



ServiceTrade Regroup w/ HCL Mechanical

Matt Hetrick with HCL Mechanical Services LLC and Humphrey Company Ltd
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Participants

SERVICETRADE

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OTHER

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Transcript

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MATT

0:00 Hey, Alicia.

ALISHA

0:01 Hi, how are you?

MATT

0:03 Good afternoon. I'm good. How are you?

ALISHA

0:05 I'm good.

MATT

0:07 Yeah. Okay. Glad to hear that it is hump day after all.

ALISHA

0:12 That it is ready for the weekend already?

MATT

0:17 Look, because we're only halfway there.

ALISHA

0:19 We're getting there.

MATT

0:21 That's right? So, I understand Jill has some stuff going on with a kit. She wasn't able to join us today.

ALISHA

0:29 I didn't know that I've been busy myself. I'm taking off a couple of days, so I've just been trying to get everything done that's good.

MATT

0:36 Yeah, we.

ALISHA

0:37 Probably won't be able to get back with you on anything till Tuesday or Wednesday of next week.

MATT

0:42 Yeah, that's fine. That's fine. I know we threw out the twentieth just as a goal just to kinda be mindful of... getting something done, but, you know, we can't control everything so that up and bumps back.

ALISHA

0:58 Right.

MATT

0:59 So, cool. So, a few things I wanted to check in on. Did you get a chance to speak with Ben blandshard over at also?

--- Accounting integrations ---

ALISHA

1:08 Yes, we did. He definitely love the service trade. He said that there are some little issues that he wishes would basically kinda the same thing that we were like, you know, you can only do certain things on service trade that don't go to Sage type of thing. The integration on both sides, but it's basically just re, learning how we do things instead of doing it on the Sage side.

--- Accounting integrations ends ---

ALISHA

1:36 We're going to be doing it on this side. So, I mean, we understand there's going to be hiccups. It's not all gonna be perfect.

MATT

1:44 Yeah. Well, and that's again, that's the thing that I love about being able to offer customer references, is not just singing service trades praises, you know, they can really speak to the challenges and the culture shift and just the change in, your process that is necessary in order to get progressed, you know, there's some growing that happens. So that's awesome. I'm glad you guys were able to connect. I still haven't heard back from the other company that I was gonna link you guys up with, but I will definitely get them in touch if I do hear back from them. So, the other thing is I sent you guys updated service trade pricing and I wanted to take a little bit of time to run through that real quick have.

ALISHA

2:28 I have not even pulled it up, but let me pull it up. Let's see.

MATT

2:34 And I'll pull it up on my screen as well if that's easier for you.

ALISHA

2:40 I got it here. Here we go.

MATT

2:46 Yeah. So not much has changed here. The only changes are actually for the better for you guys.

--- Pricing ---

MATT

2:54 So we discussed doing a three year deal which again, is very common with our enterprise customers. There's just lots of advantages to doing that. So the have changed to make it a three year. And then you see the amounts have been tripled. Don't be alarmed by that because it's still, the annual rate. And by going with a three year deal, we were able to pretty substantially increase the signing discount. So before, if you remember that was only 3,500, we were able to bump that to 1,350 or 13,500. So essentially, if you do the math that cancels out the five additional Northboundary sales users and even offsets, your accounting integration and investment by about 4,000 dollars. So it'll help out with that as well. So the annual on that, if you do the math, it comes out to about one four, one, four and change.

ALISHA

3:55 Not bad.

MATT

3:56 I thought, so, I told my boss I'm like, hey, these guys aren't just messing around. They're serious about making a change and they're doing it for all the right reasons.

--- Purchase decision ---

MATT

4:03 They want to do a three year deal. What's the best that we can do? So, I was impressed that he didn't give me a hard time. He took, I vouch for you guys and he trusts me. So I was pretty pleased with that.

ALISHA

4:15 Okay.

MATT

4:16 And so the, like I said, the rest of it is the same.

--- Pricing ---

MATT

4:20 So I still got the onboarding one time first year amount. And then of course, this math changes on here again for the better. So the first payment due upfront is half the subscription plus all of the services. And then you guys will have semi annual payments of just, the subscription there.

ALISHA

4:41 Okay. Bye.

MATT

4:44 That sounds good.

ALISHA

4:47 I believe so. Yeah.

MATT

4:49 Awesome. But yeah, like I said, I was pretty impressed that I got this pricing because I think I quoted you guys 110 to 160. And at that time, I didn't know you had all of this sales users on there and I didn't know what the integration pricing was. So I think altogether the annual cost if you break it up into the annual.

--- Pricing ends ---

MATT

5:14 Is about 116 a year. So I thought that was pretty awesome.

ALISHA

5:20 Yeah, that's not bad. Okay?

MATT

5:23 So, the other agreement and so this is one usually I have Robert show his agreements because it's not on service trade paper but I've studied it long enough to understand what all this entails.

--- Pricing ---

MATT

5:35 So again, this is our integration partner. And so he's got the three year term to match ours. And then this is what it's supposed to be. This is technically how is pricing goes? But again, I vouch for you guys to him too, and he was able to match us on the pricing discount. So it's usually this is the amount that you would be paying for how many you guys have and what you're looking for. But he gave that. I think it's over a 30 percent discount to make that 12 K per year. This is the standard implementation fee. And so this basically entails him custom configuring and

mapping all of the information and service trade over to the respective GL codes and account numbers over in Sage, so that everything's landing in the right home.

--- Accounting integrations ---

MATT

6:25 Okay? And then we did talk to him and learn that he has recently developed an integration with paper lists. Now, I don't know paper lists. I don't know how any of that stuff really works. I know he really does that's his world. I don't know if this customer that he developed the integration for was a service trade customer, and I don't know how much that matters because, it sounds like it's kinda more on the Sage side, but I'll have to, we'll dive into that. I already told Robert that we'd like to set up a meeting.

ALISHA

7:00 That's more of what we want to dive into. Also? Like, are we the first customer that this will be an integration with? And how many hiccups do we expect?

MATT

7:10 Yep. So you guys will not be the first customer with the Sage, 300 integration?

ALISHA

7:15 Yeah, we knew that, but the paper lists?

--- Pricing ---

MATT

7:18 Yeah. So, it sounds like you guys, at the least will be the second customer with the pay list integration. And so anyway, this is the additional scope because the pay list would be another custom project for him, coordinating it to you guys accounting system. So this is the amount associated. This is a one time first year amount here. So this is not an annual recurring amount.

--- Pricing ends ---

ALISHA

7:48 Okay.

ALISHA

7:54 Looks good.

MATT

7:56 Okay. Awesome. I was hoping you would agree. I did work hard for this.

ALISHA

8:00 Amish might give you a little trouble later, but I'm in agreement, the type of person he is.

MATT

8:06 Yeah. Well, he's gotta be right when it comes down to financials you got to try. But like I said, I, even outside of sales, I'm not a fan of like the bartering process. Those make me uncomfortable. So whenever I can, I just try to shoot to the best deal that we can offer and help you guys out, right? So that is the pricing you should have that in your inbox. And then the other thing is I added some examples of reports or the different filters that you can use in service rate. Did you get a chance to look at those at all?

ALISHA

8:41 No, not yet.

MATT

8:44 Is, so Jill said you guys were talking about it. Is that more of a Jill thing or is this something that you wanted to know as well? And you had questions about?

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

ALISHA

8:53 We wanted to know what type of reports that like are base reports that are in service trade? Well, like right now with SM, of course, we run the work, open work orders, open purchase orders, and I guess close purchase orders that are that jobs are still open. Like we have all kinds of reports that we run on those levels. So we were just seeing basically where we're at and how many reports would we have to create?

--- Invoicing ---

MATT

9:23 Yeah.

ALISHA

9:26 We also were wondering if service trade lets us do statements or is that just still going to be on a Sage side?

MATT

9:36 Like billing statements?

ALISHA

9:38 Billing statements, yes.

MATT

9:39 Yeah, yeah, that would definitely still be on the Sage side. They're gonna do that best. And so we wanna make sure that they're doing what they were designed to do.

--- Invoicing ends ---

ALISHA

9:47 That's what we figured.

MATT

9:48 Yeah, good question.

ALISHA

9:49 Just don't like our accounting people don't like how they run on that side. So they're like there's a better report?

MATT

9:56 Yeah, service trade improves so much. The one thing it doesn't usually improve is accounting and that's just kind of a bar. Yeah, something that I wanted to do with Jill as well. And we can always, if we get an opportunity, we can still do this with Jill. But the screenshots, are great that's should be better than nothing providing those to you guys. But I can also pull up the service trade account real quick and give you some examples of reports.

--- Purchase decision ---

MATT

10:28 And this is stuff that we've already run through. But I've shown you guys so much. I think a refresher would be helpful.

ALISHA

10:34 I probably to, one thing that I haven't seen yet. I do still kinda wanna see is gonna be the dispatch board and I know you're improving it. So it's not gonna be exactly that but I still kinda wanted to see a little bit of how that ran.

MATT

10:49 That's fair. And, and honestly, I can absolutely do that here too. That only takes a couple of minutes.

ALISHA

10:53 Okay.

MATT

10:54 So starting with reports, as I mentioned, you're so first of all, I don't present it as reporting, but your service dashboard at a base level is already kind of a preconfigured report where we're seeing the list of jobs going on today.

MATT

11:10 We're seeing the overdue stuff that slipped through the cracks on us that we wanna stay on top of. We're seeing upcoming jobs that haven't been scheduled yet. So we wanna stay on top of those. So they don't slip through the cracks, past jobs to be marked complete. This is all the work that needs to be reviewed to find out if we have additional calls to add, call backs, additional services, or if it's just ready to be passed on to billing. And then lastly, we've got the completed jobs that are all ready to be billed out to the customer. So the service dashboard gives you quite a bit, just kinda out of the box. But of course, as I mentioned, we can do custom jobs reports. And when you do this jobs report now, you can choose from all of these different filters.

ALISHA

11:54 Okay. I do remember this.

MATT

11:57 Yup. So depending on what you're looking for, you can get as specific as the company, the location, I wanna see all, the jobs that, you know, Johnny the tech ran last week or in the past couple of days, I wanna see, you know, what division ran these jobs or maybe I just wanna see all of my H back work or all my refrigeration work. You can do it by status which is, you know, scheduled or unscheduled cancelled, scheduled, completed invoiced. But then one of the really cool things is also, I wanna see all jobs where the appointments are complete. So, hey, this is ready to be reviewed and build out. I wanna see all jobs with parts to be ordered.

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

MATT

12:36 What are we waiting on? Maybe parts partially received? So what parts are we still waiting for? Is it time to call the manufacturer or the vendor parts overdue for delivery? But the big one I remember Keith really wanting to key in on is all parts received. So a lot of times you guys will get the parts in, but, you don't really have a good way of having visibility over. Hey, we're just sitting on these jobs when we're ready to go.

--- Accounting integrations ---

ALISHA

12:59 Right. Okay. Option?

MATT

13:05 Ton, yeah, I.

ALISHA

13:07 We just used to SM, like, you don't have a lot of options like they have some basic ones that you go to. And then of course, we built a lot over time, our own Crystal reports and pull it in. But this doesn't look like you really have to build any of that. It's mostly you just have to search it properly.

--- Accounting integrations ends ---

MATT

13:23 Correct? And these filters, like if you're running a common report, you know, like your reports don't change that much day to day, it'll save whatever you filtered last time. So when you just pop in, it's save for each account. So when you pop in there and you're usually running a report on, you know, a certain status or jobs with it'll, produce that every time. But if you want to switch it up, you just click the reset and then type in whatever filters you want.

ALISHA

13:47 Okay. So I think Jill's biggest thing for on her side, what report that she was hoping to have easy access to would be close work orders by sales and profitability of those work orders because we do a financial meeting every month and that's kinda something she puts together and it's not the easiest task that she does the it's like pulling several different reports and kinda combining them.

MATT

14:14 Yup. So here we have the sales person... and then we can go to status to complete it.

ALISHA

14:26 Okay.

MATT

14:27 If I want, I can even go... in, I...

ALISHA

14:31 Yeah, we would want to do the invoice, but if we don't put a salesman in there at all, it'll pull all of them.

MATT

14:36 Yeah, exactly. Should still show your sales people. When you get it in the export file, you can still do your filtering and reorganizing by the sales person.

ALISHA

14:44 Perfect. Okay. That was her question.

MATT

14:49 Okay. Yeah. And so this is just a jobs report. This is going to be super helpful.

MATT

14:54 But keep in mind, you know, another report is like service opportunity. So, for your service managers... again, they wanna see all the work that's upcoming or due and maybe they wanna see for a particular office or division, show me all of my PMS due in the next two months. And maybe I want it to be specific to H vac. I can do that or I can leave it wide open and just grab all my services, but I can do it by vendor location company. And then when I run this report, it's combing through all my customer location pages and it's extracting the list of services that meet my search criteria.

MATT

15:36 I can easily bulk, create hundreds of work orders with all the Rich detail about where it's happening, what services, are need to be done, the full scope of work, any parts and pieces associated with it. It all populates to work orders that are now in your Hopper, ready to send out the text.

--- Customer engagement ---

ALISHA

15:53 Nice.

MATT

15:54 And then same thing with quotes for your sales team, you know. So usually the quoting in service trade is done more for, your pull-through work or the spot quotes as some people call it where your text are just finding repairs out in the field. Usually that's a faster term.

--- Quoting ---

ALISHA

16:08 Around.

MATT

16:09 Templates. Yeah. So I can run a report on quotes and look at my pipeline so I can look at it by quote status, and there's a bunch of different options. So maybe I want to see all the ones that are in draft. Why aren't we sending those out yet? Look at all the rejected ones. Maybe we didn't throw pictures on there. Maybe it was unclear, maybe there's some comments that we can learn from. So there's lots of different filters again, searching by salesperson, it's on here somewhere right here. So I can search that by salesperson, same thing with deficiencies, maybe I don't want to look at quotes, but I wanna look at what are the things we should be quoting, what's our backlog? So, you know, show me all the inoperable ones, what's the status of it, you know, and then what's the resolution? Have we quoted it out? So there's just a ton of versatility and the different filters that you can combine and choose and just very granular and you can quickly drill down into your database.

--- Quoting ends ---

ALISHA

17:05 Okay.

MATT

17:07 And then of course, the same thing with invoices. So here are all the filters you can choose from for invoices.

ALISHA

17:14 Looks super easy to work.

MATT

17:17 I'm glad to hear you say that, it was designed that way and I can tell you when we learned the platform, I think I already mentioned this, but they just threw us in the deep end and just tell us to start using it. And I was actually very impressed with how fast I picked it up because there's hyperlinks everywhere. Everything's spelled out. It's just, it's easy.

ALISHA

17:37 Definitely.

MATT

17:40 Any questions on the reporting?

ALISHA

17:43 No, actually as soon as you pulled it up and I saw the screen, I remembered that from the last time we were just thinking, you know, basic reports that you can only pull from type thing. We're so stuck in, you know, the 18 hundreds.

--- Accounting integrations ---

MATT

18:00 Yeah. It's hard when you've been doing something in a certain way for so long and like that's kind of the lens that you're looking through, but your world is about to get much better and much more expansive. So, and then as I mentioned, any of this stuff can be exported to excel spreadsheets and you even got a few different ways to display the data, in the spreadsheets.

--- Dispatch ---

MATT

18:18 Nice. Okay. So let's take a quick look at the dispatch board. Again. This is a demo account. So I never know what kind of dummy data is in here. So brace your eyes. So, for example, here, you see all these chaotic lines that's because every sales

person on our team has their own individual office and service trade. If you guys have one office, you're not gonna see all this stuff. But if you did have multiple departments that you wanted to kinda keep siloed on the service side, then you'll be able to select those offices and be able to see the technicians associated with it.

ALISHA

18:54 Okay. So, plumbing dispatch and H vac?

MATT

18:57 Exactly. Yeah. That way each dispatcher is, you can just keep track of the lanes and who's supposed to be, where, hey, plumbing job goes down to the plumbing office. So on. And so forth.

ALISHA

19:08 What that said? An SM, whenever we have a job setup, H back and a job setup for plumbing. The way I had to make our dispatch board work for unassigned. We had to put like plumbing unassigned as a employee and then H back unassigned as an employee. Because other than that, everything fell into an unassigned category and then we had to pull it from there. So we just got used to if you're setting up a job, we'll just put like unassigned employee or signed plumbing and unassigned H, back as a column to where we knew what was, what, how does that work on this level?

MATT

19:51 Good question. And as creative as that was for you guys to put together, I think you'll find service trades a much better way. So just to kinda orient yourself with what we're seeing here again, each, your technician has their own swimming Lane that's the schedule for the day. And these blocks are going to represent the jobs that you put on there. So this first and foremost, the dispatch board is going to provide you with visibility. So for example, I can see, you know, that Matt was clocked into this job for it looks like a minute and he was on or has been on site for 56 minutes. So just a live view. I can see if that technician is still on the job and I can actually, I think I was, I'm still clocked into that job. So I'll actually close it out on here. And then in a little bit, you'll be able to see.

ALISHA

20:40 Different color.

--- *Deficiencies* ---

MATT

20:41 Yep, disappointment. It's gonna make me, it's gonna say, hey, you gotta take some pictures. You can come in... that real quick... photo.

MATT

20:59 There. Now, I can clock out. So that should update in a little bit with a green check mark implying that I am done and look even see a camera just popped up because it forced me to take a picture.

--- Tech On-site ---

MATT

21:11 So I can see at the 57 minute mark, Matt took a picture while he was out on site. And if I filled out any documentation, it would show a little document icon up there. So a lot of visibility to see in real time, what your technicians are doing, which also shows me, you know, hey, did they forget to clock in?

--- Dispatch ---

MATT

21:28 Hey, are they stuck on this job? Are they even going to get to their next call? So instead of wondering all that stuff, you can easily see in real time, what they're doing. It's also gonna allow you to see openings or gaps in their schedule. So in case you've got to pull some on assigned jobs to them and let's take a look at that. So before we do, my favorite place to start is actually showing you what it would look like for an incoming call.

ALISHA

21:52 Okay.

MATT

21:53 Say somebody's coming a calling with a demand service. I can just type in a few characters of the customer name and it's gonna pull up a list of the closest matches to what I type there.

--- Recurring maintenance ---

MATT

22:03 So if it's kroger and Houston, I can select them, it's gonna pre fill the customer information, the address, the primary contact. And then over here, I don't have to schedule it from here because there's an easier way to do it, but you can technically do it through here.

--- Assets ---

MATT

22:21 If I knew an estimated duration, I can update that. But here's basically where I put in the problem the customer is describing. So maybe front of the building is getting right now, if they do know what asset or unit they're having issues with, they're actually going to be able to select from the list of assets known at that site. So if they know it's rooftop unit one, I can grab that. If they don't that's fine. I would say something like diagnose repair and add asset while on site. So whether that means associating the service with an existing asset or maybe it's a new customer. So you can just go ahead and create a brand new asset while they're out, they're working.

--- Assets ends ---

ALISHA

23:02 So say we create it without an access to service. And the guy, the technicians out there and it's something we have in there, they can go and select that and change it.

MATT

23:12 Correct. Yep. Absolutely. And the other cool thing is that I don't have to know who this is going to.

--- Dispatch ---

MATT

23:20 So maybe that phone is ringing off the hook and I haven't had a chance to catch my breath. I can just save it, move onto the next call. And then when I'm ready for it, that job is gonna show up in this unassigned bucket right here. So this is where I'm gonna be able to again scan, the calendar, you know, who it makes the most sense to send it to. Looks like Matt has done with this job, but I'm gonna go ahead and send it to Steven because his schedule is wide open. Now when I drag and drop that job down there, two things happen. One, Steven is gonna see that job on his device now, which that's basically his record of truth that becomes his service Bible. That's how he knows what he needs to go through. So now it's gonna show up on his list of jobs for the day. But also, you can set it up so that the technicians are automatically notified. Any time something has been added or removed from their scheduling.

ALISHA

24:08 Nice. Okay. So if that was say at office, would you just pull it down there after setting up the new job? And that's how you determine the unassigned?

MATT

24:22 So that's a great question. Unassigned primarily refers to these incoming calls that we don't know what we're gonna do with.

ALISHA

24:31 Right.

MATT

24:32 Because the next thing I'm gonna show you is actually gonna more directly answer your question. It's called available jobs which is basically unscheduled jobs. Okay? So for example, all of those jobs that we're talking about, we can filter them by call type. So for example, if we want to look at preventative maintenance, that is gonna, we click that and then it displays a preventative maintenance bucket. So now we can see all the jobs that we have available that haven't been scheduled and we can see that they're due, right? But if you wanna go by plumbing... and you're not gonna have all these different options, your account, you're going to be able to clean this up. This is just the demo account. So it has every service line under the sun. Where is my plumbing? Well, I think I went past it, but you get the idea. So I would go ahead and grab there. It is my plumbing bucket, and then that would pull up a plumbing bucket. So I'd know I'd be able to divide my jobs off into their respective service lines

and that's all I would see there. So I've got a plumbing Hopper. I'm just say I'm the plumbing dispatcher then I'm just looking at my plumbing division in that plumbing pile right there. And I'm just dragging and dropping jobs down on the plumbing tax.

--- *Accounting integrations* ---

ALISHA

25:55 Okay.

MATT

25:56 You like it? How does it compare to SMS dispatch board? I haven't really seen much of that one.

ALISHA

26:03 I mean, I've worked in that dispatch board for 15 years. I used to work through S2 K then that, which is, very similar. It works, but you have to work it and which is the same as this.

--- *Access to information* ---

ALISHA

26:17 I mean, if you don't work it, it's not gonna work. So we've had several dispatchers over time that's like it don't work. And I'm like it's not as pretty as this and it's not as user friendly, but it does work if you work it.

MATT

26:31 Yes, yes, no. And that's true.

--- *Paper process* ---

MATT

26:33 And it's like, I talked to you guys in the beginning. You can't just throw money at software and it magically transforms all of your employees to make them super happy and compliant with your ops. It still requires work, but we can at least offer you something a little more intuitive, a little bit more user friendly. Hopefully cut back on some of those headaches and complaint.

ALISHA

26:52 Absolutely. And I think our dispatch board is probably our biggest issue that we've had in hvac for many years like they just refuse to use it. They have all kinds of spreadsheets going on. It's just a big green battle over there with team majors.

MATT

27:09 That...

ALISHA

27:10 Must be. We're trying to solve those problems and get things better instead of having all these emails coming around like this was be scheduled. Why didn't I get scheduled? Why didn't this get ordered?

--- Customer engagement ---

MATT

27:25 Yep.

ALISHA

27:25 I definitely see this tool being able to help us. But I also know that it has to be worked on all levels for it to give us our full... thing. So, but it gives us the opportunity. I mean, we have the tools in front of us. SM, didn't have those tools. It's not that easy, you know? So.

--- Implementation and ongoing support ---

MATT

27:47 I don't know what SMS training looks like, but that's the other cool thing about ServiceTrade is we have the one we've got the onsite training which is on your order, which I think is going to be huge for you guys to be able to quickly adopt it. Everybody be to ask questions and get out in front of those frustrations. But two, we have the online certification courses which everybody will be going through as well. And that's just a fantastic resource even going down the road, you know, for somebody to brush up on the dispatch board or probably one of, the better ways to use it as a new hire. So if you have a lot of turnover with your dispatchers, then it's really easy to get somebody up and running and onboard just by giving them access to the certification course. So.

ALISHA

28:29 I like that.

MATT

28:31 The other cool thing, is as good as this dispatch board is it's about to get a lot better.

--- Dispatch ---

MATT

28:36 So, a couple of the things that they have improved on the dispatch board is one I believe it's called adaptive display. So if I was to get a bigger monitor, this dispatch board would show the same amount of information, but it would just look bigger. So I wouldn't be able to see any more rows on it because it would be proportionatly bigger. But with adaptive display for the new dispatch board, if you have a bigger screen, you will be able to see a lot more information. You'll be able to see 20 texts on a screen versus seeing, you know, three and having to scroll a lot.

ALISHA

29:11 Okay. We do. We both dispatch, we have like a, about a 70 inch TV on our wall. Yep, we normally put the dispatch for on.

MATT

29:21 So then you'd be able to make full use of the adaptive display, which is awesome. You guys got a lot of a lot of balls. You're juggling a lot of plates in the air. The other thing is a lot of people, when I show the dispatch board, the first thing to say is it, does it have a week view or does it have a monthly view? And for the longest time, I've had to say no, it doesn't dispatch boards more about the day to day, which it is. But the new dispatch board is coming with a week view or a month view as well. So you can actually toggle between day, week and month. So kinda look at your work however you really want.

--- Dispatch ends ---

ALISHA

29:54 Nice in certain levels of future work.

MATT

30:00 Yup. Yeah, because it's never. I mean sure the current day may be your focus, but sometimes you gotta do some shuffling and reorganizing and push things out. So it's nice to be able to kinda see what you have in the balance of the week for options to move things around. So backed by popular demand, we go went ahead and implemented those features in, the new dispatch board.

--- Dispatch ---

ALISHA

30:22 Awesome.

MATT

30:23 And then there's some other cool things about how you filter the available jobs. So instead of just doing it by service line or job type, you're going to be able to filter it by things like parts on order and stuff like that. So you're going to be able to see that information right on, the dispatch board as well.

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

ALISHA

30:41 And parts on order basically comes with like open purchase order.

MATT

30:45 Correct. Yep. So if you remember correctly, partsledger, anything that's happening in there with receiving parts or statuses and, all that information is automatically syncing over to service rates. So you don't if you receive a po, you don't

have to go in and update a status and remember to do that. It just automatically updates and becomes available in, your filters and your searches. So it all really works seamlessly together.

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

MATT

31:13 Yeah. Any questions about the dispatch for?

ALISHA

31:16 No... looks great.

MATT

31:20 Awesome. Okay. Well, that's all I really got to show you on that side if you had any other questions on the reporting or anything else?

ALISHA

31:30 No, I think I'm good at the moment.

MATT

31:32 Okay.

ALISHA

31:34 So, I think.

MATT

31:36 I'm sorry, go.

--- Purchase decision ---

ALISHA

31:36 Ahead. I will talk with Jill and amish on, the quotes you sent us. I haven't had a chance to talk with them at all. I'm not sure. I'm sure. Amish looked them over but I don't know where he's at. I will say he wants us, I decided not to meet with BuildOps at all, but let me see what he sent me earlier. I just briefly looked at it. He wants me to meet with... service, tighten, have a demo Tuesday morning.

--- Purchase decision ends ---

MATT

32:08 Okay.

ALISHA

32:09 But he just wants us to roll out somebody else before we jump on board because we haven't done any of that.

MATT

32:15 Yeah, and honestly, I recommend the same because what's the worst that can happen, you reconfirm that you found the best one right out the gate, you know, in fact, I think the contrast between the two will be like that's pretty cool.

--- *Type of work* ---

MATT

32:30 Service tighten is a good piece of software. They got their start in residential. I think they're trying to make their way over to commercial. So that's something that they're advertising, but the things to look for in there. And this is again, not slander, but we know a lot about service tighten.

ALISHA

32:47 Right.

MATT

32:48 We don't consider them much of a competitor just because we're never going to get in a residential and we've got like a 10 year head start on them kinda coming into commercial. But the concept of asset tracking isn't as detailed as ours because that's an infrastructure thing.

--- *Assets* ---

MATT

33:04 You know, you gotta start from the ground up focusing on assets so that's embedded into, your data model. And I think theirs is more focused on the work order, which makes sense because when you're going out and visiting Susie homeowner, you've got one service site. You've got one piece of equipment there, you know, so you can just base it on the work order versus having to keep track of company service site and all the different pieces of equipment there.

--- *Assets ends* ---

MATT

33:30 So that's one area that I think, they have a little ways to go on the quoting aspect. They do a lot of like flat rate pricing and like good, better best type options which is very characteristic of residential. One thing I think that they do stronger than us just being transparent is they have some in app analytics like reporting so that you can get some colorful charts and bar graphs and stuff like that within the platform.

--- *Accounting integrations* ---

MATT

34:01 We're actually, we have that coming down the pipe that's one of our projects right now. Whereas with ours, we currently employ, we leverage Aws or quick site. So using a BI tool like Crystal reports where you can create your own reports that's coming, you know, service trade data is flowing into that.

--- Type of work ---

ALISHA

34:18 So...

MATT

34:19 So, yeah, it's good technology when we have customers come to us that are doing, you know, they want service trade, but they're doing a lot of residential. We actually will recommend service tight because it's just a much better fit for people who are doing a lot of residents.

--- Purchase decision ---

ALISHA

34:30 Okay. Great. That's good to know. Yeah. And I love service trade. We're we're all for it. We just got to check some boxes and move it along.

MATT

34:42 Yeah, absolutely. Understand. And like I said, I think it's a good thing. I want you guys to appreciate more. So what you found by looking at something to be like, okay, actually we did do a good job right off the bat. So I think that helps us honestly when you guys have that demo scheduled, I think you just said?

ALISHA

35:00 Tuesday at nine o'clock okay?

MATT

35:03 Okay. Is amish expecting you guys to do like a super deep dive that will be multiple demos over multiple?

ALISHA

35:11 I don't think so. I think he just kinda wants me to look it over to see if I'm interested in any of the like, I mean, our biggest reason we're trying to do this is because our H vac team, we've had struggles there.

--- Purchase decision ends ---

ALISHA

35:25 And I mean, our plumbing, we run great over here. I mean, we're old school but, we run fine. This will definitely help us. But our H fac team, they just, they need some help. We need to move them along.

MATT

35:39 100 percent. Yeah, no. And that's exactly what we're here for that's what we do.

--- Accounting integrations ---

MATT

35:45 So it's match made in heaven. The other, the other two things I will say about service side now that I think about it is I'm pretty sure kind of like BuildOps and a lot of other platforms you could look at. I don't think they have an integration with Sage 300. Usually, they stick to the most common ones and especially for the residential side that's like Quickbooks. So I think they have a great integration with Quickbooks. But if that's important to you guys, that will be a piece of criteria to run through. We actually have a Dallas we go.

--- Type of work ---

MATT

36:18 And I think Austin don't know if you've heard of lockrage priest or fox commercial services. No. Yeah. So they have a residential division that's on service tighten, and then they use service trade for their commercial division. And they've talked about trying to get everybody on to service tighten because they claim to do commercial as well. But so far, you know, they've been keeping up with their development there just like they're just not there yet. So service trade is the clear winner for commercial and service tighten wins. We wouldn't want to be on the residential side. So that's kinda how the lines, are drawn in the sand there.

ALISHA

36:54 Makes sense. And, we don't do residential. I mean, we only do those for papers.

MATT

36:58 Sure. Yeah. From what we hear from our customers, residential is full of headaches, you know?

ALISHA

37:03 Absolutely. And our guys get so mad when they have to go to, they're like we didn't get into commercial to go to residential.

--- Type of work ends ---

MATT

37:11 Yeah, it's a whole different beast. So, yeah, good for you guys. Commercial commercials work at. So. Okay. Well, so it sounds like next steps, I am working with Robert on our side. He actually responded with some times to talk about the paper

list integration. Let me just pull that up real quick. So you are out the rest of this week. Is that right?

ALISHA

37:39 Till Tuesday?

MATT

37:41 Until Tuesday? Okay?

ALISHA

37:43 I'm probably forced to come into for about a couple of hours tomorrow for a couple of meetings, but, okay.

MATT

37:49 What I won't be bugging you until Tuesday... so he has, all of his times are on Pacific Time. So I'm gonna have to do the math on this, but October 20 or so Pacific Time is two hours ahead of is two hours behind you guys. So he has Tuesday at 10 o'clock Tuesday at 11 o'clock and Tuesday at noon, and then Wednesday, he has... at 10 o'clock and at four o'clock central, all those are.

ALISHA

38:23 See what my schedule looks.

MATT

38:26 Happy to repeat those as well.

ALISHA

38:29 Tuesday is not really a good day for me. I already have the demo and I still have time and everything else that happens that day. So Wednesday is a better option. So, what were the times for Wednesday?

MATT

38:40 10 o'clock and four o'clock...

ALISHA

38:42 10 o'clock yeah, I don't like the four o'clock...

ALISHA

38:51 How long do you think that would be?

MATT

38:53 Really depends on the number of questions you guys have. It could be as short as 30 minutes. I would probably block it just to be safe. I will block it for an hour, but

I don't think it will take that long.

ALISHA

39:05 Okay. If it's just an hour, I can definitely be in that I have work out at noon.

--- *Purchase decision* ---

MATT

39:12 Okay. Yeah. I think this will likely be more of just a conversation him talking you through how it works. He might have some slides to show you guys... but it'll be more of a conversation where you guys can ask your questions and get more information from him on how it works.

--- *Purchase decision ends* ---

ALISHA

39:28 Okay. And if anything, if I can't be in there, it's Jill can do it and she'll be able to have the question she needs for that.

MATT

39:35 Yeah, absolutely.

ALISHA

39:36 And this is with the Sage paper lists.

MATT

39:40 Correct.

ALISHA

39:41 Okay. We actually need Misty on that one. Okay, that works. I'll run it by them to make sure 10 o'clock works.

MATT

39:51 Yes, and I will do the same because let me check with Tania. I'd like her to be on it as well. And... how do I get that?

MATT

40:08 I'll make it work, find a way to make it work. And I've got a... follow up with them. Out of curiosity, what does Wednesday look like for you guys? We were already talking about Wednesday. I'm sorry, no, I'm good for Wednesday. I'm good for Wednesday. Sorry for the confusion. Okay? Wednesday looks very good for me. Okay? 10 o'clock Wednesday looks good for Tania as well and Robert. So I'll send the invite to you, Misty, and Jill, and then you can just follow up with them to confirm that works. So just let me know if it doesn't I can get back with Robert and see what else we have.

ALISHA

40:41 Okay, will do.

MATT

40:44 Awesome. Okay. Well, thank you so much for your time. I appreciate it. And of course, let me know if you have any questions in the meantime, more than happy, to help you out.

ALISHA

40:55 Right. That works. Thank you.

MATT

40:57 Enjoy your time up.

ALISHA

40:59 Well, much need it.

MATT

41:02 Take care.

The End