



ServiceTrade Demo with Haco Electric Company, Inc.

Charlie Riddle with Haco Electric Company, Inc. (1)-2
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Participants

SERVICE TRADE

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SDR

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HACO ELECTRIC COMPANY, INC. (1)-2

Mark Callison

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Transcript

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CHARLIE

0:00 Hi, Mark. How are you?

CHARLIE

0:14 Mark, how are you?

MARK

0:16 Good. How are you?

CHARLIE

0:17 I'm doing well. Thanks for asking. I'm sure Thursday going so far? Yeah.

MARK

0:24 How about yours?

CHARLIE

0:26 Compliant? We've had some pretty decent weather here in North Carolina the past week. So I've been taking advantage of it, but like thanks for joining anyone else on your team going to be joining us here?

MARK

0:39 No, no.

CHARLIE

0:41 Okay. Mark. What is your role over there?

MARK

0:47 Service manager?

CHARLIE

0:49 Okay. Gotcha. Well, Mark, let's jump in. My name is Charlie rental. I'm the territory manager here at service trade for the central United States. I work with customers in electrical H, vac, mechanical, fire, life, safety, all that good stuff.

--- Purchase decision ---

CHARLIE

1:06 Kind of how I like to run these things. I want to spend the first little bit, get to know you. I want to understand, you know, hey go. I want to understand your... your processes as they are now and kind of where you're hoping they could be, I'll give you some high level context for what service trade is all about. And then we'll dive into the platform itself. How does that sound?

MARK

1:26 That sounds good?

CHARLIE

1:28 Perfect. Well, I wanna get around what I like to call stupid questions and I know you spoke with and she was gonna telling me what you guys got going on but I wanna... I wanna dive in a little bit. So, right now, and I'm sorry, is it Haco, we're hacker?

--- *Type of work* ---

MARK

1:43 Hey, Kim.

CHARLIE

1:44 Nicole. Okay. Got it. Right. You guys are doing primarily construction right now, but want to grow and bolster your service department. Is that right?

MARK

1:54 Yeah, more or less. Yeah.

CHARLIE

1:57 Okay. What's the, what's holding you back right now?

MARK

2:07 Really? That's almost Mac, I don't know staffing. Yeah, we had the construction jobs we do, most of them are negotiated learning the jobs.

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

MARK

2:24 So we have certain customers that basically put us on all of their jobs and we just our service part and basically is to take care of them at this point. So... just with how busy we are and... and our labor staffing at the moment and it just, we just focus on our current customers and keep building those relationships and... and reaching out and trying to be competitive, you know, with those smaller companies or the larger companies, it just make a living out of going out and change it out, people, ceiling fans and this and that.

--- *Type of work* ---

CHARLIE

3:07 Okay. So what you're saying is like right now, you're... you're... you're just working on the... the customers that the... the construction department brings in.

--- *Accounting integrations* ---

CHARLIE

3:18 But you're looking to widen your customer base and have a more like independent service for?

MARK

3:24 Yeah. Yeah. That would be nice. Yep. Yep.

CHARLIE

3:29 How many guys do you have in your, on your service team right now out in the field?

--- *Pricing* ---

MARK

3:36 I always just say two. And our service department is different. We consider anything service that is 500 hours or smaller. So it can be a 30 minute job or it can be a 500, our job. We tend to keep our two service electricians busy with smaller jobs that are 500 hours or less because you're not there all the time.

--- *Type of work* ---

MARK

3:58 And so, you know, we do our service calls during and they're bigger projects. We don't typically run enough service work for multiple guys that 40 hours where the service. So that's why we have it set up that way too, I guess is the short answer.

CHARLIE

4:17 Okay. Like in a perfect world, you'd... you'd have 500 hours for a service call that's a lot?

MARK

4:24 Yeah.

CHARLIE

4:25 I think that's...

MARK

4:26 Construction.

CHARLIE

4:27 Search, yeah. And I think you service trade would... would call that construction. I think, you know something I'll tell you maybe a good place to stop here and set some expectations. Service trade is... is designed specifically for that service workflow. If you'd come in here and said, hey, we're all construction, we have no interest to grow or service. Probably, I would tell you that we're not a good fit. You know, our strength is managing lots of small drops throughout the day throughout the week with text one around as opposed to like steering that slow moving ship of larger project work that can last a week or more, if that makes sense.

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

CHARLIE

5:03 Okay? In a perfect world, how do you want your service department or function? And I think that's a big old question. I understand you, but it sounded like there was some hesitation there with the 500 hour or less like an appropriate quote. Your service guys would just be doing lots of smaller quick jobs. Is that right?

--- *Accounting integrations* ---

MARK

5:20 Yeah.

CHARLIE

5:24 What are you guys using for software right now? And I mentioned, you know, Microsoft teams and excel. Is that right? Without counting... Quickbooks? Okay? Do you know if that's online or desktop?

MARK

5:47 I would... I would think it's desktop, but I'm not 100 percent sure.

CHARLIE

5:50 Yeah, no worries... no worries.

--- *Accounting integrations ends* ---

CHARLIE

5:54 Okay. Yeah. Tell me in and I said that you had previously looked at service, was it tightened or fusion one of those two and a couple of platforms, but it didn't hit the Mark. Can you... can you tell me what happened there?

MARK

6:08 So, I've talked to you about three other companies and... two of them were just way more than I was willing to spend.

--- Purchase decision ---

MARK

6:21 And then one of them was sounded interesting, but didn't think that... they were a good fit. We were a good fit for their product, that we would get total value for their product... BuildOps, Bill, BuildOps BuildOps, ServiceTitan in... in like FieldEdge.

--- ST app contracts and pricing ---

CHARLIE

6:47 You mentioned price there. It sounds like you're price is a, is an important factor for you. What... what kind of budget have you set aside for something like that?

MARK

6:57 Honestly, haven't set aside a budget issue if it's... you know... it's hard to just because the way I'd want it set up is that... I have two people that we call service, but anybody come on a service call for us.

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

MARK

7:20 We just take care of who needs to be taken care of. So you can be on a 14,000 our job and close to something that needs to be done. It would take an hour.

--- Pricing ---

MARK

7:28 Well, you can take an hour out of that 14,000, our job to go and take care of a customer. So, you know, they want licensing per individual. And then you have a certain license for your... your office staff. And so, you know, we have myself and two other project managers, a couple of owners and they're... they're they all need access to it because we all... we all take calls and we all, you know, develop service calls essentially.

--- Paper process ---

MARK

7:59 So... it's just... I don't... I don't really know. I don't have budget people just contact me and I'm always willing to listen to see some does fit because, you know, oftentimes I'm just running down paperwork, you know, I gotta run out paperwork. I gotta go out and give them more orders that have all the information. And then I gotta go run out and get it from him. Again. There's no flow. It's slow. It's a slow process. It takes time and everybody's day to just do the paperwork part of it.

--- Paper process ends ---

MARK

8:31 And so we're... we're all interested in finding better way. But at the end of the day, like I said, we don't we're not running, you know, 40 service calls a week, you know, are running 10 between two. Yes. So.

CHARLIE

8:47 Okay. Well, I generally don't like to talk price this early, but I think it's good just to make sure that we're... we're on the same page here.

--- Pricing ---

CHARLIE

8:58 I don't wanna waste your time or our pricing structure is dictated by the number of texts you?

MARK

9:02 Yes.

CHARLIE

9:03 You have unlimited office users, unlimited admin users... you know, our packages start at five tax. So I think you could have two of those tech licenses be your two main guys and then you can use those other three... as kind of like a miscellaneous.

--- Pricing ends ---

CHARLIE

9:21 Now, if... if there's like a particular guy who is doing, you know, a service picks up more and more calls regularly as opposed to like once a month or something, I think we would need to dedicate one of those, but I... I think right now you've got a little bit of room to grow or to, for someone or the miscellaneous late just hop on a service call.

--- Pricing ---

CHARLIE

9:43 But, you know, roughly, I definitely wanna spend more time with you and I can give you a specific at the end of this, but I want to set your expectations. You know, your first year is looking at 6,300 bucks with service trade every year. After that is going to be roughly 48. Is that anywhere in the ballpark for you?

--- Paper process ---

MARK

10:00 For a year?

CHARLIE

10:01 Correct.

MARK

10:03 Yeah, that's not unreasonable. Doesn't sound like.

CHARLIE

10:07 Okay... perfect... perfect. Alright. Tell me more about you said putting down paperwork, you know, I wanna dig in there. Like what is the flow of paper right now? What frustrations do you have? And what were you looking to get? Like, you know, fixed?

MARK

10:26 So, we... we take a call and all of our, all of our electricians just for change orders and stuff, have an invoice book. And so basically, we've created a form on excel that we can just fill out. And we gotta get that too and electricians hands, so they know where to go when they, they're all that stuff.

--- Paper process ends ---

CHARLIE

10:48 Okay. And.

MARK

10:49 So, not only do I gotta get the... get the information but I gotta get to the electrician, I have one of my two service guys on teams and it's just we're just trying it out where I can upload this syllable form in teams and I'll notify them.

--- Paper process ---

MARK

11:04 They have a form and then they can do the work and they can fill out the form that I'm gonna do is print handed to been into the billing and that's working okay. But like I said, I only got one guy doing. So everybody else have to find where they're at in the world, get them paper on their hand. They go run the service call. They fill out their paperwork on a different piece of paper. And then I gotta go get all that stuff to handyman to get billed. So there's just a lot of me driving around or having the electricians drive around, dropping off paperwork, stuff like that... perfect world we would have that would they... would, they would just have a work order, they can fill it out and then we could build it from there, you know?

CHARLIE

11:44 How much time a week? I'm curious. Do you feel like you spend just driving around trying to get paperwork or give out tickets?

MARK

11:53 I've you know, I've never even... I couldn't tell you. It depends on the week. It's a busy week, a lot if it's not cool. What I typically do though is... is I gotta drive around to give out the work orders. And so from handy, I got work order, I see if he has any, and if it's a situation where I can hand them out multiple work quarters and say here and you're going to this one Monday, you're gonna do this one Wednesday or whatever it is?

CHARLIE

12:18 You...

MARK

12:18 Know, a lot of times I'll pick everything up at the end of the week, you know, I try to hit every day on Fridays but I couldn't give you a number but it's just more than necessary.

CHARLIE

12:25 Yeah. Okay. Man. I'm... I'm having PTSD here at my... my background. I was actually service manager for a diesel engine shop. I work for a big dealership network in Virginia and I had six mobile tests and my whole thought process was like these guys do not need to be traveling back and forth to the shop that needs to be out generating billable hours. So, one of the things that I had to do was drag them down given paperwork or wait till the beginning of the week or the end of the week till they could come back to the shop and gave me there. Isn't it just, it was such a nightmare in terms of like bottleneck or like discrepancies on the tickets.

MARK

13:00 Yeah.

CHARLIE

13:01 Like, do you ever like when you gotta take it back to, you ever find that it's missing information or you're not quite sure what they did or not quite sure how to build out or what parts they used?

MARK

13:09 Absolutely. Yeah. There's I get... I get back and check them in the office and do I'm calling them up? Yeah, you know, so giving better detail here or... or, you know, you didn't have to use this is or lift or, you know, they're yeah, there's discrepancies. Do we have to figure out?

CHARLIE

13:26 Okay. Alright. So communication with texts and streamlining of information and... and paperwork seems to be a big priority. What else? I've generally, I work with companies that are on paper processes all the time and I've got some things in my mind that I think are recurring patterns, but I want to, instead of me saying I wanna, I want to hear what you specifically are experiencing.

MARK

13:50 I mean, that's... that's basically the... the big... the big issue.

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

MARK

13:54 We have some internal issues that I don't... I don't think you guys necessarily help with like standardizing truck stock and finding ways to keep truck stock, you know... make sure we have parse and stuff like that. That's I don't think what you guys do that's the only other role for all headline.

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

MARK

14:13 We're trying to remove this is just like you said we want to, we want to create more billable hours. We don't want people going to supply houses. We don't want people into here to pick up or drop off paperwork. You know, we want them either on their... their bigger jobs in between there small little service calls or on those servers calls.

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

CHARLIE

14:31 Okay. So are you? So service trade it? I think it's interesting that you mentioned inventory, you're... you're you want to know an easy way to manage that. So the text aren't wasting time or like I need this small little widget or this gasket ran out yesterday. I need to go buy one, right? You know, service trade is gonna get you a halfway there, you know. So the way I like to say does that we're really good at tracking consumption. So with the mobile app, your text can all of a sudden pull from a list of your parts from your system and add it to the ticket. And then at the end of the week, you can run consumption reports to see how many you're using and where it came from. And then, so you can kinda judge your... your levels after that. Okay. Tell me how often do you guys quote and your service department? Yeah.

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

CHARLIE

15:22 And in my mind, there's like two two places in the workflow where you would quote. One is at the beginning before even go out there. Or... or the second was like after a service call or in the middle, I'm sorry, have a service call, you know, attack identifies an issue.

--- *Quoting* ---

CHARLIE

15:36 We gotta get this quoted out, gotta get it approved, and then you can perform the repair. How often are you guys doing that?

MARK

15:43 We do a lot of it. I do most of the quoting. We don't really like our electricians, don't do any of the quote and they might... they might call us and say, hey, you know, current process job.

--- Quoting ends ---

MARK

15:55 We found this and to... fix this the right way, it's going to need this... this and... this. And then I get with the customer and give them a price or... or update them on the issue. So, at this point... yeah, Monday, other people, part of their system is... is so that our electricians can get posted the failed and... and, you know, Sunday and we'd like to be there. But right now it's... it's myself or Kenny or band or Nick providing the quote and... and... and ensuring that if there's person needed and then we have those parts ordered and ready and for pick up by electrician or whatever. But... not all of our service where a lot of our service first talk to her. I'll be honest with you because they are customers that we're almost like call. We have special pricing setup for them. And so we don't ever have to give them a price. They say, you know, this... this address with this office space has some balanced out. We need to go replace ballasts familiar there and make sure all the... all the lamps or the same color, you know. So we just go do it when they need us in there or, you know, the call and say this tenant in this building and using outlook get in for an extra lamp. And so we run, we don't they don't ever asks what the price of that is that we just went out there and doing?

CHARLIE

17:23 Yeah. Okay.

MARK

17:24 Hello. So we also have businesses that call us exclusively for a lot of our service work and they do ask for surprises. So, and then I just run out there, look at the job, put together pricing, give it to him and say, when do you want us to do it? And then we go to it, but it's more for their budgeting and for their process approval.

--- Type of work ---

CHARLIE

17:45 Okay. Are you guys, I saw on your website? You guys do both residential and commercial? What's your mixed, you lean more one way than the other?

MARK

17:58 Yeah, we're... we're really almost exclusively commercial or residential work is for our commercial customers, you know, essentially, and we're not against doing. So. I guess that's not true. We do it. We do a lot of service, change out, but we don't we're not, we don't really, we don't really get calls to change out a ceiling fan.

CHARLIE

18:21 Sure.

MARK

18:23 We don't get those calls, you know, to where we can get her electrician in there and be in and, you know, let them try to upsell.

--- Type of work ends ---

MARK

18:30 You know, we noticed that this... this switches a different color than the Alice. Would you like us to fix that for you? Or the smoke detector is be thing we'd like us to fix out for here. This is that we don't... we don't try to. We don't really get into residential service calls, trying to upsell anything.

--- Type of work ---

MARK

18:46 You know, we don't really at this point and go after I wanna I'm residential calls because it's hard to make money Adam.

CHARLIE

18:53 Yeah. And it's also hard to... to build a relationship with that... with that customer. So, I'm... I'm glad you said that service trade is built specifically for commercial service providers.

--- Assets ---

CHARLIE

19:02 For a couple of reasons. One, we have a very robust way that we track your history. We track your customers, your repair history, your asset history, all that good stuff which may not be as valuable to those residential service providers because they only see them once every two years.

--- Recurring maintenance ---

CHARLIE

19:18 Also, do we make a big distinction between built to in ship to meaning you might have one company that you service, but you have multiple locations that you service underneath that one umbrella company. This is that something you guys do?

MARK

19:31 We have a couple of customers like that. For example, one of our big customers, they're... they're calling Hampton enterprises. And so they're just property managers for office, you know, offices. And so, yeah, they call us and, you know, whether it's the way very location Lincoln shire, you know, whatever location... that is. Say, you

know, 1,650 in Lincoln shire needs an outlet, get in... in some balance replace. Yeah. So we do have some customers that have obligations.

--- Purchase decision ---

CHARLIE

20:05 Okay. Lastly, you know, it sounds like this... this is something you've been actively, you know, researching and looking to make a change here for a while. You know, in a perfect world, when are you looking to make a change? You know, if service trade checks all the boxes for you? Is this is if this is something that you're looking to make a change like in the next few weeks or is this kind of on the horizon type... type plan?

MARK

20:33 I don't really have a timeframe... so.

MARK

20:42 I don't really have a timeframe. I'm just, I haven't actively searched reached out tenant 10, you know, service trade or any of these other companies that they reached out to me. And I... I understand the benefit of them because I work for other companies that had similar stuff. And so I... I understand... the usefulness of them. However, you know, when I joined this company, they have good processes in place is they do have holes, obviously let everything works pretty good here.

--- Paper process ---

MARK

21:16 And we got a lotta good people. And so it's not a rush. Hi, this is... is, it's mostly my time that is wasted. We... we were able too quickly correct the... the service tech, spending a lot of time under shop instead of under a job.

MARK

21:38 You know, there's still a lot of efficiencies there.

--- Paper process ends ---

MARK

21:41 So there's still a lot of ways to make it more efficient. And so I am always happy to... to listen to these two people and see how people to help. I don't have a timeframe because I haven't actually, I haven't actively been searching for it. It's just been coming to me.

CHARLIE

21:57 Gotcha. Gotcha. Okay. Well, let's jump in Mark. Can you see my screen? It has my name and the top left and has service trade on the bottom.

MARK

22:09 Yep.

CHARLIE

22:12 We service trying to give you some background... background. It's been a rough morning. We started in the fire life safety industry. Our... our CEO and cto came from a fire life safety company and made service trade specifically for commercial service providers. After about a year of... of sticking with the fire life safety, we realize the workflows very similar in that sense, branched out into electrical H, back refrigeration, all that good stuff.

--- *Type of work* ---

CHARLIE

22:40 We work with companies as small as two or three text, just like you guys all the way up to the big boys with three, four or 500 times here's. A handful of some of our larger mechanical contractors that we work with. So we or a service management platform, we're going to handle and manage the entire scope of your service workflow starting from scheduling and dispatching, performing the job inspections, quoting service trade is then going to spit out a pro forma invoice.

--- *Invoicing* ---

CHARLIE

23:07 And at that point, Quickbooks is gonna take over. Okay, you can hit a button and... and have the service trade invoice automatically generate an invoice in Quickbooks. And then at that point, Quickbooks is gonna continue to manager ap, our payroll taxes. All that good stuff makes sense?

MARK

23:24 Yep.

--- *Customer engagement* ---

CHARLIE

23:25 So, we are a service management platform, but we also consider ourselves to be a customer engagement platform. So much Headspace in service trade is designed around communicating with your customers, setting expectations, providing transparency, you know, our... our thought processes that too often in the service industry, the only time the customers engaged with is at the beginning when they have a problem, and at the end when you're asking them for money.

--- *Customer engagement ends* ---

CHARLIE

23:48 And we don't think that's a happy customer experience or mission statement here at service trade is that we work with commercial service providers to help make

you guys more valuable to your customers. You know, we kind of touched on it a little bit, but do you guys have specific growth goals that you're acting on right now for your service side?

--- *Type of work* ---

MARK

24:07 After the service side... and obviously, because of where we consider service, I also on construction, I'm also project manager. That side of the business has been growing quite a bit.

CHARLIE

24:23 Okay. But I mean, obviously you guys want to make more money. It sounds like you want to broaden your customer base.

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

CHARLIE

24:29 Sounds like you would, right? You would like a few more dedicated text. You would like enough work to support all those tax or am I right?

MARK

24:36 Absolutely.

CHARLIE

24:39 Perfect. That's really where service trade or indoor stripes. Yes, we work with the big boys with 500 tests, but the vast majority of our customers are in that two to 20 tack range and we've worked with them to solidify some processes forum help them grow and then provide processes that will grow and scale with them.

--- *Customer engagement* ---

CHARLIE

24:57 So I want to give you a little snapshot a couple of highlights of stuff that we're about to see. Keep in mind that all of this stuff is designed around communicating with the customer. Have you ordered anything online recently from Amazon prime?

MARK

25:12 Well, I've order from Amazon. I don't know. So they use Amazon prime, but.

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

CHARLIE

25:16 Gotcha. Gotcha. Well, it's... it's a similar mindset you order something from Amazon, right? To give you a notification when the order is going through, they give

you a notification when it's been picked, that give you a notification when it's on the way. And they give you notifications when it has arrived.

--- Customer engagement ---

CHARLIE

25:29 And we've taken that mindset of that visibility and transparency and applied it to your service operations. Okay? So something that's super small, but something that we think goes a long way isn't in route notification. Your text will now be able to send an email notification to your customers and saying, hey, on the way EPA is half an hour. Okay. Another great thing is interactive quotes. We have a very... very strong quoting workflow. We think quoting is the bridge between service and maintenance, which is relatively small margins and repairs, which is the relatively larger margins. Okay? This is a big way we're gonna help you guys drive revenue. We make it super easy for a tech to identify an issue, report that back you or a quote or get that quote made and get it approved. Lastly, we have an interactive invoice. A lot of times this industry, the customer doesn't see the value of your work. They don't know where all this money is going.

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

CHARLIE

26:24 It's not quite as tangible. Obviously, if you guys are... are doing some like ceiling fans or stuff like that it... that, it would be. But a lot of times the customer doesn't see where their money is going. So we've got an interactive invoice that we can send you or that you can send your customers. We call it an invoice link. So not only is it going to have an itemized breakdown of what you did, but it's going to have a report that's automatically generated while you performed this job of all the documents, all the notes, all the pictures, all the... the... the notices that you need to give them... here.

--- Customer engagement ---

CHARLIE

26:58 At the end of the day, we're here to make you more money. I think the stat that I'm most proud of is that after working with service trade for a year, our customers on average see an increase in service revenue. 23 point four percent that's not a made up number that actual data from our customers. We're going to help you drive revenue in two main ways. The first one is quoting, like I was saying, we are a big proponent. The quoting is the bridge between small margins and large orders, but operational efficiency number to the feedback that we've gotten from our customers is that after using service trade, their texts for each tech is able to get to on average three more jobs a week now, I'm not sure what's your average revenue per job is, but you do the math.

--- Customer engagement ends ---

CHARLIE

27:37 Okay... okay? Any questions on anything we've covered so far before we jump into the platform? Nope. I've made a job for us to act out here today. But before I do that, I want to show you a couple of things that I think would help you in particular.

--- Paper process ---

CHARLIE

27:54 Yeah, one of the first things you said was like paperwork in admin stuff. You're just inundated with it. Are you the guy, are you the bottleneck with like it seems just like every scrap paper or like admin process has to flow through your desk?

MARK

28:08 Yes.

CHARLIE

28:11 Okay. I think you're gonna like this.

--- Paper process ends ---

CHARLIE

28:13 I pulled up our dashboard. This is the first thing you're gonna see when you log into service trade as an office user, spending a few minutes on this page each morning might give you a good idea of where you need to spend time today. In terms of an admin sense.

--- Dispatch ---

CHARLIE

28:26 Okay? It's full of buckets or safety nets that catch tickets in various stages of that service workflow. So, at the top here's, our daily schedule here's. Everything we got going on today. You can get a quick snapshot of how much movement you got on your service side right here. We have overdo jobs without appointments and actually, let me stop and ask you. Do you guys do recurring service or like service contracts, anything like that with your customers?

MARK

28:51 Don't?

CHARLIE

28:53 Is that something you want to get into? Yeah. Okay. The reason I ask is because one of the, you know, quoting might be our strongest feature.

--- Dispatch ends ---

CHARLIE

29:04 Probably our second strongest feature is how we help our customers manage service intervals. We think capturing a service agreement with regularly scheduled maintenance is a great way to build a relationship. Great way to lead to upsells over

the long term. Okay. So there's a lot of functionality in service designed around managing those recurring service animals.

--- Dispatch ---

CHARLIE

29:25 Here's. One way this job or this bucket right here's, for overdo jobs for these jobs were do last month and we have not done that. You might want to get somebody to do it. These, this bucket right here is on the other side of that coin, helps you be proactive saying, hey, these jobs are doing the next two weeks, would probably want to get somebody to knock these out.

--- Tech On-site ---

CHARLIE

29:43 Now, coming down to the bottom, another great bucket, completed jobs to be invoiced, these jobs, the technicians had said, hey, my job is done. Work is complete. I've done all my paperwork. We just need to get an invoice made and get it sent out to the customer. Okay?

--- Tech On-site ends ---

CHARLIE

29:57 Any questions on this page, Mark? Do you feel like this would alleviate any of your pain or frustration at all?

MARK

30:10 Yeah. I mean, we don't really have service agreements like... like we talked about. So I don't know... in... in because we don't really. Yeah. I mean.

CHARLIE

30:24 Nope, no worries, man. I didn't... didn't mean to put you on the spot. I was just curious to hear what you were thinking. Let's... let's... let's keep rolling here. Alright. Let's... let's let me show you the data model and I think that's a buzzword but it's what I like to call it.

--- Assets ---

CHARLIE

30:44 We make the distinction service trade when... when storing your history, what's join your customer history, your repair history, your asset history, we make the distinction between the Bill to the ship to like I was saying. So I'm gonna go to Texas roadhouse. I think this is a good one to check out.

--- Recurring maintenance ---

CHARLIE

31:03 Here is the overarching company. The Bill to who's paying the bills? Okay? Now, look at this page. The information on this page is pretty bare bones that's by design. But when we click on locations right here here are all the physical locations that we actually service underneath this customer. And guess what each one of these locations has different contact, people, different needs, different assets that you service, different jobs you provide. Okay? So I'm gonna click on one for Austin, Texas. We're going to see we've got a lot of great information here that we can look into... if I click on the jobs tab as soon as this page loads here... had the joys of working from home, here.

--- Assets ---

CHARLIE

31:44 We go... here are all our jobs are tickets that we have ever had open on this one location. We can click into any one of these, go into the ticket, see the notes, the pictures, the documents, all that great stuff... here or assets. And when I use the term asset and service trade, it's like a piece of customer equipment that you've service. So it might be an electrical panel that might be a ceiling fan. What are some of like your bread and butter type electrical work that you guys do?

--- Assets ends ---

MARK

32:14 Yeah. I mean... it's a lot of... Alice change out to a lot of... adding circuits because equipments getting added... you know, pull eyes... you know, we do by you to say texture and ask one of our customers is apple these, and so that heat lamps and... and... there's I mean electricals, pretty bare bones.

--- Assets ---

MARK

32:46 You have Alex, you know, circuits having flights, those lines have ballast. I mean, it's pretty simple. I mean... we don't really work on equipment per SE. We supply power to.

CHARLIE

32:59 Man gotcha... gotcha. So if... if you wanted to, you could track those heat lamps or those battles right here and input an asset for it. And all of a sudden, you can track every job that you've had on it or if you would rather not, you can just track all the jobs at a... at a specific location. Okay? Now, let's actually go out and per form a job here. Okay. I've got one.

--- Recurring maintenance ---

CHARLIE

33:24 I've got a, an electrical panel that we were gonna try to keep it kind of simple here. Here's. Our job page notice that we've got the distinction between the Bill to the ship to at the top. Charlotte mecklenburg schools is our build too. Old. Providence elementary is where we're actually performing the work.

--- Recurring maintenance ends ---

CHARLIE

33:41 Coming down here's. The description of what we need to perform here's. When it's scheduled 11 am today. This is Eastern Time, you would see central. When you logged in on the right, we can see what technician is assigned. In this case myself. We can always add more time.

--- Quote templates ---

CHARLIE

33:56 So if you like coming down, you can create rules whenever, if you have a lot of similar jobs, like you find yourself going on some repetitive stuff, you can set rules around whenever you create this type of job. These certain items will pop up whether it be a labor line or a trip charge or a flat rate fee, if it's time and materials, you can go ahead and populate it with a couple of hours of labor in some parts that, you know, you're gonna need.

--- ST app contracts and pricing ---

CHARLIE

34:22 So for this job, we had a couple of items automatically pop up when I created that we had a labor line, another labor line. And I think this is just a flat rate fee, but... let's... let's... let's add a cost to that. We'll... we'll call that 100 bucks.

--- Access to information ---

CHARLIE

34:37 Again. This is not meant to restrict. You just meant to save you time on the admin side. Yeah. Now, let's jump out to the field and perform this job. Can you see me? I've switched over to my phone view. Yep. I can see it. Perfect. So I'm using a Sam's galaxy phone.

--- Tech On-site ---

CHARLIE

34:54 Any iPhone or a smartphone will work. Any I pad or tablet will work just as well. Okay. Take a look at the orange band at the bottom. You can see as a tech, I'm clocked in and route. Meaning I'm on my way. This is where I sent you that in round notification about 45 minutes ago. Did you get that added? Perfect. That's exactly what it would look like for your customers. And really the first instance of customer engagement, we're setting expectations for the customer. I'm gonna clock. Out of being in route and I'm gonna click in to being on site meaning I'm here, I'm ready to perform my work.

--- Assets ---

CHARLIE

35:27 Now take a look at these nine squares here's. The hump of where your text are going to be perform and their jobs, click on service. I can see what I'm out here to perform. Okay? If I click on assets, I can click into if there's ever any like history with a particular asset like you were saying, they will be able to click into that history or see some information about that.

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

CHARLIE

35:46 If you guys had paperwork or... or specific info on specs, when I click on items, I think this one's going to be important for you... you were saying it's... it's trouble to keep track of your parts on the truck. So notice we can already see the three items that we saw in the office that automatically populated, but let's go in and add new.

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

CHARLIE

36:08 I'm going to search for a widget here. Keep it super simple. Once I do, I can say how much do they cost? That... that burden is ultimately going to be on the office? But the... the tech has a chance here to... to... to say like a special if they went to a third party vendor or parts out the parts warehouse and picked it up. We used it today, but I think what's gonna interest you the most is items source down here at the bottom, we can say where we got this. Did we get this from the warehouse? Did we get this from a truck? Did we get this from a third party... party vendor?

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

CHARLIE

36:39 Actually? Let me ask you how often are you guys going out to that third party... party vendor to pick up stuff mid... mid job?

MARK

36:48 Well, a lot... honestly.

CHARLIE

36:54 So, for example, I'm I click on parts vendor right here, say we got this widget from... from some... some warehouse. You can upload some information about your most common parks vendors. And then your text can pick it from the dropdown list. They might say we got it from abc parts. The po number that I gave them was one, two three four or five. And then maybe we didn't pick it up. Maybe we just delivered it here. And I just want to put a notation at this part is on order. And then all of a sudden, you can run reports and track your jobs based on which ones are stalled out due to parts on order reports delivered. Okay. But for us, we're going to put delivered and we used it today.

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

CHARLIE

37:31 Now, that part is going to be right here. And then at the end of the day or at the end of the week, you can run a report and see, hey, we use 10 widgets from our truck today. We need to order more where we ordered. We individually purchase 10 widgets from this part's vendor. We might want to go ahead and buy some in bulk and just stop our guys up. Okay? Is... is this going to help you out at all with your... your parts? You know, inventory problem?

MARK

37:58 Hello, our biggest inventory problem is none of our bands are standardized with... with the material list of stock items. So one Van might have X number of this type of Dallas and the other advantage zero. And so, you know, we don't... we don't really keep much of anything from breakers. And so when we go to a job and finally have a bad breaker, we gotta figure out where breaker is. We gotta figure out which distributor hasn't and we get don't get it come back. So that's kind of when I'm... when I'm speaking about as far as our stock issues... you know, we don't keep, we don't have us. So we don't have our own warehouse, full parts here. We, I mean, we have left parsed from jobs. But as far as the service items that we need like lamps, we don't carry lamps and attracts because we just find that they just get broken sweet. So that's something that we do in depth always going to display S for. But just like Dallas, you know, we don't have a number of Dallas we keep on the trucks or what types of balance we keep on the truck. Same thing with breakers. You know, we may try to keep things like flex and looking to take some of that on the truck when they run out, you know, name.

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

MARK

39:08 There's... there's no process in place to say, hey, I need to put this back on the trucks and they get to a job and say anymore flash, but I'll at least in the outer banks files. So those... those are kind of our internal.

CHARLIE

39:17 We gotta work on... I think... I think part of that is going to be there.

--- Quote templates ---

CHARLIE

39:23 Let me... let me ask you this. Do you guys have like a standardized? And maybe this is what you were saying, but do you have a standardized list of like labor lines and parts that you guys use? Or is it all just kinda shooting from the hip?

--- ST app contracts and pricing ---

MARK

39:36 As well. I mean like a labor costs like what we charge flavor?

CHARLIE

39:41 Yeah. So what... so what I'm coming from is like one of the things that service trade is going to do during like the onboarding phase is if you have a standardized list of all your items that you want to show up on a job, a quote or an invoice, whether it's like a trip, charge a labor line report, we can take that list in an excel format in bulk and then upload it into service trade.

--- *Quote templates* ---

CHARLIE

40:02 So when... when your texture on this screen searching for an item to add, they're going to be searching from your import list. Does that make sense?

MARK

40:12 Yeah... yeah. We, I mean, we have... I think it makes sense. So we... we do have a couple of jobs that have a price for example, to cut in an outlet.

--- *Pricing* ---

MARK

40:28 We just have priced at 250 bucks... and that's clean labor and parts for so many feet of flex. I forget where the flex we're gonna target more. But then, you know, I can or the text can say, you know, you want us to get an alley and we have a drop ceiling. So assuming there's a box close, you know, we can do it 250 bucks battle includes 10 feet of flex. We have to do 15 feet reflection on pipe is going to be extra.

CHARLIE

40:56 Interesting. Okay.

MARK

40:59 And because prices fluctuate especially right now, so much... we don't really... we can if we have a set price or labor, you know, if it's a, if it's... nice flavor.

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

MARK

41:16 Most service labor is like 85 dollars an hour. You know, we do have special pricing for some certain customers. So that might change depending on the customer, but our general pricing for Labor Day, 85 dollars. But because, you know, the supply house gonna charge us this price, if we have to go there to get parts in this price quote, unquote charged another price, we base our pricing off invoices, and we just Mark up those parts, you know, multiplier is like one point two.

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

MARK

41:42 So retargeting, we basically charge him at a 20 percent margin. Pars, really do it depending on where we get into parts, you know, and we basically just get the parts to our file since closes. So we're not running across town. We're just, we're into the closest via.

CHARLIE

41:59 That makes sense.

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

CHARLIE

42:00 Yeah. So you'd be able too to go ahead and set rules around that, right? So, you know, if you went in and got this widget from a part, you can always, you know, at the end, go market up... up... up accordingly. And if they wanted, your tech can now take a picture instead of tracking down that, that's a packing slip or... or invoice, they can take a picture.

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

CHARLIE

42:25 I'm gonna use my... my coffee got here... of the invoicing all of a sudden that... that is just right there for you. Okay? So I think we're going to help. Yeah, the... the way you describe your kinda of go into a lot of different places. It's more about what's quickest and fastest. I think we're going to help with grease the wheels in terms of transparency in... in information and... and... and bookkeeping there. But... but I think it's still gonna require a certain amount of calling around and who's got this? Who's got it.

--- *Forms* ---

CHARLIE

42:56 Who's closest? You know... you know what I mean? Yeah. Alright. Let's... let's keep rolling. Do you guys have your text fill out any sort of... of like inspection paperwork or like a safety checklist or working management? Any... any paperwork that's separate from that actual ticket?

MARK

43:15 No.

CHARLIE

43:16 Okay. No worries.

--- *Deficiencies* ---

CHARLIE

43:18 The next workflow that I want to show you is quoting, I want to show you how to attack, may identify an issue, or this could also work, you know, before you even out there, if you're trying to bid for a job, how they can identify an issue, get it reported back to the office for you to turn it into a quote and send it out to the customer. Okay? So I'm gonna hit deficiencies here on the top, right? When I use the term deficiency, I mean, a problem found that needs to be fixed generally when you make it a fish but deficiency, you're gonna turn that into a quote. So, we've already got a list here for this customer, but I'm gonna add a new one. Tell me what's a common, you know, a bad Dallas needs to be replaced, is that something that would... would a curve regularly for you guys?

MARK

44:02 Yeah. So it's not uncommon for... or text be called out in a while. They're there, they notice that lattice humming selling this. We assume that it's bad ballast. Yeah.

CHARLIE

44:20 So, I'm not say bad, Dallas need to replace now. I could type out paragraphs and paragraph some information here, but I think we both know getting text to do that every time is like pulling teeth. So we wanna make it as easy as possible for them to capture this information. So instead they can take a photograph. I need... I need to get some really cool knickknack here on my desk, take a photograph or one of my favorites. You know, we also have the video, but my favorite is the audio memo. The tech can stand there and record and say, hey, we found buzzing around this like we need to. I assume it's a bad balanced is get a quote to fix it. They need to have this thing repair by next Wednesday. Don't forget to add two widgets to the quote. Okay? Once we save that... that media is not going anywhere and anyone in the office can view it immediately. Okay? Now, we have to finish a couple of qualifying questions. Is this something that suggested for the customers? There's something we highly recommend us. We're gonna say inoperable, meaning we need to fix this right now. I'm gonna associate with that asset. But what you were saying is like we don't have like special equipment that you service. So in this case, you would just click building which is a default asset on every single location. Lastly, what's the status of this deficiency? Is this something that we just want to document and was quick and easy that our tech fixed in which case we might be fixed. But for us, we're going to put new again meaning me to Act-On it, we need to fix this now. So once a document that deficiency as a tech, I'm gonna keep doing my job. Okay? I'm gonna keep doing the service call but let's jump back to the office view and see what it looks like.

--- Deficiencies ends ---

CHARLIE

45:54 When we turn this thing into a quote. Now, you said there's a lot of times like you've got some standardized pricing cutting out. Now is 250 bucks. How often do you find yourself running into those like kind of repetitive or recurring quotes that you might?

MARK

46:12 Absolutely. Yeah, no, not very often to be honest.

CHARLIE

MARK

46:17 Yeah. Yeah. Because the... the recurring stuff is usually done time material. So we have, you know... you know, when one of our customers calls, when he's aligned to has a balance or lamp out, you know, they're not asking me for price is say go into do. It says Bill this, you know, a lot of stuff that we get quotes for is, you know, market standard called and they need raceway ran because another company's gonna come in and pull fiber for our new internet, you know, and that's nice every... every time you in heap raceway is going to be different than the last because there's gonna be a different link, different sizes, different needs. There's all of our repetitive stuff, you know, like cutting into one outlet or changing a balanced or placing a lot. No stuff. Typically, we don't get prizes for where they just say come to.

--- *Purchase decision* ---

CHARLIE

47:16 Gotcha. Well, I'll tell you what Mark. I'm gonna stop here and kinda say, man, I've... I've heard a couple of things throughout here. I'm just going to be blunt man. I... I don't think we're going to be a good fit for you.

MARK

47:29 Gotten that more than once. It's like I said at the beginning.

--- *Type of work* ---

CHARLIE

47:31 Yeah. And I just, you know, I...

MARK

47:32 Was a different business model.

CHARLIE

47:34 Yeah. And I was hoping that wouldn't be the case, but I think, you know, it'd B, a disservice not to say that I'd rather be honest with you. Now, for example, you don't do recurring service and maintenance. We've got a lotta Headspace in service trade designed around managing those... those maintenance contracts. There's intervals that asset thing. You guys sound like you would not get a lot of value out of tracking your assets and one of the pieces of customer equipment that you service. And then to, you know, quoting is such a big thing for service trade. It seems like it's not quite jhelum with your processes in my... in my... in my crazy here.

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

MARK

48:10 No, you're not... you're offering is where we want to get to but it's... it's a big pivot from where we're at. And so that's why when you asked if I would time from it,

no, I mean, we want to get there but it's like steering a giant ship. It takes a long time to get it to move. And we want to do it with management, maintaining relationships. And when we get into software like this because we have... we have so many customers already and these customers certain pricing... you know, we need a role flexible software and allows us to do that.

--- Pricing ---

MARK

48:55 And so it seems like a lot of the software out there they anticipate you have in your own supply house basically to where your text refill their trucks from your supply house. And so your prices are... are fairly stable where ours are. And just like I said, we don't have, you know, we may pay 14 dollars from ballast at this place where we're going to pay 20 dollars for it at the other place. And so we just market where we get it. We just market up 20 percent.

--- Assets ---

CHARLIE

49:21 Yeah. I think a big thing like a big pattern with our customers that have success with service trade is that they have standardized pieces of equipment. So, you know, for example, we work very... very well with the H back industry helping them track the H back because... because with that, even though there's a bunch of different brands, there's a standardized list of parts and... and it's not necessarily they have to stock it themselves.

--- Parts management (inventory) ---

CHARLIE

49:48 But the specific parts for H back is something that they can upload and mass and manage, right? Whereas you would just seems like you're you know, flying by the seat of your pants, a welcome. I'll take that job, you know, let's do it.

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

CHARLIE

50:00 What do we need to? What parsed we need? I don't know. Let's find out... find out where it is. Go get it, you know, as... as opposed to like, okay, we're going to our 20 fifth H back job of the week and we know.

MARK

50:11 I'm late enough. One of our big customers is... is an H back company. So when they do like, they see replacements, we go out there and... and upgrade the disconnects or, you know, don't do all of that cohort, you know, what they do rooftop unit for adding to disconnect or removing it. So, yeah, we just have, we just have company and we're not a tiny company.

--- Type of work ---

MARK

50:32 We have probably three total electrician... and we... we run them built ourselves on relationships. So we do... do bid work. We do bid jobs, but most of our jobs are negotiated rate handed to us. So yeah, we've... we've got a unique business model and... I'm always willing to... to receive help in that, find better ways to do things.

--- Customer engagement ---

MARK

50:59 But you're not the first person to send them a prominent. I get an.

CHARLIE

51:04 Yeah. And I mean, I think if you get to the point where you're so if... if you're not doing bad work, but I think it, and this is where the customer engagement piece comes into play and customer communication.

--- Customer engagement ends ---

CHARLIE

51:18 Like if... if you're managing your own customers in a... in a... a wide breadth of service customers, particularly if you have service and maintenance contracts with them, I think that's really the missing piece here. So, you know, let's tell me, I'm... I'm happy to sit here and keep going through service trade. I just don't want you to think that I'm wasting your time. You know, is... is, are there things and service trade that you like and are picking your interest? And you want to keep looking at it or is it just better to part ways as friends? You told me?

--- Pricing ---

MARK

51:47 Well, I think it's all interesting to me but I just, I kind of agree. I don't think at this moment, you guys can really help us. But I do say the pricing is the most reasonable so far. For example, like ServiceTitan, you know, gave me pricing. It was gonna be like 800 bucks a month?

--- Pricing ends ---

CHARLIE

52:16 Interesting. I think, I don't know this for a fact. Don't quote me on it. I wanna say that they charge you for like office users as well.

MARK

52:22 Yes, absolutely. And so, and we're big on transparency and we all help each other. We're make team. So even though I take care of the service departmental small jobs, I'm not, I don't know about myself. We... we help each other out. We use the same, we pull from the same labor. We have... we have a labor meeting every Thursday to make sure people are getting covered.

52:43 Those...

MARK

52:43 Are customers... and... and... we... we just have a unique business model where we do have some places where we can be more efficient and we're trying to fix that in our companies like you out there that can help it's. Just that we haven't gotten ourselves to spot where we can really utilize and get our money's worth that a company like yours.

CHARLIE

53:06 Yeah. Well, I'll tell you what... I'll... I'll follow up to you in a couple of months, see how you're looking, but I think, you know, but... but a big kind of benchmark I would be thinking about to where I feel like you would be getting your money's worth from service trade is if... a larger breadth of... of caution, yes, and then service and maintenance contracts there's.

--- *Type of work* ---

CHARLIE

53:32 Those are the two big things because I, I'm happy to sell your service, right? If you want it. I'll send you a contract and you can pay us, right? But I mean, I think you'd be paying for stuff that you probably wouldn't get value out of. You know what I mean?

MARK

53:45 And, you know, and I... and I do appreciate your time and I do invite you to... to reach back out in a couple of months because we are... we are growing as a company and part of my job is to help grow the service department. So... I will take that advice and that will send me something I'll work on. I've always been interested in service contracts.

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

MARK

54:05 It's just... we've been busy enough that just keeping up with all of our current jobs... it's... it's been... it's been, I haven't got as much done as I want to just like standardizing the trucks. So I've got my standardize list. I've got a company here in town is creating books for us for the service techs to have.

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

MARK

54:28 So as they do a job, they should be pulling off the randomly and as I pull off the Van parts, they stayed issues us, I have, they scan it and I create... like an envelope and like a... like a parts order. And so let's company every Friday, we submit our order every Monday to deliver to the trucks.

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

MARK

54:50 And so I've kinda gotten away. It hasn't we haven't... we haven't gotten the truck standardize. You have been, I've got... I've got best stuff in motion. And so once I get some motion, then we can start expanding on service contracts and more in... in... in expanding or equipment set that we work on.

--- Paper process ---

MARK

55:06 And then once we do that, then that's when, you know, you can come in and really get us organized and... and help us with that final push to really build a service department.

CHARLIE

55:17 Yeah, I would agree. I think the... the biggest value right now service trade we get to you is electronic tickets, you know, communicating what needs to be done where it needs to be keeping track of parts and labor through service trade.

--- Paper process ends ---

CHARLIE

55:32 But I think there's a lot of referrals stuff that, you know, that... that would just be kind of hanging out there. But I tell you what Mark, thank you for hanging out with me for an hour. I hope you don't feel like I've wasted your time. I'll shoot you an email with a recording of our meeting today just to have in your back pocket, you know, six months from now, but, you know, if you're curious or I can be a resource for you... you, got questions or whatever, please reach out to me.

--- Purchase decision ---

MARK

55:57 No, absolutely... absolutely. And I do appreciate your time because, you know, I got... I got something out of it. What I don't feel like I'm wasting my time there's. Probably last year, she didn't excel, but... you did. I felt like a little rebuild a relationship hearing. And so as we continue to grow this like I said, you were, you have the most reasonable pricing in a product is good.

--- Purchase decision ends ---

MARK

56:22 It's... it's seems very easy to use. And... and... and... and did like it. It's just how do I make it work with how we operate right now? Is... is the question. So, yeah, like I said, I offer you shoot me an email here in a couple of months and stay in touch because as we do grow and as we didn't get to ship turn this way, the direction we...

we will end up going. And so having that relationship all are already in. There was somebody who can help beneficial for me, so.

CHARLIE

56:49 Sure thing. Sure thing. Well, good deal. Mark. Have a great rest of your day and a great rest of your week, man. I appreciate your time.

MARK

56:57 Yes, sir.

CHARLIE

56:59 So...

MARK

56:59 Yup. Bye.

The End