



# **Boston Fire Sprinkler Co Inc & ServiceTrade Consultation**

Chris Kidwell with Boston Fire Sprinkler Co Inc  
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## **Participants**

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# Topics

<i>Purchase decision</i> .....	0:52
<i>Type of work</i> .....	1:57
<i>Customer engagement</i> .....	3:00
<i>Type of work</i> .....	3:31
<i>Accounting integrations</i> .....	3:57
<i>Type of work</i> .....	4:54
<i>Accounting integrations</i> .....	5:16
<i>Type of work</i> .....	5:59
<i>Access to information</i> .....	6:59
<i>Type of work</i> .....	7:16
<i>Customer engagement</i> .....	11:10
<i>Customer engagement</i> .....	12:21
<i>ST app contracts and pricing</i> .....	13:10
<i>Customer engagement</i> .....	13:24
<i>Purchase decision</i> .....	14:01
<i>Type of work</i> .....	15:20
<i>Assets</i> .....	16:24
<i>Recurring maintenance</i> .....	16:44
<i>Forms</i> .....	17:06
<i>Assets</i> .....	17:30
<i>Recurring maintenance</i> .....	19:33
<i>Dispatch</i> .....	23:37
<i>Dispatch</i> .....	24:25
<i>Access to information</i> .....	24:41
<i>Dispatch</i> .....	24:57
<i>Type of work</i> .....	25:19
<i>Recurring maintenance</i> .....	25:59
<i>Dispatch</i> .....	27:52
<i>Access to information</i> .....	29:20
<i>Dispatch</i> .....	29:52
<i>Access to information</i> .....	30:25
<i>Dispatch</i> .....	30:48
<i>Tech On-site</i> .....	31:19
<i>Deficiencies</i> .....	31:48
<i>Forms</i> .....	33:42
<i>Forms</i> .....	34:28
<i>Assets</i> .....	36:04
<i>Access to information</i> .....	36:54
<i>Quote templates</i> .....	38:05

<i>Parts management (inventory)</i> .....	38:27
<i>Tech On-site</i> .....	40:00
<i>Customer engagement (quoting and invoicing)</i> .....	40:39
<i>Tech On-site</i> .....	40:57
<i>Access to information</i> .....	41:27
<i>Tech On-site</i> .....	41:58
<i>Tech time tracking</i> .....	42:15
<i>Deficiencies</i> .....	42:34
<i>Quote templates</i> .....	42:51
<i>ST app contracts and pricing</i> .....	43:27
<i>Customer engagement (quoting and invoicing)</i> .....	43:45
<i>Quoting</i> .....	45:25
<i>Deficiencies</i> .....	47:12
<i>Quoting</i> .....	47:52
<i>Paper process</i> .....	49:17
<i>Customer engagement (quoting and invoicing)</i> .....	50:10
<i>Invoicing</i> .....	50:56
<i>Customer engagement (quoting and invoicing)</i> .....	51:37
<i>Type of work</i> .....	53:01
<i>Purchase decision</i> .....	53:56

# Transcript

*"This English transcript was generated using Gong's speech-to-text technology"*

ANDREW

0:00 Hey, Chris, how are you doing?

CHRIS

0:01 I'm good. How are you?

ANDREW

0:03 Very good. I, my camera is over here. So I'll be listening but no worries.

CHRIS

0:08 No worries. How are you doing this morning?

ANDREW

0:11 I'm doing outstanding.

CHRIS

0:13 Good deal. Happy, happy Wednesday. How about you? I'm doing good, wife. Hit me with the, you know, the Christmas is a couple of days away here's. My list of things to, and I'm like, okay, well, I'm going to work. So by.

ANDREW

0:25 Yeah, yeah, yep. Do you work from home?

CHRIS

0:30 Yeah, I do. So.

ANDREW

0:32 A little harder when you work from home.

CHRIS

0:34 Yeah. So, yeah, I travel a lot, so, you know, I've been an outside sales rep for the northeast. I'm typically traveling but this time of year, everybody being busy, it's kinda hard. So kinda home and travelling a little bit. So, yeah, it is a little difficult but we'll figure it out.

--- Purchase decision ---

ANDREW

0:52 There you go.

CHRIS

0:54 That's right? So, hey, wanna kinda start this off a little bit with trying to, I got some notes from Mike but kinda wanna talk and understand the business, and make sure I have a grasp as to what you're trying to see and what you're trying to accomplish. So, you know, a couple of quick questions from my side, and then we'll kinda get into some of the dog and pony show based off of those questions on what you wanna see today and where we want this thing to go. So, you guys, are looking at software.

--- Purchase decision ends ---

CHRIS

1:24 Do you have anything in place? I'm assuming fire life, safety, a lot of inspections, whether they'd be monthly annually, quarterly, kinda talk to me about that efficiency workflows, quotes projects or service, et cetera.

ANDREW

1:38 Yeah. So Chris, we're about 15,000,000 dollar year. Union sprinkler install business. I would say the vast majority of the work that we do is actually kind of installed to small install work.

--- Type of work ---

ANDREW

1:57 And in speaking with Mike, you know, I think, our Construction divisions are probably not well suited for service trade. I'd be curious to see your, you know, hear your opinion about that. But we do have a number of products, which last in excess of you six months a year, two years et cetera.

--- Type of work ends ---

ANDREW

2:21 So I'm not sure if that side of our business is really applicable. However we have a service maintenance and testing and inspection division, right? And so those two divisions, I think service trade could be very applicable for, you know. So that is your point, essential install. Excuse me, you know, buyer sprint or inspection, fire, sprinkler test service work, you know, maintenance work et cetera, right? That, you know, that we do.

--- Customer engagement ---

CHRIS

3:00 Yup. That's I believe that's a fair statement. So, so what ServiceTrade does grate on is your reoccurring work. So that's your inspection testing, what we call your pull-through revenue work. So go out there, find a deficiency. You need to repair opportunity and you guys quote that out you service trade to quote that out track, all of your quotes, turn that into what we consider a job, call it a project. But that's going to be more of your swap out retrofit things that are three months and less.

--- *Type of work* ---

ANDREW

3:31 Yeah.

CHRIS

3:32 We do a great job of handling. Typically, what we see is when you start to get bigger than three months, you start to get into Aia billing more of, a project management tool. And we don't do that.

ANDREW

3:42 Yeah. I mean, a lot of our, I would say 90 to like 92 percent of our work is with that Aia, you know, type billing.

--- *Accounting integrations* ---

CHRIS

3:57 Yeah. So I'm not gonna touch that Aia billing.

ANDREW

4:01 Yeah. That's that's fair.

CHRIS

4:03 A lot of our customers that do that kind of work will use a pro core, an E sub or two that come to mind or the or will live in their accounting system, a Sage product or a spectrum or yeah, whatever else is out there.

--- *Accounting integrations ends* ---

ANDREW

4:23 Yeah. I mean, we are, you know, I do think it is still worthwhile to talk though because we are really looking to grow our service maintenance testing inspection division. So we hire Greg Nelson from best fire sprinkler. Okay. Now, now they're a client of yours and, you know, he's heading up those two divisions for us and so... I think he would be interested in implementing this.

--- *Type of work* ---

CHRIS

4:54 Okay. Yeah. That makes sense then. Yeah. So, so absolutely happy to kinda show you around service trade. If the goal is to grow the service division, the next step or the next question, is, do you guys have processes in place now for the service side of the business or is like, are you using the software? Is it pen and paper, excel spreadsheet?

--- *Accounting integrations* ---

ANDREW

5:16 We had just pen and paper and excel spreadsheets.

CHRIS

5:24 Okay. So is there anything specific that you will, let me rewind a little bit? What do you guys use for the accounting side?

ANDREW

5:34 We use quantum?

CHRIS

5:37 Okay.

CHRIS

5:43 Anything specific that you wanna see today? Any, anywhere you wanna focus? If Greg's used the system in the past, you know, he probably knows it pretty well, but what do you kinda wanna? Where do you want me to steer this conversation today?

--- *Type of work* ---

ANDREW

5:59 I would like, I mean, I would like to see if service trade is the correct service platform for us to use for those divisions as, you know, as great grows those divisions. Okay? I would like to see whether this is the, you know, I'm looking, I think we're gonna need two applications up like, I like, you know, looking at our project management side, I don't think it's applicable for, you know, for the service and maintenance and testing inspection.

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

ANDREW

6:32 I think it's really there, there is quite a bifurcation line. So I would like to see whether service trade could be our one stop entity for, you know, that, those two divisions and all the work that's within it. So I would still, I would still very much like, a full overview of the system, of the software, and kind of become more familiar with it.

--- *Access to information* ---

CHRIS

6:59 Okay. Yeah. So, we believe, you know, we have that same thought process, multiple applications to run your business, right? You, you don't go to your weather app to pull up Google maps and you don't use your calendar app, to get directions when you're using your phone. So, right?

--- *Type of work* ---

CHRIS

7:16 Similar process where you're running your business, you're not gonna try to run your service and inspection business out of a Construction based platform and vice versa, right? And, and I'll tell you that, hey, you shouldn't run Construction stuff out of ServiceTrade.

ANDREW

7:29 You should have...

CHRIS

7:30 Platform for that. We don't do that.

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

ANDREW

7:31 Yeah.

CHRIS

7:33 We believe in that best of breed mentality, and we believe we are industry leaders for your service and inspection side of the business and the fire light safety space. So, I'll kinda talk about that. I will keep this pretty high level if you want to get into the weeds and talk a deep dive about some things, you know, just kinda stop me and let me know, fire away with some questions. I'll kinda ramble for a little bit. So if I'm just stop me, but...

ANDREW

8:02 Candidly, Chris, I actually would prefer the weeds, right? So like I would like to see... you know, how like what the interface would actually look like, how it would almost walk me through with like what a service call would look like. Yeah.

CHRIS

8:23 Yep, I will do that. Yep, we'll get to that. We'll, we'll run through like an inspection and capture deficiency and go through a quoting process. So we'll kinda right. I'll go through the, and I'll go quick but we'll dive into it a little bit.

ANDREW

8:36 Okay, good.



CHRIS

8:38 And when I get there, it'll make sense. Visual for me. At least, right? I'm a visual guy hands on kinda guy. I got to see it before I can kinda really elaborate and I'll show you what that means. So let me just kinda start here and tell you a little bit about service trade. We've been doing this for over 10 years. I've been with the company for about six years. I focus on the northeast as an outside sales rep. We've got over. Well, this is now 1,300 and update over 1,300 accounts in the commercial industrial space using our platform. So, what I mean by commercial industrial is strictly mechanical, electrical, plumbing and the fire life safety. So, I believe, you know, probably 60 percent of our customer base is in the fire life safety business.

ANDREW

9:24 And now, in Boston, what union sprinkler and like plumbing companies are you working with?

CHRIS

9:34 That is a great question off the top of my head. Castro is up there? Best automatics up there? Try state is up there on cores up there?

ANDREW

9:52 Now, what is Ken use you guys for?

CHRIS

9:58 They use us for their mechanical and fire life side, fire life safety side of the business.

ANDREW

10:04 Okay.

CHRIS

10:08 I can give you a couple of others. I don't know off the top of my head.

ANDREW

10:12 I think that's good. I'm just always curious kinda, my whole opinion on this industry is like, I think people try to over complicated, and I always am curious as to who is using what, because I think that's probably kind of what will end up, right? You know, obviously we'll try to custom fit some stuff. But at the end of the day, you know, we're not that much smarter than anyone else, right? So.

CHRIS

10:40 Yeah, that's right. Right. And if I could check nine out of the 10 boxes, that's pretty good.

ANDREW

10:46 Yeah.

CHRIS

10:48 Yeah. And, I can give, if we get there, I can give you all sorts of references. We, we do believe we're industry leader in the fire life safety market when it comes to the software platform for your service side. So I can sync you up with some folks up in Boston, we.

ANDREW

11:01 Okay. That'd be great.

CHRIS

11:04 Yep. So, so some of the things that we do and we focus on is obviously helping your service and project operations, right?

--- Customer engagement ---

CHRIS

11:10 Project being the small side of the business, helping you guys control some of your costs, really big on setting the technicians up for success, right? So giving them the tools out in the field. And we have a couple of different workflows that we'll talk about today, but allowing the text to have the app with all of the information that they need at their fingertips. A big focus on us, is helping you guys grow your quality revenue. So what do we mean by that? Is selling more of those service agreements which will allow you to get capture more of those projects that pull through revenue, to. And then we also try to get your customers engaged with what you're doing in a digital format and grow that customer loyalty, right? So, so kind of the Amazon effect of how many times can you touch your customers in a marketing fashion digitally per inspection that gets completed? So some of the things that we do, we're obviously going to handle all of your office coordination, which is going to have all of your scheduling and dispatching.

--- Customer engagement ends ---

CHRIS

12:02 So, right. Throwing all of my inspections up on a map, starting to build out routes. That makes sense for your guys based off of the time of the year, etcetera. Here's, what the technicians are gonna see, this is their mobile app, right? Where we'll go through this. And it's going to have all of their stuff that they're supposed to do comments.

--- Customer engagement ---

CHRIS

12:21 This is where they'll add all their pictures and videos, the deficiencies, they'll tell you all of the labor that they're using et cetera. We have what that customer loyalty piece. We have a customer portal where your customers can go in to your guys website, log in. There, they can go see all of the different locations that they manage,

where they can go, see all the past jobs, upcoming jobs, they can get their inspection reports, they can find all the deficiencies, approved quotes through their portal. They can even go as far as paying invoices through the portal.

*--- Customer engagement ends ---*

CHRIS

12:56 Okay. So let me rewind a little bit that's kinda off the screen on my computer. We're also going to handle some of your light project stuff. So this is where we can, we have some project management tools, but again, it is light where we can do some Progress billing.

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

CHRIS

13:10 We can give you a whip, right? You can have different phases of it. You can create a budget, but right in save, gonna track all of your margins but it's not, we fall not fall short, but we don't handle the Aia billing. There's other tools out there that are just better than us.

*--- Customer engagement ---*

CHRIS

13:24 So we kinda stay in our swimming. And when it comes to those kinds of things us to give you all sorts of reporting, on the back end because we have all of these different data points, right? So we can go revenue by work order. We can do revenue by inspection. We can also track all of our pull-through revenue by inspections, etcetera. So we're obviously going to handle all of your quoting deficiencies, right? Getting these quotes out to your customers in a digital format, allowing them to engage with what you guys are doing digitally.

ANDREW

13:58 So it can produce proposals?

*--- Purchase decision ---*

CHRIS

14:01 Yes. Yep. We'll produce the proposals. Yep. And I'll go through that workflow today. So any questions on that before we kinda get into, the nitty? Gritty.

ANDREW

14:10 No, I think it's you know, it's obvious, right? It works for a lot of people, a lot of our competitors. So I'm sure, you know, it's roughly applicable for us. Yeah.

*--- Purchase decision ends ---*

CHRIS

14:23 So let's grab this big, last big lots job. Yeah, throw you on this specific location. So, so, to one quick comment as we go through this, we, this quarter and next quarter we're launching a whole bunch of updates. So, you know, as I showed you some things, we are launching a bunch of updates that we have been developing the last year. So some things may be different here in a month, but I'm gonna go through the core concepts.

ANDREW

14:50 Good question. Chris, how does, before we jump into this, how does this software relate to like BuildOps?

CHRIS

15:01 BuildOps is going to be more for your project management stuff. We're going to be more for your reoccurring services.

ANDREW

15:07 Okay. Got it. Okay. So they would complement each other?

CHRIS

15:11 Yeah, there's a little bit of overlap because BuildOps is trying to come into the reoccurring service market, but their focus is project management...

--- *Type of work* ---

ANDREW

15:20 Okay.

CHRIS

15:21 Are you?

ANDREW

15:23 We are, we're looking at BuildOps service, trade bid tracer?

ANDREW

15:35 Couple others, you know, candidly, Chris, I don't really know if we'll even use... a software on the project management side, it's just because all of our clients have all of our clients. Have they all have, you know, project management software, that we have to work with it, right? So.

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

CHRIS

15:59 Yeah. So, are you seeing a lot of pro core?

ANDREW

16:01 Yeah. GC use pro or I don't really like pro or for a subcontractor though. Yeah, it's also incredibly expensive.

CHRIS

16:14 Yeah, yes, it is. Yeah, the way they Bill it's kudos to them, they, they've got a little piece of that figured out, but yeah, it is very expensive.

--- Assets ---

CHRIS

16:24 Yeah. So BuildOps is going to be more of a gap of a project management piece where we're going to be more of a service inspection related piece. So, on a location page, just so you can kinda understand the data model real quick, we're going to track all of your reoccurring services, right?

--- Recurring maintenance ---

CHRIS

16:44 So this is where all of your inspections would be handled. So I can tell you if you've got quarterly annual inspection, semi, annual, whatever they are.

ANDREW

16:52 Yeah. And is there, a customer side that they can see all their inspections?

CHRIS

16:57 Correct. Yep. So we'll have a portal that they can log in and see, when is my upcoming inspections? When were my past inspections that?

--- Forms ---

ANDREW

17:06 Get a, get reports, right? They can get PDF out of there.

CHRIS

17:10 They can go find their inspection report, their past inspection reports out of that portal.

ANDREW

17:14 Does northeast fire sprinkler, do they, do you use them or do they use you? I don't know. Okay.

CHRIS

17:25 Northeast, I don't know.

--- Assets ---

CHRIS

17:30 Yeah, I don't know. I will look that up, but I don't know next tab down is going to be kind of our jobs, right? So this is what we'll track all of our jobs, whether it be unscheduled scheduled, completed, wherever they are. The assets. If we had all of our assets, they would be listed as a specific location page, right? So we can turn them inactive, which I probably should go fix that because this is.

ANDREW

17:57 Old...

CHRIS

17:57 Demo location. But... we'll also track all the deficiencies at a specific location. They'll all be tied back to a piece of equipment. We're also going to track all the quotes to the location page, our contracts, right? So we will know when we have this person under contract for and contracts going to handle all of your markup rules as well. So whether they be, you know, a premier platinum gold, silver bronze level pricing structures. However you guys want to have that set up... comments is pretty self explanatory comments can be technician notes, scheduling, notes, internal or external comments. And then an attachment bucket if you will. Attachments can be anything from pictures to PDF, wiring, diagrams, pictures of the building, blueprints, whatever you wanna do there. I'm just gonna go ahead and create a job real quick... grab two of these.

--- Assets ends ---

CHRIS

18:55 Multiple ways that we can schedule this out. I'm just gonna grab this one today. We'll say it's gonna be 10... so that's essentially just turning those services into a job. The other way that we can handle that is through our dispatch board. And what that looks like here, is we're going to track all of your available jobs, right? So I can see everything do soon as to latest, right? We can put all of these filters on here, right? So I can see the different job types if I only want to see service calls, if I only want to see whatever that is, right? I could do it by the different service lines.

--- Recurring maintenance ---

CHRIS

19:33 So service lines mean we filter out that's another way we can filter that out based off of alarms, back flows, sprinklers, suppression, et cetera. Technicians, we can associate technicians with, locations, or services. So like if I know Brett handled all of a specific location. So if I only want to see stuff that Brett needs to do.

--- Recurring maintenance ends ---

CHRIS

19:53 And then obviously, we can break it out by regions. We can break it out by different offices as well, right? So, so we have a lot of folks that can break that out by the different regions, you know, Boston for example, versus Connecticut versus New York, and so forth. We can also do that by due this week, next month. Anything that's overdue, right? And now here's a list of jobs for example of everything that's overdue. And then this is all drag and drop too, right? So I can just come down here and say, hey, let's send that JP Morgan job to nicoleto.

CHRIS

20:33 Andrew, did I lose you?

CHRIS

23:19 I'll turn the recording back on. I didn't get one so, but I don't know, I don't know.

ANDREW

23:25 You froze and then I got dropped and I said I had to resign up my apologies.

CHRIS

23:30 No worries. I don't know where I lost you though, so.

ANDREW

23:34 You lost me right on dispatch? Yup.

--- Dispatch ---

CHRIS

23:37 Yeah. So I still there. All right. So, so... this is our dispatch board. And, and again, I don't know where I lost you specifically, but all this is drag and drop. We'll have all sorts of filters here. You can filter out what you need to see, right? And then this is all drag and drop. So it's pretty.

ANDREW

23:55 So that's super cool.

CHRIS

23:58 Right? So that'll be there. We also have what we call a queue, so I can have jobs up here in a queue and essentially.

ANDREW

24:06 Almost like on call?

CHRIS

24:08 Yeah. And this is just, hey, these are our priority jobs. We don't really know what we wanna do with them yet.

*--- Dispatch ends ---*

CHRIS

24:13 This is just a catch all bucket. This is a priority spot. This was a real big request from a lot of our customers that we just launched recently of like, hey, I just wanna see a queue. I just wanna see a list of things that we, that as a priority.

*--- Dispatch ---*

CHRIS

24:25 And this is kinda where you guys can kinda see that. And then obviously, again, this would be drag and drop and you can kinda... pick out things that would make sense, right? So I can just put that down there on Ben's schedule.

ANDREW

24:39 Got it. We.

CHRIS

24:40 Can see that on a weekly view.

*--- Access to information ---*

CHRIS

24:41 And again, I'm on a I'm on a small laptop, but you would obviously have a bigger screen that would have more of a weekly view, right? Because a lot of our customers working for eight hour splits. So that's more of a weekly view. And then we're also going to have a monthly view... right?

*--- Dispatch ---*

CHRIS

24:58 And you can obviously go back and see what's happened in November, December, whatever that is. And then this is all drag and drop to, right? So we can change that out.

CHRIS

25:11 So, some kind of intuitive for the scheduling? A side note, we're putting a whole bunch of AI behind the scheduling and dispatching.

*--- Type of work ---*

CHRIS



25:19 So giving you guys visibility of, you know, the most qualified technician for a service call or hey, who is the technician that can get there the fastest based off of some AI. So we are using some AI for some of the scheduling and dispatching stuff.

ANDREW

25:35 Yeah. I mean, our stuff is a little bit more predictable, right?

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

ANDREW

25:39 Like in terms of like I think because we are a union company, right? Like I think we try to be a little bit more consistent, in thoughtful on manpower then like, hey, go there, go, you know what I mean? Like it's just a little bit of a different.

*--- Recurring maintenance ---*

CHRIS

25:59 Okay. So that's kinda where, this what underneath of service opportunities is going to be more of, your predictable scheduling. So this is more around your inspections of, hey, I need to run a report next month for again, we can break that out by all of your different offices. Show me just my reoccurring services approved would be quotes. Obviously one time would be service calls, right? Again, we can filter it out by service line. So, if I just wanted to see my sprinkler stuff versus alarm, et cetera, technicians, like I said, we could, we can associate all of these services with a tech.

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

CHRIS

26:32 So if you wanted to build out a guy's route, just say, hey here's your stuff to do, right? But multiple ways you can build this out, what most of our customers will do will check this button and that's going to create all of these jobs. I'm just gonna grab a couple.

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

CHRIS

26:43 So I don't kill the whole demo account... and then we're gonna say, hey, these are going to be all of our inspections on installs, inspections... quick snippet of what's going on, right? We got a hood cleaning. We gotta go do some sprinklers here. We're expecting this to be an hour for 200 bucks. I'm gonna go ahead and create these nine jobs. And then what our customers will do next is they're essentially, now that I've created those nine jobs, I'm gonna throw them up on a map. Let me turn my video off for a second. Hang on.

ANDREW

27:19 So, Chris you think like do a lot of fire extinguisher companies use this?

CHRIS

27:27 Do a little bit where fire extinguisher companies get a little bit difficult is when they have like a location with 5,000 sprinklers that they need to manage, that can be a little cumbersome. What did I say? I said next month? But yes, we do have a lot of fire extinguisher companies using our platform.

--- Dispatch ---

CHRIS

27:52 So essentially, what that does is now that's going to throw everything up on a map, right? And again, another view, I can get a daily view. I can get a weekly view, my technicians over here on the side and this is where I can... start to drag and drop some folks over here, right? If I'm going to send Gordon out to North Carolina, I can send him there Thursday. Let's just say it was going to be a two day job right now. I got multiple appointments on that specific work order... and I can add Nicolett on that one as well. Again more of a predictable, more of a predictable scheduling workflow where I can see all of these things out of here on a map and start to drag and drop based off of what, what's gonna make sense for each technician?

--- Dispatch ends ---

CHRIS

28:40 Any questions that kinda makes sense? Self? Explanatory?

ANDREW

28:44 Yeah, that makes sense. I mean, I think we're really just like in the city of Boston, right? So in the surrounding area, so it's a little bit different for us?

CHRIS

28:57 Yeah. You guys, you guys would be centrally located to that and you can break out Boston by different regions, right?

ANDREW

29:03 Yeah.

CHRIS

29:04 So, if you wanted to break out Boston by the different regions, you can do it by the different zip codes as well. So you're only seeing stuff in certain areas, but this helps a lot of the trucks driving back and forth past each other on the highway type stuff.

--- Access to information ---

CHRIS

29:20 Gonna jump out in the field and handle this big lots job.

CHRIS

29:28 Let me try to get my screen.

CHRIS

29:37 So, on the left side, you should be able to see, my technician workflow. Yeah. So here's, what the technicians are going to have and compatible with any android or iOS device, some of the technician capabilities, I can see unscheduled work, right?

--- Dispatch ---

CHRIS

29:52 So, if you just want to throw 30 jobs up and that's more of, the extinguisher inspection workflow of just throwing the 30 jobs up for a guy in a week a month, however you want to do that and just go get them done. I'll see in the end of the month technicians can also see completed jobs. So, if I needed to come in here and figure out what I did at the whole foods, I can come in here and see what I did at the whole foods back on July nineteenth.

ANDREW

30:15 And does this interface without look to?

CHRIS

30:19 There is some interface with outlook? Yes.

--- Access to information ---

ANDREW

30:25 You, I see you're an apple user. So I'm just curious how it, does it have a similar interface?

CHRIS

30:33 Don't know what the exact interface is to outlook that?

ANDREW

30:36 Okay.

CHRIS

30:38 Yeah, but, we, I don't know to answer your question... we can also throw these things up on a map for the guys.

--- Dispatch ---

CHRIS

30:48 So if you want to allow your guys to kinda pick and choose more of, their schedule, that right? They can do that. I can come in here and find four appointments at a specific location and go do that job. I can also filter this by today. We can also, you guys can also not release appointments. So you can build out a technician schedule and not release any of the appointments until he's ready for them. But I'm gonna come down here to this big lots job being a union in Boston. I'm assuming you guys do not clock in and clock out?

ANDREW

31:17 No, we do not.

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

CHRIS

31:19 Okay. So, what will happen here, is, hey, you can clock in. I'm just gonna clock in for purposes of the demo. But now I'm supposed to be here. I can see my three services that. I got an alarm systems here that I'm supposed to go. Do I gotta go look at the sprinkler and it looks like I got a portable extinguisher... comments, right? This can also be talked to text. I'm all done with this job, customers. Happy?

--- *Deficiencies* ---

ANDREW

31:48 That's super cool... then.

CHRIS

31:52 Next one over is the deficiency loop. So I'm gonna come in here and I'm gonna go ahead and capture deficiency and we can say we got a cro to sprinkler head... right? Attachments. This is where I'm gonna start to take all my pictures, video, audio, all of those kinds of things, right? We'll make that deliverable to the customer. Just go ahead and do one more... the top, right? I'll just click add. We can do video. We can do audio, for example, you know? So hey, Andrew, this carrot sprinkler has broke. It's gonna take me six hours to swap out and I'm gonna need a helper. I have the parts in stock on my truck.

ANDREW

32:37 It will then convert to text. No, that's just going to be a voice note.

CHRIS

32:43 Voice note. Yup. So we'll click save the severity. We're going to say that it's inoperable. The asset, right? I'm just gonna default to the building because I don't have my assets in here, but they normally would be, right? And we'll throw it on the suppression status is going to be new... proposed solution. We need to fix this a sap. So they're up to code.

CHRIS

33:12 And I'll click save. So now the office is gonna get an e-mail notification that this deficiency was just captured... right? So that's just capturing a deficiency on a specific location. Let's just say this was a TAM or a service call and I want to show you my work that got done. I can come in here and also take more pictures, right? From a service call standpoint. I can do all the pictures, audio video, whatever we want from that standpoint... contacts, right?

--- Forms ---

CHRIS

33:43 Pretty self explanatory... inspection paperwork. This is where we can go ahead and handle all of our inspection paperwork. If you guys have that, I'm assuming you guys have all of your inspections for Boston and a PDF version. Now, are they still pen and paper?

ANDREW

34:01 PDF form.

--- Forms ends ---

ANDREW

34:03 A lot of the guys still do paper and then we just translated into PDF. I would love to see what that looks like. So we have two workflows from.

CHRIS

34:12 The standpoint, I will go through, our old workflow. I will send you a video on what the new inspection manager tool looks like.

--- Forms ---

CHRIS

34:28 We're they're going to click view more details, and this is going to create those inspection reports into a fill able PDF where, you know, let me just grab demo paperwork.

CHRIS

34:44 We're gonna turn, these forms into billable PDF and the technicians will use their phone or their tablet and we'll pre fill a bunch of the information onto the forms. If they're clocking in. If they're not, they're going to have to go fill that out because I don't know what job that's specifically associated with, but you can see that they'll fill. We'll pre, fill with that information. I can see who my contact is, locations, right? And then the technicians will go through here and start to check. Yes, no, yes, yes, we did all this pass fail, pass whatever that is, right? And then at the top, right, they're just gonna click this button and go back here and click add to service rate. And now that inspection form is going to be attached back to the job.

CHRIS

35:32 We, we have a, actually the other way that we can do this, I can pull it up right now is we have an inspection manager, which is this workflow, is going to be through. They would come in here and they would get their form and this would automatically get dispatch based off of the job that they were associated with. Again, they're going to have to clock into that specific job though. And then we pre fill all of this information out. And then this is where the technicians are going to say, hey, you know, these would be your guys questions. What is the frequency of this, is for a hospital, right?

--- Assets ---

CHRIS

36:04 And then I can come in here and click the piece of equipment... and I can go through all of this different information.

CHRIS

36:17 Right. And then we can build out all of these different inspections forms based off of the pieces of equipment. I can add the different assets... for time purposes.

--- Assets ends ---

CHRIS

36:28 I'm not gonna go through all of this, but you can see this is more of a not as much of a pension Zoom but more of a easier for the technician.

CHRIS

36:41 Right. So you can kinda see, right? We can put some guardrails up here. I'm not going to go through all of that. But then at the end, they would just click the checkbox and say, yes.

--- Access to information ---

CHRIS

36:54 Right.

ANDREW

36:55 To understand how this would, because like... I'm just trying to understand how this would look in like a windows system, do all of.

CHRIS

37:11 Great question. So, so do you guys, are you guys using Microsoft surfaces?

ANDREW

37:17 No, we have ipads for our guys. But then like I'm just thinking of, so this would all look like this on the iPad. Yeah, but, we have windows computers. So I'm just

thinking.

CHRIS

37:31 That's fine. Yeah. So compatible with any android or iOS device out in the field, from a back office standpoint, all you need is a browser.

ANDREW

37:41 So...

CHRIS

37:42 Running on windows, we're just not compatible with the Microsoft surface tablets out in the field.

ANDREW

37:49 Yeah, no, we have iPad for all the guys.

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

CHRIS

37:51 Perfect. So, if you have, and I'll send you a video that goes in a little bit more in depth around the inspection manager tool. I don't not gonna go through that today for time purposes. Okay. Next tile over is going to be all of our job items, right?

*--- Quote templates ---*

CHRIS

38:05 So this is where I can tell you, hey, I had three hours of labor here yep I did this extinguisher, right? We got this sprinkler labor. I use that as well. Here's my alarm labor, right? This is also where let's just say that this was a service call and I need to come in here and tell you that I had to use a widget... and we had to use five of those widgets... right?

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

CHRIS

38:32 I can also come in here and say that, I had to use some pipe. These would all be your guys, different items that you guys use... put it on a dry sprinkler... right? So that's just me telling you, what I consider consumables... any questions on that?

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

ANDREW

38:57 No, I mean, so Chris, is there like, is there a way that like you can provide like a portal for me to fly through this on my own too?

CHRIS

39:08 Not really. We have some product tours that I can send you, but we don't really have like, a demo account if you will.

ANDREW

39:14 Okay. That's always something I wish people did more because, I need to like it's great to look at, but I need to like get in there. You know what I mean?

CHRIS

39:24 So, we used to do that, but it failed miserably and it failed because one, the demo account never had any data in it. People would log in and get overwhelmed because it's a, there's a whole bunch to it and they haven't gone through the training program.

ANDREW

39:38 Yeah.

CHRIS

39:39 Right. So you're kind of clicking a whole bunch of buttons and you have no idea where you're going because you haven't been through the training.

ANDREW

39:44 I can see that.

CHRIS

39:46 So, what I will typically do, if that is what you wanna do and this does make sense, is I can give you some access to my demo account and give you a couple of fake jobs and just run through it and I'll walkthrough those things with you is the best way to do it.

--- Tech On-site ---

CHRIS

40:00 But we don't really have a... test account if you will. Okay... the next thing I'm gonna do is I'm gonna go ahead. Are you guys capturing signatures out in the field?

ANDREW

40:14 For time slips?

CHRIS

40:19 So, you, are you?

ANDREW



40:21 Yeah.

CHRIS

40:22 Okay. So basically, the way that workflow looks is I'm gonna come in here from a technician. I'm gonna create a work acknowledgment. I'm gonna look at all the different things that we have here. I'm gonna go ahead and review this, and this is where essentially you would turn this over to the customer, whoever is on site and say, hey, we were out here to do these three inspections here's.

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

CHRIS

40:39 All the parts in labor that we had to use, right? I got nine hours of labor here, whatever that is. By the way, we got a deficiency blah, blah blah, and the customer is gonna confirm and sign... I'll send you a copy of that, but typically, most of our customers will turn that off the technicians essentially.

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

ANDREW

40:57 Yeah, I don't like, yeah, I don't think we would use that. I think we only require signatures for when there's like additional TAM authorization. So like time and material authorizations.

CHRIS

41:09 Yeah. So then that would be a, let me go back... a pre work authorization.

ANDREW

41:15 Yeah.

CHRIS

41:16 Right. So basically, you would come in here and you'd say, hey, you guys are authorizing me to go do all of this stuff. I wanna make sure that this is good and they would then go ahead and sign that preauthorization.

*--- Access to information ---*

ANDREW

41:27 Yeah, we're more, you know, likely to use that.

CHRIS

41:32 Yeah, yup. So, that capabilities there.

CHRIS

41:39 So, I'm gonna jump back in the back office now and finish this thing up and show you what our quote is gonna look like.

ANDREW

41:46 Got that. E-mail...

CHRIS

41:48 Yeah. So you're gonna get a couple more here in a second. You'll see kind of what I'm talking about.

--- Tech On-site ---

CHRIS

41:58 Back in the back office, we're still in Progress because the technician didn't say he's actually done his work down here. This has now changed to completed, right? You can see all my three services are completed. As I continue to scroll down, you can see all the different items that the technician used out in the field.

--- Tech time tracking ---

CHRIS

42:15 And again, you can fix this and correct whatever you want to in the field, right? Hey, you only have four items, pipe, not five. We need to charge this customer 50 dollars, not 12... right? And each one of these items will be associated with the different service. You won't use these clock events.

--- Deficiencies ---

CHRIS

42:34 But if you ever decide to that's there, here are the assets that we were supposed to be working on. As I continue to scroll down here's. This deficiency. What I wanna do is quote this thing out real quick for you, so you can see what this is gonna look like... create a new quote, let's do expiration date, end of the month.

--- Quote templates ---

CHRIS

42:54 So this is kind of the pull-through revenue aspect, right? So.

ANDREW

42:57 Yeah.

CHRIS

42:58 Not going to be your big heavy duty Construction but you can kinda see, you know, what we do is we're going to throw a template up here. Cro, sprinkler head is

what I think I call right? Where this quote descriptions, all your verbiage here's. The, what I call a boiler template. We're going to throw a quick couple of things on here. And then obviously, you can come in here. And, hey, Chris said we got six hours of labor based off that audio recording on for, you know, and we got to charge this customer trip charge.

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

ANDREW

43:27 All right.

CHRIS

43:27 We can choose how we want to show this to the customer if I want to light item it out grand total TAM. However that is if it was a bigger project, we call them services. Some people call them phases of the different job. Obviously, your contract rules are going to handle all of your different markup rules.

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

CHRIS

43:45 So you can see my marks will change based off of the contract. Gonna click save. I'm gonna send this to you, Andrew. But first, I'm gonna turn the audio off because that was meant to be internal. Andrew. You now you now have that quote in your inbox, but essentially, you might have to refresh it. It's gonna take a second especially since I got my video on. But what will happen, is obviously your guys logo will be in the top left here. Once you get that e-mail in your inbox, you scroll to the bottom, there will be a view and respond to quote. This description of work is going to be all of your guys verbiage. Obviously, right? You can see I just grand totaled it out. So I didn't line item. It... t's and c's will be all of your t's and c's. Did that quote come through?

ANDREW

44:40 Let me take a look all.

ANDREW

44:48 Yep. I got it.

CHRIS

44:49 Yeah. So just if you can scroll down to the bottom, if you respond and approve it, I'll show you some cool things that kinda happen in the back end of things.

ANDREW

45:02 So you want me to approve it? Yeah... enter your purchase order just to one?

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

CHRIS

45:12 Yep. So you can set that out to require a purchase order.

--- Quoting ---

CHRIS

45:25 You can now see that quote has been approved. We'll also track a full history of that quote, right? So I can see when the technicians are adding pictures and video. I can see you viewed that quote from this IP address. I can see you approved it with that po number. You can now go ahead and create a job from that specific quote?

ANDREW

45:41 Sorry, let me get back to you. I'm on. Okay. So I got another quote.

ANDREW

45:53 All right. So should I click on this quote?

CHRIS

45:58 I believe you already did.

ANDREW

46:04 I got a quote for big lots from allied systems has been approved view quote. Okay?

CHRIS

46:11 Yeah. So that's basically saying that quote has been approved?

ANDREW

46:14 Yeah.

CHRIS

46:16 Yup. Right? So, so that's kind of the customer engagement aspect of things through a digital format if you will. And now that quote has been approved from ServiceTrade standpoint, I can go ahead and add that to an existing job. If I know we got to be out there next week next month, I can go ahead and create a job from that quote as well... right? I can also turn that into a project if I needed to. And a project is just gonna hand.

--- Quoting ends ---

ANDREW

46:45 Chris, do you see like, the project manager or... a project manager like manages this for the technicians in the field? Like someone in the office is doing all of this, you kinda have like one person really own this.

CHRIS

47:08 Yup. Yeah, that's how most of our customers will do that, right?

--- *Deficiencies* ---

CHRIS

47:12 Because the other side is underneath this quote tab, let's start deficiencies, somebody's gonna, somebody's going to be getting these e-mail notifications. Is these deficiencies are tracked of like, you know, hey, this deficiencies here, this deficiency. So they're going to come in here and turn those deficiencies around the quotes as fast as possible. And you guys can run reports of all of the different, these different fields on how you want to track these deficiencies. So whether that be inoperable, suggested what's the status, whether they've been new, verified fixed resolution, right? So just show me all new deficiencies. So somebody's job would be to live here and just take these things and figure out if you need to turn them in the quote, just make them disappear or whatever.

--- *Quoting* ---

CHRIS

47:52 And then once they get to a quote status, somebody's job is going to be to live here in this quote status of, hey show me all quotes based off of these different search parameters. And what that means is we wanna make sure that these quotes are actually turning into jobs because that's how we drive some of that pull through revenue. And I can run reports and, you know, for example, show me all quotes submitted and viewed that are going to expire before January. Here would be the list of quotes. You can bulk, send them back out to the customer too, right? So here's everything customers have taken a chance to look at but not approved. Let's go ahead and bring them back to the top of the inbox. So somebody's job is going to be to manage, the quotes report as well. And that is typically an admin, sales rep, office staff.

--- *Quoting ends* ---

ANDREW

48:46 So, I mean, obviously a great tool. I think... it is... it's just, I'm thinking about how much resources it takes to keep this thing up the day, right? Like it's probably pretty much a full.

ANDREW

49:11 It's it's a full time job for someone, right?

CHRIS

49:14 What, what do you mean by resources to keep it up to date?

--- *Paper process* ---

ANDREW

49:17 I just think because we do things like analog, right? Like we're just, we have excel spreadsheets and everything goes out through outlook. So it just, it allows us to just kinda, I think do things a little bit like in the short term, it's a little easier, right? Like just because you're just like it's ad hoc, right? Right? But I think like this is obviously, as we grow these divisions, we're gonna need something like this.

--- Paper process ends ---

CHRIS

49:44 Yeah, yes. So, so I think what you're saying is scalable.

ANDREW

49:48 Yes, exactly. Yep. Yeah.

CHRIS

49:50 Yeah, yeah, very scalable. Right? So, like, our biggest customers have 800 guys out in the road.

ANDREW

49:55 Yeah, yeah, yeah.

CHRIS

49:57 So, so, very scaleable. And then, you know, as you guys kind of grow, you'll figure out how many admin staff you need for every technician based off of the workflow and the work demand.

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

CHRIS

50:10 Last thing I wanna touch on is just completing out this work order, right? Because I'm gonna go ahead and complete this job now that everything's done. And again, this would be an admin role. I can immediately create an invoice. But what I wanna do is send you a service link because you were asking me about kind of how does that service link work with, the portal and the inspection report? But this is what it's gonna look like before I send this out right here's. My inspection form here's. My work acknowledgment. Yes, I want that visible to the customer. I'm gonna turn that audio off. I'm gonna send this to you. So you have it in your inbox, you can look at it after this meeting. But now that's in your inbox, and then the next thing I do is I go ahead and invoice this job and this is going to allow me one more time to button up whatever I need to. And now, I'm gonna go ahead and turn this into an invoice.

--- Invoicing ---

CHRIS

50:56 Once I get to an invoice, obviously, we're going to have your margins over here. Here's. Everything else. I can pick and choose how I want to show this invoice. So if you invoice out of service trade, right? I can choose how I want to show this.

ANDREW

51:09 Service trade interface with Quickbooks.

CHRIS

51:12 Yes. Yep. So that's where, if it was a Quickbooks, we would have sent to accounting system. If not, I can send an invoice link. I'll send this to you just so you can kinda see what it looks like as well, right? Obviously, obviously don't pay that... but obviously, this would be your guys logo here's.

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

CHRIS

51:37 The invoice of all of the stuff that we did, blah blah, and we picked a big one because we had like three or four different inspections. But the cool thing about that, is your customers then can go ahead and click pay now and pay with a credit card or a CH, as well as they can click that blue arrow on that invoice and it's gonna take them to what we call the service link, which is going to handle all of that field, capturing data of all of my appointments services attachments there's, their inspection report, everything else. So they'll know what that invoice is tied back to.

CHRIS

52:13 So, that's the really quick fire hose... demo of service trade without going through the inspection manager tool, which I'll send you a link on how that works. Any questions?

ANDREW

52:31 No, I think those guides would be very helpful in terms of in terms of like reviewing this on my own.

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

CHRIS

52:42 Yeah. And, I recorded this so I will send that to you as well.

ANDREW

52:46 Okay. That'd be great.

CHRIS

52:48 Yeah. How many, how many technicians do you guys have on like the inspection service side?

ANDREW

52:54 You know, that's what I'm kinda grappling with Chris, is it's really only like one or two at a given time right now.

--- *Type of work* ---

ANDREW

53:01 Obviously, we want to scale that, right? But it is a, it is a leaner operation. On that side. We have like 30 guys on the install side.

CHRIS

53:11 Yeah. So you guys are big on the Construction side of the business?

ANDREW

53:15 Yeah, exactly. Yeah.

CHRIS

53:20 Okay. So help me layout next steps, Andrew, because I know we're coming up to time which I think we booked an hour.

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

CHRIS

53:28 We may have booked 45 minutes and I totally screwed that up. That's my bad. No, I put that on.

ANDREW

53:33 Would like to do is if you can send this meeting to me, I would like to look through it. I wanna go through all these emails again. I look at what the interface looks like and do you, does interstate use?

--- *Purchase decision* ---

CHRIS

53:56 You guys?

ANDREW

53:58 You do? Yup.

ANDREW

54:06 All right. Well, I will, I just gotta let me get back to you Chris on next steps. I wanna talk with Greg Nelson about it a little bit more, and I think we will end up implementing a service, you know, a software like this. I just won't need to know kind of understand when, what is the right time to do that, right?



CHRIS

54:29 Yeah, yeah, absolutely. So, I'll send you this recording. I might ping you probably after the new year, just in top of the inbox, make fresh on the mind... at that point, I'm hoping we'll have a little bit more clarity on what, you know, what we call Mutual action plan is to Pat.

*--- Purchase decision ends ---*

ANDREW

54:48 Whether...

CHRIS

54:49 It be ServiceTrade or not.

ANDREW

54:50 Yeah, yeah, no, I think, you know, Greg spoke very highly of you guys. I think it's just we're transitioning over to ignite right now for our full company like a folder structure and I kinda wanna get that landed first and then we'll make the move to the project management side of things. Okay? All right.

CHRIS

55:14 All right. Thank you, Andrew. Bye.

ANDREW

55:16 All right. Parse, you have a great day. Bye bye.

*The End*