



Call with CBIZ - Gregory Yaw

Trey Wood with CBIZ
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Participants

SERVICETRADE

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Topics

<i>Type of work</i>	1:54
<i>Accounting integrations</i>	2:14
<i>Type of work</i>	2:32
<i>Accounting integrations</i>	3:07
<i>Accounting integrations</i>	4:05
<i>Accounting integrations</i>	4:52
<i>Type of work</i>	6:13
<i>Accounting integrations</i>	7:19
<i>Accounting integrations</i>	9:05
<i>Type of work</i>	9:47
<i>Accounting integrations</i>	10:09
<i>Paper process</i>	10:41
<i>Deficiencies</i>	10:59
<i>Purchase decision</i>	12:57
<i>Customer engagement</i>	13:58
<i>Purchase decision</i>	14:18
<i>Type of work</i>	16:08
<i>Accounting integrations</i>	17:32
<i>Type of work</i>	18:04
<i>Accounting integrations</i>	18:51
<i>Type of work</i>	19:19
<i>Purchase decision</i>	22:40
<i>Type of work</i>	25:37
<i>Purchase decision</i>	25:57
<i>Type of work</i>	27:24
<i>Customer engagement (quoting and invoicing)</i>	32:10
<i>Accounting integrations</i>	34:12
<i>Dispatch</i>	36:15
<i>Pricing</i>	38:07
<i>Type of work</i>	40:59
<i>Type of work</i>	42:25
<i>Recurring maintenance</i>	43:06
<i>Type of work</i>	43:31
<i>Type of work</i>	44:17
<i>Accounting integrations</i>	44:37
<i>Access to information</i>	45:12
<i>Accounting integrations</i>	45:51
<i>Access to information</i>	46:40
<i>Pricing</i>	47:07

Transcript

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TREY

0:00 Hello, this call is being recorded. If you do not wish to be recorded, please hang up now. Hey, good afternoon. This is Trey over at service trade.

TREY

0:15 You said Trey, yes, sir, Trey would... Trey, what are you doing? Trey, I'm doing well, man. How are you?

GREGORY

0:23 My name is Greg. I'm a consultant with a potential opportunity for ERP selection evaluation... but I sent an email to the, hello at service trade. I don't think I've gotten to reply back in a couple of days. So I'm really just trying to get a hold of... hits. I'm thinking that we need to get maybe Tim speak on a call or director of sales. We need to have kind of fast track some information if... if service trade is interested in participating in our email... I think... I think you will be. And we've already been in touch with three or four. I think pay now for other vendors right now. I'm collecting some information doing discovery.

TREY

1:12 Trying to...

GREGORY

1:12 Fast track maybe getting a call with two or three people from the sales team on a call with... with us to just do some initial discovery and, you know, questions about the service trade application and maybe even you can answer some of my questions on this call.

TREY

1:32 Yeah. I'd be more than happy to answer your question. Have you talked with anybody about the partnership yet or is it is... is just I just a cold call or just, you know, something that you guys, you're following up on or?

GREGORY

1:47 Well, we're supporting valuation of three to four, maybe five different field service management solution?

--- Type of work ---

TREY

1:54 Okay. Gotcha... gotcha. Alright. I'm understanding now. Okay. Yeah, it sounds like you want to talk and Tim, man, I don't want to be pretty good.

GREGORY

2:02 It's probably a pretty large opportunity for you. It's the companies, 150 technicians probably grow into 300 technicians in the next five years.

--- Accounting integrations ---

TREY

2:14 You're not, so you're saying you're... you're a consultant for that company. They're... they're looking at an ERP system. Okay. Gotcha. I'm understanding you now. Okay. Sorry. Okay. So you are looking at, I can answer some questions for you. Then let me here. He's my notes here for you here... right?

--- Type of work ---

TREY

2:32 So you said it was 150 technicians... and they're doing, are they doing mostly fire protection or is... is HP AC, or?

GREGORY

2:43 So, they're in a commercial refrigeration?

TREY

2:47 Okay.

GREGORY

2:49 So, warehouse refrigeration, you know, food and beverage refrigeration for, you know, grocery stores, my gas stations, where, wherever, you know.

--- Accounting integrations ---

TREY

3:07 150 text and what are some of the things are looking for as far? Like are they looking for, you know, an accounting system as well or just a service plug in or?

GREGORY

3:16 They're on Quickbooks right now. So we are... we are gonna, we want to ask you about your accounting integration.

--- Accounting integrations ends ---

GREGORY

3:22 Yes, sir. What system you might recommend? Yeah, what are your back end financials? I can give you a little bit more background on the client. We are not under an nda. Yes, I can't give you a lot of details, but.

TREY

3:37 Okay. Yeah. Yeah, we... we weren't you know, we're a preferred vendor for them. So just, you know, I don't wanna make you kinda feel like you have to share too much man. I just wanted to more see, you know, just let you know that if that's what they're on, you know, if they're looking to switch, of course, we can try to, you know, reference some other ways but Quickbooks work very well with our platform. We're preferred vendor for them. So, yeah, we can work with all of.

--- Accounting integrations ---

GREGORY

4:05 We are looking, we are looking to replace Quickbooks located the worst thing, single instance ERP system right now. They're on six separate there's, six separate sites, all running their own version of Quickbooks. And we want to, we want to replace that with a consolidated, right? Single instance ERP system.

--- Accounting integrations ends ---

TREY

4:27 Okay. With an ERP system?

GREGORY

4:30 Yeah. And we're pretty... we're pretty versed in the ERP landscape. So, I think from that perspective, we just need to know, you know, what... what your integration options look like out of the box... versus... versus what would be more customized, you know, intense integration development... if we're looking at a NetSuite or dynamics or a Sage intacct, right?

--- Accounting integrations ---

GREGORY

4:57 Or, you know, another ERP system... you're gonna, we're gonna need to understand the integration complexity if you will. And really what you've done with your qualifications are.

TREY

5:11 Right. Okay. Yeah. Hey, man. I'm definitely, I was part of the... where are you guys located? We are?

--- Accounting integrations ends ---

GREGORY

5:23 Merge... I'd say we are east of the Mississippi.

TREY

5:28 Okay. Gotcha. Yes. So, you know, we... we, you know, we got some big names and I'm in the indoor territory. You know, I am now and... and management. But before I was in the north territory and, you know, I had, I helped bring on the software in group and, you know, brought on... you know, a couple of different waving fire protection in Maryland, there about a 50 take shop that they went with. They actually went with Viewpoint for accounting. So, you know, yeah, we can definitely go over and they were on Sage before, you know. So we've had a couple of different, you know, big companies we brought over that came off a Quickbooks. So I definitely understand that. Yeah.

--- *Type of work* ---

GREGORY

6:13 I missed that. What was the name of the company?

TREY

6:16 So, I don't know if he, if you ever heard to you guys, do, you know, like the software group, they're... they're... they're pretty big and they do a little bit of... of, they do commercial HB AC. They're pretty big up there. I don't know if you guys have heard of wave and fire protection in Maryland. They're pretty big and layman, W a YM a N fire protection. You guys are in commercial refrigeration only or do you guys do HPC as well?

GREGORY

6:49 HB AC as well. Mostly... mostly construction. So, new construction.

TREY

6:56 Okay. Gotcha. Yeah, it's hard to say.

GREGORY

6:58 Improve, but it's 100 percent commercial. It's weird. We're not residential.

TREY

7:03 Right. Okay. Gotcha. Yeah, I know that.

GREGORY

7:08 Sorry, I'm gonna ask you a few questions here, Trey, just trying to get some... some intel to fast track this. So when... when you say it was 50 tests, they replaced Quickbooks.

--- *Accounting integrations* ---

TREY

7:19 Yep. Yep. Yep. Raymond did replace Quickbooks kind of before they talk with service trade though. And then... and then when they came to us, but yeah, I can definitely get you some customer stories as far as switching off Quickbooks in two ways we go. But, you know, we don't...

GREGORY

7:37 He said they switch the switch, Quickbooks and went to vista.

TREY

7:41 Yeah, yeah. They wouldn't be point and then the extra chaining and a whole bunch of other stuff, but, you know, the software in group, the ones they were on Sage. And as well as we brought us over some customers from... I mean, I'll... I'll a variety of, you know, accounting platform, but we're... we're now focused, we're working with Sage to, we have a, we have a partner who's you know, we're working on building out that integration, you know, at all levels there, there's a lot of levels that we can integrate within Sage and then some that we can't and then...

GREGORY

8:17 Sage, Trey would say product, are you referring to?

TREY

8:21 We, I can either, we can do 300, we can do a couple of different ones. I'd have to get you some more information on that. We can go over that on the demo. But yeah, I would need to get you, I'll make note to get you some, you know. So all the... the versions of Sage, we can work with it kind of we can have that.

--- Accounting integrations ends ---

GREGORY

8:40 We want us, we want to, we want to bifurcate the analysis, right to integrations that you have deployed that are out of the box right there already pre-built... with what you would consider custom like right? To us. We're trying to distinguish the capability to integrate it, which means we gotta build it from the ground up.

--- Accounting integrations ---

GREGORY

9:05 But the hooks here, they're the capabilities there or we already have a pre-built integration, right? It's already designed. It sits inside of service trade, right? And it's up and running in a matter of hours, you know, something like that. We want to understand the integration capabilities, right? Okay. Gotcha. Because we know a lot of systems can integrate with anyone, right? But the question is, have you built integrations before the out of the box and then do we have the ability to access those quickly integrate the software, or do we have to build something from scratch, right? From more of a customized integration?

--- Type of work ---

TREY

9:47 Okay. Gotcha... gotcha. And as far as the background goes, they're doing mostly commercial situation and they do... do some HP AC and it's 100 percent commercial? You said?

GREGORY

9:57 Yes, yep. Marshall.

TREY

10:00 Perfect. Yeah, we're geared for the commercial side. Okay, harms that commercial. Do you know how they're currently handling things? Like are they currently doing on paper?

--- Accounting integrations ---

GREGORY

10:09 Lot, a lot of paper and excel. They do use Quickbooks very lightly. And... they have one, they have a field, this batch tool that they use... that they're using just for dispatching. They don't use it for quoting or time entry or a job, you know, job code, tracking things like that. It's just strictly dispatching that's all what's it called again... field apps, I think this.

--- Paper process ---

TREY

10:41 Build off. Yep. Yep. Yep. That, that's it filled up. Yep, I've heard of them. Okay. And then as far as they say, they write all Quickbooks lightly for accounting, excel, paper tickets and then field ops and then do they have like whenever you guys are going out in the field and do in... in, you know, doing repairs and stuff, are they kinda like taking pictures through the platform or they just, you know, basically call the boss man back and forth and tell them what's broken and what needs to be fixed and things like that, or do they have a... a system for that?

--- Paper process ends ---

GREGORY

11:12 There's there's a lot of phone calls back and forth to get... to get pricing and quotes for equipment and parts, things like that.

TREY

11:22 Gotcha.

GREGORY

11:23 Okay. I don't... I don't know if they're taking pictures today. That is definitely something we want to incorporate in the future state but not a key, you know, the real key, correct requirement at this point. So in terms of the process, we, this is the first step for... for me and the consulting having to qualify the vendor list. And we're going to be, you know, requesting additional information. We'd like to potentially demo service trade. And, you know, if we feel like you have the qualifications, what I may say qualification, I mean, case studies with like a dog run group and some others that are in that 150 to 300 tech range... it could be, have good qualifications and, you know, can prove that you... you play in the space. And for the larger, you know, larger companies, I think that would be something that I'm the director of our project would... would be very interested to hear very quickly because we're trying to narrow the list down by Friday and this is fast track process to get to three, maybe four vendors for demo?

TREY

12:37 Right. Okay. And, you know, let's say, excuse me?

GREGORY

12:44 Yep. Go ahead.

TREY

12:46 I was gonna say, yeah, if you... if you didn't know your list, we definitely want to try to get you in and you say it was east of the Mississippi is if you don't mind me ask you, where would it be headquarters out?

--- Purchase decision ---

TREY

12:57 That's how we arrange our territory map? And I was gonna look at the, you know, the mappings in the calendar and see come won't be the best day to kind of look at a demo, Tom. Forest.

GREGORY

13:07 Well, we're going to need to qualify you first. We wanna make it to be invited in for a demo.

--- Purchase decision ends ---

GREGORY

13:14 We're going to need depth, some dialogue and discussion. I think we'd want to hear from Tim and we'd want to hear from maybe... the sales team from that territory... maybe Tam, I think we want it, we want to understand the qualifications and the level of functionality the product has around construction jobs. You mentioned Wayne and fire. They replace Quickbooks Viewpoint. Yeah. And I was gonna ask you on the general on the cyber group, there's a commercial H back or that you're not many text they are, what size they are.

TREY

13:55 Yeah. There are a little bit smaller. That was just one job worked.

--- *Customer engagement* ---

TREY

13:58 I, I've just shared your personal story there. But, yeah. Well, yeah. Those... those stories if you... if you don't mind, their stories were just me telling you kinda in general, you know, trying to relate with you to help you see kind of, you know, my experience with that, you know, I'll I can get you some customer references if you would just don't mind, you know, that was just me kind of share with, you... you know?

--- *Purchase decision* ---

GREGORY

14:18 Yeah, no.

TREY

14:20 Yeah, yeah, that was me more just trying to relate with you man, you know, I... I make enough that off of this by just wanted to kind of give you a, you know, a safe. So in there to... to that, if you're not wasting your time here with this conversation, but yeah, if you wanna ask me some of the bigger things man, I can kinda check them all for you and take.

--- *Purchase decision ends* ---

GREGORY

14:38 Yeah, likely their headquarters is likely going to be outside of Chicago. They might grow regionally but right now Chicago. So to their, you know, their... their corporate, huh?

TREY

14:49 Okay. Gotcha. And I'll let them tell you this. So, but you'll probably hear Chris and Danny tell you a little bit about sort of site. I don't know if you've heard of sort of site but sort of side is probably our big biggest customers up north. I know.

GREGORY

15:08 I'm sorry, service side S ID.

TREY

15:11 Sort of CERTOS, ITE... they're I think their own manual to don't quote me on any of this, like I said, but I think they're about 203 100 tex. Yeah, but they're one of our biggest customers up north. They're based. I wanna say that their headquarters when we last talked to them wasn't Indiana... Indiana.

TREY

15:40 Construct annapolis action.

GREGORY

15:43 Yeah. Yeah. What kind of what kind of services do they goodbye?

TREY

15:47 They provide everything as far as HP fire protection, HP, AC, they do a, you know, a little bit of service on that, but they're mostly more, I would say more fire protection oriented, but like I said, they're they, they're doing a whole lotta you know, they're doing everything there's seven hour.

--- *Type of work* ---

GREGORY

16:08 Hi percent, 100 percent commercial, or are they residents?

TREY

16:11 Correct, correct. Their commercial, and that's why they came to us just because we were commercial read, they're pretty big. I don't know if, you know a read that one of our customers... VS.

GREGORY

16:27 Nice to get a flavor of recent wins like two weeks, it recent implementation.

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

TREY

16:35 Okay. Yeah.

GREGORY

16:37 Last say the last three, you know, two two, three, four years. So, what that's how this is that your software is... is... is updated, right? It's modern people are still buying it. Yeah, if these customers implemented service trade 10 years ago, that's good to know. But we also want to know that you're continually winning business, right? You're... you're beating... field away as ServiceTitan, BuildOps. I've got a list of them in front of me here, service, max, service power. We want... we want to know generally that some of those recent qualifications, right? Say maybe key wins in the last five years.

TREY

17:27 Okay. I'll make note of that keyword in the last five years.

--- *Accounting integrations* ---

GREGORY

17:32 Yeah, it'll be great to know what system was replaced... and... if... if that's possible?

GREGORY

17:45 One other question, Trey on the functionality side, are you familiar with the actual functionality within the system?

TREY

17:55 Functionality system as far as can, you can explain that to me a little more. Sorry, I'm trying to make notes and list he is, he?

--- *Type of work* ---

GREGORY

18:04 No, no worries. I don't wanna, I don't want to rush you, but we're just interested to know how your, how the service trade platform handles sort of the construction side of... of these... these companies. These contractors from there involved in construction projects versus a repair ticket, right?

TREY

18:24 Correct, correct.

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

TREY

18:25 And I can give you some live under that. So if that's something you're looking for, you know, I don't wanna waste your time, right? And I know that you guys have a laundry list that you're looking forward to kinda certify, but I'll go ahead and get out in front of it until you, we are not doing a whole lot of most of our construction side goes with pro core and they run service traded pro core together.

--- *Accounting integrations* ---

TREY

18:51 But we don't do, you know, long projects. We don't do really a lot of those functions. We're more of a service space platform and are really good. It may it, we can... we can integrate with pro core where those guys can go in and put their time in over there. But really only time is the only thing that those guys are really doing the service guys that are coming over or integrate and those technicians over to pro core, they're just really tracking time and they're... they're not doing, you know, there a lot of their work orders and stuff.

--- *Type of work* ---

TREY

19:19 They're doing all that stuff through service trade, but we don't do like I'm saying, we're not... we're not a huge construction platform. You know, we're more strictly service, I'm just so you know, ahead of time as well.

GREGORY

19:32 So, so for like a side run group, right? Or service site. And if there's... if there's a new Bill, there's a construction project. How are they handling some of the construction requirements around quoting? You know, job tracking, job costs, drag and do they use, do they use service traded? Any capacity? Or just you mentioned time tracking, but is it just for time track?

TREY

20:01 No. So they use service trade for and a lot of our customers, you know, are in the three to four month range projects, you know. But if you're doing year long projects and stuff that's where it kinda gets in the gray area if service trade to fit, if that makes sense for you. And I know.

GREGORY

20:20 Hi, this is, you mentioned on your website that you're in commercial refrigeration... think that was one of the industries if I?

TREY

20:28 Yes, sir. We.

GREGORY

20:29 Are, so refrigeration is very similar to this company. They're... they're a sub themselves, so they do a portion of a construction project, not the full building, right? They are, you know, doing a two to four month project within the overall build. So probably it's a new where let's say it's a new beverage warehouse, new Brewer, you know, building a warehouse, they might come in and do a refrigeration install and to... to six months, right? Grocery store. Is there any other refrigeration type stores... stores add refrigeration could be a new build, right? A new... new store, they're... they're in there for a couple of months. So they're not, they don't have a long cycle. Yeah, they're not a general contractor if you will. They are, you know, asked to produce some... some estimates, some construction estimates. They're billing is based on construction industry, right? Progress billing, revenue recognition, their technicians that are working on the construction projects, just like any can technician, right? They have to track their time to the job. So I... I wanna say that construction requirements are somewhat lighter.

TREY

21:50 Okay. Yeah. Yeah. That's what I was.

GREGORY

21:52 Cool. Yeah. Then if, but they do some government work and the government requires certain instruction, you know, overhead and paperwork and all these, you know, schedule a values and certified payroll type requirements. So there is some

definitely construction industry requirements. I don't wanna, I don't wanna under estimating, but I also don't want you to think that, you know, it's a, they're... they're managing 1,212 to 24 month projects, right?

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

TREY

22:21 Okay. Perfect. Yeah, that's... that's perfect. We can handle it then we'll kind of go over how that works. That's another thing I was gonna say is, you know, I can talk at you all day Tuesday to really get you a good. And those demonstrations are, you know, pretty quick as far as, you know, we can get them done pretty quickly.

--- *Purchase decision* ---

TREY

22:40 And then we can do even more in depth if, you know, if you wanted to grab a bigger, you know, audience, but I was gonna say, you know, just if... if they made sense span, you know, I can just hop on with you. Hey, Chris... Chris can, well, you know, it can hop on and Tim, you know, we can kind of give you a quick rundown of the platform if that would make more sense rather than kind of by going through... through a... a full presentation at first. But the other than that, it would, we would be entertained.

GREGORY

23:07 Yeah. Maybe a quick introductory call, you can walk us through the product, all the capabilities, talk about construction a little bit, maybe where you think service trade would, where it would start to break down and require a pro core, right? And what some of those criteria, I think that would be good. Do you guys have any time on Friday this week? Yeah.

--- *Purchase decision ends* ---

TREY

23:31 Yeah. Yeah. Let's look at, let's look at the calendar for Friday man. I think that is going to be best. And, you know, like I said, I don't mindset here in... in talking with you all day. I just don't want you to get confused on some of the things that are kind of hard to explain over and it's so much easier. You know, we get on the demo and, you know, I can answer a lot of those questions, but I think that... that would be great for us to do. I have a, I do have a tight window on Friday. Would 12 Eastern Standard Time work for you guys by chance?

GREGORY

24:02 I'd like... I'd like to, I'd like to be on that call. How about water? Would one to... to?

TREY

24:09 I have something at one 30 man. I do have an extra Tom... three to four.

GREGORY

24:19 How about Friday morning?

TREY

24:23 Friday morning... we have... we have something as a company wide from eight to 11, and then I have a followup call 11 here.

GREGORY

24:34 Hello. Let me... let me check. Hold on. I'm checking my director's calendar here.

TREY

24:40 Yeah. And I can also do.

GREGORY

24:43 About tomorrow morning would be eight AM eight, nine eight.

TREY

24:50 Let me see if Chris can do that. Let me see if Chris could do that.

GREGORY

24:54 And it doesn't have to be a full on demo. Either can be showing some screens and, you know, just talk into the solution and just high level.

GREGORY

25:14 Let's...

TREY

25:14 See if he, because he's on the road, but he might be able to do a demo at the airport or something. Hold on. Let me see.

GREGORY

25:23 And again, it could be just a phone conversation to start Trey, it's...

--- *Type of work* ---

TREY

25:37 I think that would be nice man. Maybe like a discovery call or you can just kind have, Chris can tell you the ups and Downs and you could tell you everything because Chris used to be and... part cells. He's been all industries that this industry, you know, commercial refrigeration, commercial, HP, AC plumbing.

--- *Purchase decision* ---

TREY

25:57 He's been in all those industries. He's... he's real good man. He's probably one of our... our best outside reps. He's... he's one that works too big opportunities and stuff. So he definitely, I just ask him. He said that... that he thinks that would be great is more of a discovery call first just to make sure we're a good fit for you guys and you're a good fit for him. And, you know, if that, we don't because, you know, I don't... I don't know every it's an about to about it that I want to get, you know, way down in the sales process and, you know, something that I could have told you the beginning would have eliminated us from, you know, have even wasted our time on a demo and stuff.

--- Purchase decision ends ---

GREGORY

26:35 Yeah, that... that makes sense. Is there any... do you have any information on that service site qualification? Like, do you know what they... what they implemented from a accounting perspective? Like do they have what stage Intacct or 300 or?

TREY

26:53 Yeah. Sure. Chris will be able to answer all those questions for you, man. He... he put them, what was the company name again? Chris was actually asking me.

GREGORY

27:03 Where do we have to sign an nda? And we're going to put together a vendor RFP which will give you a lot of information about the company and... and cleaning other sites. So we're kind of holding off at this point until we... we have a shortlist of vendors and then we'll send out a more formal document after we signed an nda is... yeah.

--- Type of work ---

TREY

27:24 Okay, sense.

GREGORY

27:26 But yeah, 150 text now growing to 300 potentially, right? And the next three years commercial H back refrigeration maintenance and repair. I'll say maintenance repairs, half of the business and the other half of their time are on construction projects.

TREY

27:45 Wow.

GREGORY

27:46 As a sub, so there's a sub contractor, right? And... to... to four month projects generally.

GREGORY

27:59 And that was construction prior. So it can be like a complete remodel ever have a store and overhaul reconfiguration, right? Yeah, equipment around replacing equipment, plumbing, it, piping, it, electrical controls, all that kind of stuff that would go with sort of refrigeration units and AC units, H back units.

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

TREY

28:19 Yeah. And then that... that... that was a, you said that was an MD, may... mba masters?

GREGORY

28:28 On disclosure agreements that's basically a confidentiality agreement.

TREY

28:32 Okay. In the, okay. Yeah. Okay. Gotcha. Okay. Yeah.

GREGORY

28:38 I'll go ahead and send that to you. If you can get it signed. You know, that would be great if not, we can just kinda talk, you know, talk high level.

TREY

28:49 Okay. Yeah. Yeah. That sounds great. What I was gonna say is... is... I can put, I'm gonna, I'm... I'm actually back and forth with Chris right now. I'm trying to see when he won't be, would you... would you be okay with just call it... call it a sale or he giving you a call on his cell and just going over like that for our first discovery call?

GREGORY

29:08 Yeah. You want to do that tomorrow? I can put it on the calendar and send him a dial in number.

TREY

29:14 Yeah, I was gonna say I can... I can send him, I can send you a calendar invite, you know, or we could do vice versa. I'll send you a calendar.

GREGORY

29:25 Invite. I'm, going to invite someone else from the cedars team. So I work with let's see this big consulting organizations. So I'm gonna invite a couple of others to the call. They may or may not make it, but at least want to get them invited. So why don't I send out the invite? Do you want to give me contact him home or your email? And you say Chris is the contact that I'd be talking about?

TREY

29:55 Yeah, Chris could well.

TREY

30:06 Yeah. I was gonna say what I can do is man is I can send out a calendar invite to you and you can forward that over to your... your people. Just said that, you know, so we can have Chris king Wells... you know, we can have his meeting room setup in there. And that way he can kind of run it that way so that if he ever done, if he does need to hop on, you know, hop on and share his screen and kinda go through the platform. He has all that ability there. And.

GREGORY

30:33 Yeah. What's your email, send you our contact information right now?

TREY

30:37 It's DQ, W, actually send it to this one, TREY dot lead... at service trade, dotcom.

GREGORY

30:56 I'm gonna just call it, see this because that's our... that's our consulting company client name is confidential at this point, but I'll send you a contact information to a couple of individuals and... we'll plan on... eight a. M eastern tomorrow morning.

TREY

31:17 I need to confirm with him on that, but what I was gonna do is I'm just gonna get your email address and I can give Chris a call here. And if... and if it's or if you wanted to wait on the phone, I'm actually back and forth with him right now, trying to figure out a good time for that. And then.

GREGORY

31:38 So, Thursday, eight AM eastern or I'll say, do you want me to offer the Friday?

TREY

31:44 Yeah, the Friday, the twelfth would be great. That would be great.

GREGORY

31:49 Friday, we can't I can do one or 12 30 to 12 30?

TREY

31:56 Eastern, 12 30 eastern?

TREY

32:04 I think that should work for them to ask him.

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

GREGORY

32:10 I'm gonna put it into my email, you guys can decide and then...

GREGORY

32:17 You can, you can choose, I'm gonna send you an email right now... with two time options... see the team?

TREY

32:33 Okay. Yeah. If you wanna add him in, I'll give you his email as well.

TREY

32:41 Sure. You're ready.

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

GREGORY

32:46 Yeah, I'm ready. Okay?

TREY

32:48 Hi, it's Chris CHRIS dot KIDWELL at service trade, dot calm.

TREY

33:07 And... that's his email and 12 30 won't work for him on Friday next week. That's why I was gonna say maybe we look at... at the... the next week and I could shoot you some of our availability or you could shoot me yours however you want to do it. I could schedule it a bit for us as well and shoot you an invite. And... because he... he is pretty booked up.

GREGORY

33:33 Time, any other... any other times tomorrow, like during the day, might, could... could that work for an intro call? Like 10 30 eastern?

TREY

33:43 Yeah, he's on the road model where he's at a customer's location here?

GREGORY

33:47 So...

TREY

33:49 Yeah... he's pretty busy this week, man. I hate that. Yeah, I mean, I can... I can try to see if...

GREGORY

33:59 Here's what we could do if... if these, I'll shoot you this email off the times don't work. I'll give you a couple of options for Monday?

TREY

34:11 Yeah.

--- Accounting integrations ---

GREGORY

34:12 But in the meantime, if you can send us more info on the product technology, if you wanted to office staff based web based technology. It's... it's sort of old client server, you know, remote desktop and we want to know... how... how modern the underlying technology is and what the sequel based?

--- Accounting integrations ends ---

GREGORY

34:33 Is it? Yeah, dot net, Java, what kind of programming languages? Do you have any details on the underlying technical architecture? You could send us in advance of the call, that would be, that would be helpful.

GREGORY

34:54 And I will... I will also the case studies that we talked about like any case studies with that 150 to 300 tax, some level of construction, maybe like construction with... with service... commercial service. He mentioned a couple. So maybe those... those are good ones. But... Monday, I'll just add to the three PM eastern. And if any of those times don't end up working, Trey, just let me know. I'm gonna shoot you this email right now and... make sure it goes through and you... you get an email from me?

TREY

35:40 Okay. Let me make sure.

GREGORY

35:43 Okay.

GREGORY

35:56 Let me know when you got that.

TREY

35:58 Fresh in my inbox. You don't see it. Let me make sure the goods spam.

--- Dispatch ---

GREGORY

36:15 Hold on a second. Trey would at Trey.

TREY

36:18 Dot word.

GREGORY

36:24 I start service wrong? I think it went to Krista, Trey TREY, dot work?

TREY

36:30 Yes, sir.

GREGORY

36:32 Service say dotcom. Okay, great. Let me... let me try this again. I think I spoke service wrong in that last one.

--- Dispatch ends ---

GREGORY

37:25 Did you receive it yet? Okay?

TREY

37:28 I have not, may not making sure it, is, it, are you still in an?

GREGORY

37:34 Yeah, she our.

TREY

37:35 Just got him. He just got it. Just got it. Perfect.

GREGORY

37:39 So, there, there are some times, I know it's short notice, but it's my Friday 12 30. We can make work Monday to... to three if none of those work, let me know and I'll... I'll... I'll check more times, but we're very forward to talk to you guys.

TREY

37:54 Yeah, man.

GREGORY

37:56 And learning more about the software package in your coordinator case studies?

TREY

38:00 Yes, sir. For sure. And what, what's a good number to call you back? What is this the best number for you here?

--- Pricing ---

GREGORY

38:07 Yeah. So six one six, five, eight, one, seven, eight to five.

TREY

38:11 Six one, six, eight... one six one six, eight one. What was the last four?

GREGORY

38:18 Seven eight to five?

TREY

38:20 Seven eight. Perfect. Okay. All right. We'll make sure I had that and... okay, fortunately, hey, well, Gregory, I really appreciate it, man. And I will and CA, sees data. David, is he going to be on the call as well?

--- Pricing ends ---

GREGORY

38:45 Hello, David on Central Time, so that's going to be a little early... if... if we do the eight o'clock call, but I take your time is of the essence. So we'd rather do something gave it can be optional, Mike optional.

TREY

38:59 Yeah, we could record it for them as well. We do a demo, you can record.

GREGORY

39:04 Yeah, yeah, that'll be great. Can you confirm, let me who are your top three or four competitors in this space? I don't wanna make sure we're thinking about this the right way?

TREY

39:17 I'd say... no, we're... we're pretty big then like Microsoft platform, fire... fire pro 365.

TREY

39:32 I'd say... service tightened is pretty big.

GREGORY

39:41 You often compete against Microsoft D3 65 field service.

TREY

39:47 We've gone up against it. Yeah, a couple of times women that were told you about, they were looking at fire pro... I've had.

GREGORY

39:57 You know.

TREY

39:58 ServiceTitan pretty big.

GREGORY

40:01 Is fire pro a dynamics CRM?

TREY

40:05 I almost want to say yes, sir, sure. But I'm not positive on that, but I think so. I didn't like I said, you know, we showed our value to them with our platform over the demo. We didn't have to really, you know, go gets competing against them, you know, and learn about them. So I didn't really, you know, get a lot of information around that, but I do know that they were... they were a lot more expensive. They're quote was too. And I noticed by customer kinda actually told me that, but yeah, I... I think that Chris is going to be, you're going to be able too, and I'm sorry, man. I don't want, you think, I don't know what I'm talking about. I do, but I just a lot of the big stuff, you know, when we get into these big... big opportunities, I, you know, I was only working from anywhere between, you know, 40 texan below, Chris works the bigger ones, you know, in a meeting, he knows all the up on the back end. So I just don't want you to think about what lead history.

--- *Type of work* ---

GREGORY

40:59 Yeah, no, you're... you're spot on as a service tightened has been on our radar D3 65. We're looking at probably five or six others right now trying to.

TREY

41:08 Okay.

GREGORY

41:08 Yeah.

TREY

41:09 I heard you say something about... field. How was that? When you said... man, it's the new one that the guys from service tighten. They let a couple of the guys left service tighten and they went, did their own start up.

GREGORY

41:26 Build apps, is that to build?

TREY

41:28 That's the one BuildOps. Yep. Yep. I've... I've heard about them. I'd be careful with them and they're start up but yeah, yeah, definitely. Once you see service trade demand, we like I said, you guys, water heater, you know, don't quote me on these outside of our conversation, but y, water heater was looking at service.

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

TREY

41:47 Tighten came to us. They are 100 tech company came to us with service trade. We just brought them all and I think that wasn't one of our big recent wins. That was, I think that was a cell Q4 or key or Q1 I can't remember but yeah, that's one don't quote me on that one but they'll they might bring that went up to you as a recent person. We went up, you know, big... big well, we went up against... against with service tighten. We'd probably, I'd say they're our biggest customer Greg to be straight up there. They're our biggest customer. I mean, our biggest competitor is a service type.

GREGORY

42:19 Yeah, is residential.

TREY

42:24 Yeah. They did... they did... they did some residential work that's another reason why, you know, we, but they... they, they're the way they're workflow, they will do a lot of warranty work and stuff.

--- *Type of work* ---

TREY

42:33 So, the way their workflow is set up, you know, with the commercial side of things, it was almost really basically commercial work and it was a different situation and they run man, you know, you guys are obviously the better fit for a commercial company. And because service tightened has just recently actually started doing commercial and they're in that phase of that and the research phase of that and are kind, have, you know, talking to game right now but they haven't been in the space. We've been it, we, we've stayed strictly in the commercial space and that's where we're at.

--- *Recurring maintenance* ---

TREY

43:06 Now, we've been in this space for eight years and we only do commercial focus. So, you know, all our platform, our Bill twos are ship twos you'll see on the demo, you know, all that is set up, you know, for a commercial, you know, job at a commercial structure to an invoice and things like that.

--- Type of work ---

TREY

43:31 And I think you'll see, I think you'll see on the demo but, you know, because a lot of these guys, you know, they, they're doing a multi family residential home and they can say that for digital but it's really commercial work because they're not build out. Each one of those customers are built out but, you know, the property association or whatever, and it's easier just to have all that history and all that work under one location where you can just send an.

--- Type of work ends ---

GREGORY

43:53 Yeah, yeah, yeah, definitely. That's... that's more commercial Ish, yeah, yep. Yeah.

TREY

44:00 That's...

GREGORY

44:01 Good, good analogy. Yeah, yeah.

TREY

44:04 Yeah... but... but yeah, I mean, I don't want to harp on TV things. I know we've been on the phone while don't wanna take up your time in and I'm just talking to talk but I just want you to know that, yeah, you are right on pay, you know, par with... with everything else.

--- Type of work ---

TREY

44:18 If you're looking at something like service tight and stuff, you know, we're... we're... we're right along those lines and, but we are more of a commercial focused, which is good because you guys are strictly commercial but just wanted, you know.

GREGORY

44:30 Hi, can you speak to the technology is... is a SaaS based solution or is it hosted service trade or?

--- Accounting integrations ---

TREY

44:37 Is our... our servers right off the Amazon or Aws sponsored ads ran? And we, we're a cloud based system. So all of our stuff runs through the cloud. We pay the same guys that net flicks plays. You know, we pay all those, you know, big names

over an Aws sector to hold our data to keep that safe. And, you know, to be our kind of our servers and things like that. And we in, like I said, it is a cloud based system and we do some of the research and development too as well here in the Raleigh office. So we, I can like kinda Chris touch on that that's a little bit of the... the stuff that he knows a little bit more about, you know, how exactly it talks to the cloud and things like that, but I do know that... that is the general structure of how our platform is setup and it's...

--- Access to information ---

GREGORY

45:25 Hi, this, is it a web based solution like that when you... when you log in or are you logging into a browser?

TREY

45:31 Yes, sir.

GREGORY

45:32 Or?

TREY

45:33 There's a mobile application as well as there's a, you know, a server base, a server platform from the office side that you use on your computer, but, you know, most of the technicians in field would be running on the mobile application and then the office side runs on the server based, you know, platform.

--- Accounting integrations ---

GREGORY

45:51 As the office... the office side, is that web base to, they gotta be logging in through a browser on their desk, yes, sir. Desktop.

TREY

45:58 Yes, sir.

GREGORY

46:00 Okay. So it's web-based... any info on the underlying architecture, the database programming language?

TREY

46:15 As far as programming language... language goes... I'd rather him manager that it, that it's an... yeah, I don't wanna, I don't wanna say anything wrong there.

--- Accounting integrations ends ---

TREY

46:28 Like I said, he, he's more complex with all that stuff.

--- *Access to information* ---

TREY

46:40 But, yeah, I think data, you know, Chris is going to be a valuable resource for you guys so that you don't... you don't there's no wrong expectation set there as far as what we can do, what we can't do... but yeah, no, we are, you know, it's web based as far as when the office logs in and we don't charge, you know, we charge cards the subscription based and it's based off a technician license.

--- *Pricing* ---

TREY

47:07 So your office staff, it's free to service. Trey. We just take charge based off of your, you know, your 150 guys and then that's kind of how that works. As far as so, you guys know, going in that's how the... the payment structure breaks down there.

--- *Pricing ends* ---

GREGORY

47:23 Yeah. Okay. No, I look forward to the call. Let me know. We'll look forward to invite either tomorrow or Friday or Monday, whatever works for you guys. And we'll go from there.

TREY

47:35 Hey, that sounds great, man. I really appreciate it. Like I said, if... if you know what I told, you... you know, you should stay between me and you, that would be great man. And then I'll let Chris know that we had this conversation and I'll let him kind of pull out the, you know, all the evidence he knows about, you know, exactly how those deals went down, how they made that switch and everything like that. And I'll let him know there's some of the things you're curious about. That way he can address those on the call and make sure you have, you know, full understanding there.

GREGORY

48:04 That's good.

TREY

48:04 Yeah, yeah, I appreciate it, man. You guys have a great day and I'll have him email you. I mean, I'll be email contact with you or give you a call this week.

GREGORY

48:14 Okay. Sounds good. Take care you.

48:16 Too.

The End