, a lot of time. So they see that. And it looks professional.

--- *Deficiencies* ---

18473616516

42:58 What's being done? A little more descriptive, not just saying, hey, blah, blah blah compressor, two things labor material cost. Yes or no. It's a little more thorough.

SUSAN

43:15 Good. So let's say they see my, gosh, that compressor is fully russet out absolutely needs to get replaced. Let's go ahead and click the approved button.

--- *Quoting* ---

SUSAN

43:25 So they did that. And I'm just manually doing that on my end. So an email would be triggered once they click that button saying, hey, this has been approved. But before we get into what happens next, I do just want to briefly touch on a bit of reporting. There's much more to that in service trade. But some of the key reporting things as it relates to this is for quotes, what a lot of our customers like to do is run work for example, weekly on all quotes that are coming up due soon or are just recently passed you. So you can run that report and run reports based on any of these parameters seen up here. And then from there, you can select whichever ones need to have that little push and send a friendly message saying, hey, please review this or, hey, please pay that because the same searching functions and reporting functions are available for invoices as well.

--- *Paper process* ---

SUSAN

44:20 So that's how our customers use service trade to make sure quotes aren't falling through the cracks and invoices are being paid in a timely way. Is that something you think might be helpful?

18473616516

44:31 Yeah. And would that also tell you if like a work order is still may be open?

--- *Dispatch* ---

SUSAN

<sub>44:37</sub> So...

<sub>44:37</sub> Now, you...

SUSAN

<sub>44:40</sub> Yeah. So not on that screen. I'll show you at the end where you can see semi completed work orders or uncompleted appointments. Basically... good call out on that. And then the other piece while we're talking about reporting, I do wanna show is our tech scorecard.

*--- Tech time tracking ---*

SUSAN

<sub>45:03</sub> So this is this easy way you can see how much time techs are spending on each type of clock event for whatever period of time you want to set it as. And then you can also see how well they're showing up for appointments and the volume of appointments, and perhaps most importantly how much revenue each technician is bringing in... that's that.

*--- Quote templates ---*

SUSAN

<sub>45:28</sub> So we've got this quote approved. But now we need to turn this into actual work so we can do it and then get paid. So to do that is super simple. You can either create a job from the quote brand new or you can add all of this to the existing job. Either way, the only action that's required is making sure that it's scheduled properly on the correct technician. So for example, now this quote is approved, I want to create a brand new job from it. All that I have to do is put in a due date... and then create a job from this quote... and the full work order is completely flushed out.

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

SUSAN

<sub>46:14</sub> And the only action required is to schedule the appointment and select the technician. Do you think that might save a bit of time? Yes. So we did all that, but we've still left our technician out there in the field and they've got to finish the job. So let's head back over there.

*--- Deficiencies ---*

SUSAN

<sub>46:44</sub> So we record our efficiency... and we've reviewed everything that needs to get done. We've done all that now, let's get an onsite signature. So, but before that just really briefly, I do want to show you how easy it is to do for example, like a before and after picture or capture any type of media that relates to the job itself as opposed to, you know, the deficiency. So you just head over to attachments and then click on

job and you can attach all. I'll do a little photo here of my random chin pans, astronaut statue. And of course you have those same file options that are there. And of course, you can attach descriptions to each of those as well.

*--- Assets ---*

SUSAN

47:31 So all that's gonna come over. And then the technicians can also add comments if they want to the, you know, let's say cool level with or what have you. They can attach comments here... and let's put in a sample and they can select who can see that from here.

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

SUSAN

47:52 So we got all the information in place and we've completed everything. And now it's time to get that signature. So we go ahead and create work acknowledgement... and we click on that. It's gonna have all the information we just saw. So you're basically standing next to the person that will be doing that.

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

SUSAN

48:09 And then we go over to on act and you would just select the person that's going to be performing the signature. So you don't have to re, key that in later and then click done. They will review all that with them. They'll toggle on your TS and CS... and then from there, they can just click confirm and sign.

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

SUSAN

48:32 Their name is already be in there and they just do a quick finger signature... and that is going to be sent to them directly. And it's now attached to the work order. Any other questions about the mobile app before we clock out and head back to create an invoice?

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

18473616516

48:54 No, how good is the speak to text is pretty accurate?

SUSAN

49:00 So, so the speech to text is going to, it technically gets run through your operating system because it's tied.

18473616516

49:08 The...

SUSAN

49:08 Keyboard that's used. So we don't really have a strong hand in that. But even with, as you hear my, I know this is gonna come as a huge surprise. I'm actually from the south. So even with math, I do.

--- *Paper process* ---

18473616516

49:29 Yeah, because guys are obviously the best don't have the best handwriting... or spelling. So it's hard to translate what they're saying or doing... and I know they're not the greatest typer either speed wise, especially when you're working off of an iPad or your phone. It's hard to... take that. Yeah.

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

SUSAN

50:00 Would recommend that combination of voice attacks and those audio memos we're talking about as well. Okay. Yeah. So we, we've got our sign off and we can go ahead and clock out because we've done everything we need to do and this is going to be an extra layer of accountability for the technician because all the services that are on this appointment will appear here with a check mark beside it. And so then checking that off. If something gets missing like, well, why don't you check this off? You didn't do all these things. So from there, we can go ahead and click next. If this is something where there was an emergency that came up or they needed a part that they didn't have. So they weren't able to complete it, they would put it as no. And I'll show you where that pops up. Later. We did have everything we needed and we're able to complete it. So we can go ahead and mark, yes. And so from there, we can go ahead and finish clocking out and let's head back to the office and get paid for this.

SUSAN

51:04 So we're back here. Let me just go ahead and click refresh real fast. And so you'll notice that was the job I just created. There we go. So we're back in the office and this is now changed from scheduled to completed. So it's our job now to just review the information that the technician put in. So we can go down here, see if any parts got added, if anything needs to be ordered... and just fyi, if they had not marked it complete, it would still say scheduled, but their clock events would still come over. So when we go down here, we can see our clock events. So we know how long they were in route and how long they were on site. And it's also given us a little bit of warning with this little danger in saying, hey, Susan said she was on site but actually she was 35 Miles away. So what's going on with that? And then the deficiency has come through... down here and our comment as well. And then you can change whether or not that is something that's visible. And then the attachments, we got our picture and we got our work authorization signature. So that's all looking good to us. So from here, we can go ahead and mark the job as complete and send an invoice.

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

SUSAN

52:25 But however if you just want to, you know, send a recap of what was done without sending the invoice. You can just send the service link and I'll show you what that looks like because that's also on the invoice. So we'll mark this complete and create an invoice. It's gonna ask us to review the parts and labor. Yep, that's what we wanted to build for.

--- *Quote templates* ---

SUSAN

52:51 And so here we've got our invoice template here. You can make changes by clicking on the pencil. You can add in descriptions, add in any sort of comments that you would like for this particular invoice that would come through. So you can change that to everyone or just internal.

--- *Invoicing* ---

SUSAN

53:10 So we've reviewed that. We can go ahead and if you had accounting integration setup or if you're using Quickbooks, you can send it to the accounting system. But we usually recommend invoicing from service trade because when we click on this invoice link, let me show you what an invoice looks like in service trade.

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

SUSAN

53:30 So pretty standard stuff on this guy. You got your brand front and center, you know, obviously the description parts and labor, but the real differentiator is in here in the go to service details. So here is going to have all of this info. But then you've also got your work acknowledgement, any pictures, video, whatever you want folks to see. And then you can also see that we went the extra mile and reported an efficiency while we're out there. What do you think folks would think about the service link and the invoice?

18473616516

54:09 Yeah. I think that's just a little more throw so and then actually, you know, what they're paid for and... it lessens a lot of questions after the fact.

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

SUSAN

54:20 Yeah, because I'm thinking a lot of the questions that you're getting would probably be addressed by the information that's here and that will probably help things get paid a little bit faster.

18473616516

54:31 What did you do exactly review of what was done? And right? Are, you know, doing what even from a PM standpoint? Or did you... check everything off that was

supposed to be done? And, yes.

SUSAN

54:48 Absolutely. So we've done invoicing. Let me show you really briefly what scheduling looks like. So we go back over here. We have two ways of scheduling. One is better suited for stuff that, you know, about well in advance, and the other is more for emergency repair calls. So for stuff that we're scheduling out in advance, we recommend using our map based scheduler. So basically, whenever a job is set up and is due for, in this case, we're looking at the month of April, it's gonna show up here. So you see all these gray dots, that means that we do not have a technician nor do we have a time selected for these. We just know that we need to get out there and perform that work. So if I were to take the, this gray dot and then drag it over to Shelby, it would be assigned to her. And then the dot would change to her color, which is that Bright blue. And you can kinda see that there. And some of these where this has been assigned to Sean, and I believe some other folks. And you can see that calendar icon, which means that a date and time has been selected. You can see that same thing here with those guys there. And so if we would drag it over, it would change the color. And then if we dragged it down to where we wanted it on the schedule, it would then have a little calendar icon. And then from there, you can adjust times as need be to make sure that everyone's doing appointments that are making sense geographically in advance. And then when it comes to scheduling for more reactive work... we'd wanna use our dispatch and board and this is gonna show us everything that's already on the schedule. We go down here. We can see... here, you know, this is that appointment that we worked here. Are the clock, events associated with it? With that little blue black blue bracket? And that checkmark indicates that it's been completed on this screen, you can adjust which technician it's assigned to adjust the time and then extend it out. All of that's possible. Leave that on me. So... don't mess up anybody else's demo, but all that would be right there. And if you want to add a job, you can just go over here, do a smart search based on your customer base. You don't have to rekey in a bunch of stuff. You select that and it's gonna populate their information. And then from there, you can just look across see who's available, say, you know, for example, looks like Ben's free for the rest of the day. I can get them out there slack and select them and then just choose the day and time and then key in this information. So it's super easy to get a quick reactive repair on the schedule. And then from there, you can actually go in and click on these and click on details.

SUSAN

57:44 And when you, that's gonna show you a little bit right here, if you want to get back in and like add parts, labor, go a little bit more detail with that, you can click on that and take you there. So that's scheduling. And then finally, I always like to end at the beginning. This is the page.

18473616516

58:03 See.

58:04 When you log in for the day on service trade, so you've got your schedule where everybody is based on recent clock events listed in a map and a list. And then down here, you can keep up with all of your obligations. So these are jobs where we promised, I made the commitment to get it done at some point in the past. We never made an appointment. So we'd need to take action on that. There's also an area, nothing qualifies for that, but there's an area for jobs that are coming do in the next two weeks without appointment. So you wanna action on that as well quickly. And this is a section you were asking about. So these are past jobs where the technician has done none all or some of the work but the office has not yet reviewed it. So this is really the zone you want to be hanging out in on a daily basis just making sure like, hey, great. We marketed complete.

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

SUSAN

58:55 We can invoice it or, hey, we didn't have all the parts we needed. I need to order something and, you know, even an aggregate, you can run a report on all jobs that have something that needs to be ordered or something that has been ordered. So that's another easy bulk way to keep up with that stuff.

*--- Parts management (purchase orders) ends ---*

SUSAN

59:11 And then of course, down here, we got money sitting on the table because the office is market complete, the tech is marked it complete. It just has not been invoiced out. So that's a great dis invitation. If you have systems where you only want one person sending invoices but you want someone else doing the other office components. But that is the grand tour of service trade. What are your overall thoughts? And what questions do you have?

*--- Paper process ---*

18473616516

59:41 No, I think that has a lot of benefits from where I think it'd just be us or myself maybe just on the service text and kind of figuring out where their deficiencies are in terms of what will make their life a little easier for them. And then back to the billing side... I know because like our, a woman that does billing here is... you know, mid late seventies... and at some point would be either moving on. So we got to kind of figure out something that we can maybe in the interim manage or be able to pass along to somebody that's... a little more tech savvy, I think and make a little easier on everybody in the office.

*--- Accounting integrations ---*

SUSAN

1:00:31 Absolutely. And...

18473616516

1:00:32 Something...

SUSAN

1:00:33 That a lot of accountants kinda rave about service rate is that it keeps everybody but the accountants and the billing folks out of the accounting software because, you know, you don't have to be digging around and whether it's Sage or Quickbooks or whatever, you know, leave that for them and then you can stay in this world and everyone's happy generally that way.

*--- Paper process ---*

18473616516

1:00:54 Yeah. Well, that's the thing is just getting it from a to B. So, you know, the text got their little issues but, you know, I kinda hear stuff here and they're walking by where's the pricing for this? And I, you know, I have a quote because it hasn't been invoiced yet so they can't get pricing for apart for another couple of days before it comes through. So then it kinda sits instead of being like just get stuff priced off, get it to her. I know they're you know, I hear a lot of phone calls. What does this, what does this mean? Or what do you, what does this say here on your ticket? Which we don't have really time for to be bothering guys out in the field for complete tickets.

*--- Paper process ends ---*

18473616516

1:01:33 And what have you... and it'll be just nice to do something professional. You know, we got a simple invoice. It's just has our letterhead on it, but I think mostly she types it on a typewriter still from that.

SUSAN

1:01:51 Like an old school typewriter?

18473616516

1:01:54 Sure. It's got to warm up for five minutes... but so, yeah, that's kind of where we're at.

*--- Paper process ---*

18473616516

1:02:01 We just got, we just got to figure out the way to minimize a lot of the questions between the two parties... and get from a to B a little quicker, sooner, little more efficient and not as many questions I believe. Because like a lot of this stuff looks similar on is a work ticket other than a work ticket is kind of a fill in carbon copy sheet with, you know, five different layers on it... which becomes, you know, it's problematic because it just goes through like I lost, you write it on like a no pad.

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

1:02:44  But when the call started kind of where it's at, which would be nice or just to look in here and it kinda does it for itself. You know, the guys checked out here is a complete is completed. You guys aren't having a call in constantly? Hey, I'm leaving such and such a job here.

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

18473616516

1:03:00  I'm going to this walmart over here. You can look on screen and say, hey, they left that job an hour ago. They're over at this project. Just simple things like that. Just.

SUSAN

1:03:12  Yeah, it's all adding up.

18473616516

1:03:15  Like every time.

SUSAN

1:03:16  You know, all these pieces that you're telling me.

*--- Paper process ---*

SUSAN

1:03:19  It makes me, you know, just think about like anytime you're pumping the breaks in your process, you're losing time and potentially money. And I'm just hearing a lot of things in your current process that are break pumps and that's what service trade is designed to get rid of is like this, you know, quoting opportunity turns into a quote that turns into a job that gets worked and turns into an invoice.

*--- Paper process ends ---*

SUSAN

1:03:42  And there's no, like I gotta stop and check on this. I gotta stop and check on this. It's like everybody's got the information where they need when they need it and it just, it flows. But something I'd like to do... you know, because I kind have a policy of not talking price without talking without quantifying value first.

*--- Customer engagement ---*

SUSAN

1:04:01  So just to kind of click exercise like to do with folks. So I know that right now PMS not aren't necessarily a huge part of things. But hopefully that loop that you saw demonstrated how we could help, you know, grow PMS and then in particular grow

the amount of repair revenue that you can get off of them compared to, you know, just kind of texting things in and, you know, that kind of thing.

*--- Customer engagement ends ---*

SUSAN

1:04:31 I'm wondering with the folks that you have, would it be fair to say that there's a good chance that collectively as a group, they could get find one repair opportunity that would get approved and work per week like as an entire group if they switch over to service trade?

SUSAN

1:04:56 Would it be closer to a half, maybe two? You tell me?

18473616516

1:05:01 Yeah, I think so. I think just with the client tell that we have are pretty loyal... have been with us for a long time. So it's either even if it's from like a major player like walmart, the smaller guy that we've been doing, you know, down the street for 15 years. Usually if we say that's what it is or something there's really not too much bantering back and forth. Sure, you know, where we'd have to... maybe come up with more proof or picture, why is to say, hey, this is actually what needs to be done other than just our word. But yeah, I mean, it's just, we'd like to look a little more professional in terms of how we build stuff, how we do stuff, how it's written... you know, I get, I jokingly, I get customers call up, say, hey, how can, you know, take a C or this or that?

*--- Invoicing ---*

18473616516

1:06:04 And a lot of people wanna don't wanna get an invoice through the mail. They wanna get it through email or whatever they'd like to pay it through. Other than sending in a check that's made to go through the, what is this? What is this paper Bill? Just tell me what it is. I'll pay it. I don't be over.

*--- Invoicing ends ---*

SUSAN

1:06:33 I didn't you email me a link?

18473616516

1:06:36 Yeah. What are we just have to get?

SUSAN

1:06:41 So...

18473616516

1:06:43 Just need to get up to speed as, and just get to a comfortable area for, you know, when either she does leave or just that we have a backup plan, you know, that somebody else knows kind of what's going on or we all know what's going on other than her little world.

*--- Paper process ---*

18473616516

1:07:05 And just to be more up to speed, you know, we've kinda grown a little bit in terms of getting ipads out and getting... you know, stuff on site. For the most part. We're most of us are, but it's like she still works out of file cabinets for where, you know, I, my files on my computer. I can look at multiple things. I can look up pricing... real time to vendors, but she doesn't know how to get to that point. So instead of that, she's calling or text to say, hey, where's the ticket for this? Or how much does this cost? Where did you take it from? Which is, you know, I grind my teeth and go, hey, I could find that out in two seconds. You just go on saying, and that's the price don't waste too much time to get an actual receipt for a cost of a part that we got two days ago, use that price or, you know, there's a lot of back and forth like that just doesn't make sense, but.

*--- Pricing ---*

SUSAN

1:08:00 I get it. So, but we kinda coming back to this in terms of quantifying this like it seems like you feel like collectively as a group, we could find one additional job from, you know, the work that we were talking about here. And, you know, if you had to guess thinking about the types of stuff that could be reported from technicians... what's the average price on those jobs?

18473616516

1:08:31 Typical sales call? Yeah.

SUSAN

1:08:35 Yeah, but just really typical like of, you know, like the loop that you saw before of like, you know, someone either calling up or a technician finding a repair opportunity and then getting that quoted out, would that be like 500 a 1,002 1,000? What are we looking at?

18473616516

1:08:51 Yeah. I'm thinking, you know... average call. I'm just thinking like average on a call whether... is probably the stick the NT at a level that and I would say it's probably up to it used to be like 758 100 dollars. They figured, you know, a quick call otherwise NT and they keep bumping that up. So I'm thinking the average call is probably a 1,000 dollars just for.

SUSAN

1:09:18 And what's your on average for that?

1:09:23  Well, that's hard to say because I don't know what she, you know, she's always doing here there. We have different pricing based on different clients obviously. And then that's like... if we have to charge somebody 500 pounds of refrigerant, they be a charge on the rack. You hate to charge somebody 40 percent markup on 500 pounds when you add it all versus just one jug one jug. And, you know, 40 percent is fine to sit here and order a whole palate, it comes all in the same location, but you're still charging on 40 percent really doesn't make sense. Yeah.

SUSAN

1:09:57  Yeah, but yeah.

18473616516

1:09:58  You'd like to, you'd like to be in that and a service thing is that 30 40 percent marked off is probably reasonable.

SUSAN

1:10:08  So, I'm gonna go ahead and tell you that this 14,700 and profit is well more than the cost of the first year service trade.

*--- Paper process ---*

SUSAN

1:10:17  So that's just a number to kinda keep in the back of your head. But of course, the other half of how we save money is through saving time because when you're at work time is money because you're getting paid. So how many folks in the office would be using service trade?

*--- Paper process ends ---*

18473616516

1:10:41  Probably just probably just three of us?

SUSAN

1:10:44  And I know it's hard to guess. But if you had to guess on average for each of all, how many minutes do you think you could save compared to your current process... per day?

18473616516

1:11:02  See, I'm speaking for myself pretty good, but, you know.

SUSAN

1:11:07  Pulling that back when you think.

18473616516

1:11:10 Yeah. Let's say collectively, let's say at least two hours.

SUSAN

1:11:14 Two hours each or as a whole group.

18473616516

1:11:17 Let's say it's a whole group because one of them is kinda, you know, the president's usually not in here the bat, but I know she could put, you know, another thing is she's kinda part time and, you know, at this point?

--- *Paper process* ---

SUSAN

1:11:31 Yeah. So we'll say for the office as a group, we'll say two hours total. And then for the seven folks in the field, thinking about how you're currently doing it, you know, dealing with, you know, paper issues, calling back and forth scheduling, hiccups, reporting stuff. How many minutes do you think each of the text could save per day?

--- *Pricing* ---

18473616516

1:11:52 Let's just say a half hour per tech, three and a half hour.

SUSAN

1:11:56 So that takes us to a total of an additional 179 days of productivity. I'm not going to be awkward and ask you how much you pay people. These are just some national averages that up hold. But when you turn that into a dollar amount that takes you up here to close to 43,000 dollars in the evaluation of the productivity. So just kinda keep this figure in the back of your head. And so, you know, kinda take that over here to pricing. And I do want to emphasize that this is something that would not include any sort of like special integrations with Sage or anything like that. This is just the cost of service trade. So for seven folks, it's 89 dollars per month per technician. And so that's gonna take you up here. And then this is, I was doing math ahead before. Apparently the onboarding is one time only never pay it again. But that's 350 dollars per. We'll have to put the equals in... this is amateur hour season. There we go. And just to kinda speak to what the onboarding costs would include, I feel very strongly and this is for me being in other roles dealing with other health escapes of bad onboarding.

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

SUSAN

1:13:27 I think we are by far the industry leader in this because it's gonna come with a weekly check in with a dedicated project manager is going to be us doing the vast majority of the list of helping you get your customer information into our system. It's certifications, online trainings for your tech, for your office staff to perform.

SUSAN

1:13:49 And, you know, on average, you know, we're looking at for even the individual point per percent. If that would be... you know, over the course of 60 to 90 days, you know, an effort of, you know, just about like 25 to 30 hours. Whereas other places I've seen it go into the hundreds. And of course, that's much less because we're handling the lift for the technicians as well as the other office staff. So that's where that fee is coming from. The other piece of this I do want to emphasize is that if you were to go to a two year agreement, first off, year one is always do a year one. And we don't charge you for year two until year two. But if you were to commit to two years, there are profound discounts that are available. So that's just something to keep in the back of your head. Thoughts on that is any sort of strong sticker shock feelings or is that somewhat in line with your expectations?

*--- Paper process ---*

18473616516

1:14:53 Yeah. I mean, we can easily come up with that just like the time lost and just questions lost or just frustration to be honest with you. I mean, there's value with that and then just going forward and how to finding where we're at instead of digging around in file cabinets to look for an old work order. What have you? But you're thinking initial onboarding would take probably 30 hours roughly an aggregate.

*--- Paper process ends ---*

SUSAN

1:15:24 Across 60 to 90 days for that point person. Now, that on average, if, for some reason and the stupid example always use like if you were like, hey, all our customer information is on napkins or something just completely crazy.

18473616516

1:15:37 Yeah. Well, hey, it might be, it might be, it's a sticky note tickets, 2000 of them. There's 2000 sticky notes over there.

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

SUSAN

1:15:50 But, yeah.

18473616516

1:15:51 Yeah, that's the initial. Yeah. Yeah, that's the whole thing is just setting up the initial for us to take time. The two of us should take timing and get a database together and get everything transferred over.

SUSAN

1:16:08 After.

1:16:08 Yeah.

SUSAN

1:16:09 Onboarding, you know, it's our job like that. The thing is like, you know, they...

18473616516

1:16:14 Say.

SUSAN

1:16:14 Like there's no perfect time to have a kid or whatever. Like.

18473616516

1:16:17 You do not need.

SUSAN

1:16:18 To get your house fully in order before sign up with service rate that's our job to help you come and get everything organized. So that like that's what we're you're paying for those 60 to 90 days for us because you'll have access for 90 days. Most folks get up and running a little bit faster, but, you know, I...

*--- Pricing ---*

18473616516

1:16:33 I do.

SUSAN

1:16:33 Kinda want to emphasize because like... I get it like you don't want to rush into something that is hopefully going to be a long term relationship and taking the time to think through it and look at the options that are available that is super important. But something I always like to caution folks about and, you know, just, and the part of the reason I do this exercise is you take this, you know, 57,000 dollars and let's just for the sake of Matthew, say like that's gonna work out to, you know, in terms of per month in terms of value, like just a hair over five K.

*--- Pricing ends ---*

SUSAN

1:17:12 And so when we start pushing the decision on a tool like this out, you have to think about the loss of, you know, for every month that gets pushed out, you're missing out the value of that five Ish K. So that's what I would kind of recommend as, you know, as much as you can, you know, have of those conversations relatively quickly, share that information.

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

SUSAN

1:17:35 Please lean on me for that. I would strongly recommend, you know, a bit of, you know, urgency in that regard because we wanna make sure that we're also a lot in, you know, in thinking about that, you know, 90 days if needed, the full 90 days to get on board because, you know, 90 days from our next onboarding date or next onboarding date is may first, five plus three is eight that's August first if you basically signed up this week.

*--- Purchase decision ---*

SUSAN

1:18:00 So in light of that, like do we feel like it would be reasonable for me if I sent you over a presentation with all this information as well as information on Quickbooks, integration onboarding? A short video that is like a little three minute video of walkthroughs. Would it be possible to have those discussions and get back together with potential next steps within the next two weeks?

*--- Accounting integrations ---*

18473616516

1:18:30 Yeah, I think that's doable.

SUSAN

1:18:33 Perfect. All right. So.

18473616516

1:18:35 Cause thing is I just know when talking to other people in the past, we have the bottom of the barrel Sage 50 accounting package which nobody really wants to touch. But I know that's not the biggest issue, but... it is something we're gonna have to... eventually here and just we sit down and figure out what our future is with our bookkeeping and who's gonna do it.

*--- Accounting integrations ends ---*

18473616516

1:19:08 I was gonna get done what we're gonna use and.

SUSAN

1:19:13 I absolutely get that. But the thing is like, so right now, you're already doing that stuff by hand. So I would, I guess I would, you know, strongly recommend, you know, not necessarily putting that cart before that horse just so you don't miss out on those benefits in the meantime. But thinking about next steps, you know, this today is the twelfth. So two weeks out, do you think it will be possible to get feedback and from all the necessary folks, we could potentially get together perhaps like see like mid day on Wednesday, the 20 sixth? Or perhaps like later in the day on the 20 eighth? Those are the times I currently have.

1:20:06 Yeah, the 26 is usually it should be fine. Mid week is always good... and usually something like after like two PM central.

SUSAN

1:20:19 Central three eastern on Wednesday 20 sixth. So I will do all that stuff for you. I'll get all that together in exchange. I just asked that in advance that meeting, either, you know, physically, not physically but, you know, have other folks join you or you bring all the necessary stakeholders feedback to that meeting. And if for whatever reason, something pops up and that's not possible, just let me know in advance. But yeah, we'll be good to go and I'll send you an email with all that stuff. I'll send you a calendar invite and you'll have my contact information if you have any questions in the meantime.

18473616516

1:20:58 Okay. Sounds good. I appreciate it.

SUSAN

1:21:00 Thanks. So do you have a good one? We'll talk soon?

18473616516

1:21:02 Thanks you too. Bye.

SUSAN

1:21:04 Bye bye.

# *The End*