



# **ServiceTrade Demo with Marcellus Mechanical**

Harrison Miller with Marcellus Mechanical  
Recorded on 11/4/22 via Zoom, 1 hour 5 min.

## **Participants**

### **SERVICETRADE**

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### **MARCELLUS MECHANICAL**

Gered Marcellus

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# Transcript

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

HARRISON

0:00 How are you doing today? Good. Let me get my stuff portal for us really quick. Happy Friday to you. Yeah, man. It's been a long week. I'm ready for it.

GERED

0:15 Right.

HARRISON

0:16 Well, cool. Man. Are we waiting on anyone else would be me and you today? Awesome. And let's see you are, let me pull up my notes. I just got out of another meeting. So if I seem a little scattered rain right now, it's probably because I am, yeah, you're the owner service manager? Yeah, kinda do it all over there.

GERED

0:36 Yeah, yeah.

HARRISON

0:37 Perfect. Well, then quick introduction of myself. Then my name is Harrison. I am one of the territory managers over here at service trade.

*--- Purchase decision ---*

HARRISON

0:45 So really my whole goal for today is that just wanted to walk you through it, see if it might be a good fit, you know, for what you're looking to do first thing before we dive into it. I just want to have a quick conversation, you know, type of work. You're doing what you're looking for in a software, things like that. And then after that, we will dive into the platform. If everything looks good, we can discuss what we think the best next steps should be after that, does that work with you? Yeah, that works with me.

*--- Purchase decision ends ---*

HARRISON

1:09 Okay. Cool. So, I have some notes from your conversation with Emily was like you've been in business for a few years. You're the only tech there right now. You know, trying to get a little more commercially based software to kind of, you know, ramp up that tech count and things like that.

GERED

1:27 Yeah. Yeah. So we are, we mostly do industrial refrigeration. Okay. So, so I've got a I've got a couple of food production plants that we just picked up and then we're going to be going after about 10 or 15 ranks like ice rinks, and then... we've held off.

--- Type of work ---

GERED

1:50 We've got some property management companies wanting us to come in and look at some towers like 40 story towers probably... for the ones with water source heat pumps. You're probably looking at like a 1,000 pieces of equipment for those ones. And then the ones with the big chillers, you're probably looking at 15 pieces of equipment, probably like three or four boilers, a chiller, you know, cooling tower, and then that would make a bears and stuff like that. So... yeah. So basically, just what I'm looking for is something that's more like we're able to get by with the software we have now, but it's just, it's no fault against it is just not designed for commercial, right? It's more designed for, you know, one job, one off customers, one off jobs completed that day and then not real far. No real follow-up right?

HARRISON

2:39 Right. Yeah. And it, I believe it was service name that you're...

GERED

2:43 Yeah, service name, which is good since 2016 for us, right? It's just... you know, we just, in order to grow, we have to be able to offer what the other bigger companies are offering, right?

HARRISON

2:56 Yeah, I'm pretty familiar with service, right? Yeah, you're right? It is a good software. The problem is it's just not really designed for the commercial, you know, service side of things. Yeah, that's the, you know, the pretty recurring thing where, you know, with us being designed so specifically for the commercial, you know, I'll get people on here and W use like a residential software as like that sucks. It sucks. It's like, well, I mean, it really is a, it's a pretty decent software. It's just, it's not designed for what you're trying to use it. Yeah, I mean.

GERED

3:25 I've got a couple of my other buddies on it that have residential plumbing companies in residential H back companies because I send all my residential work to other guys instead of trying to do it all.

--- Type of work ends ---

GERED

3:35 And they love it, you know, for them, it works great, right? To show up. They can get their signature and get paid rate with the credit card rate on the app. And all that

stuff is just, we don't use any of that, you know, and then it's missing some of the things that we need, right?

--- Assets ---

HARRISON

3:49 Right? What kinds of features would you be looking for that service jobs and have?

GERED

3:56 Like some sort of built in CRM where we can put in, I put it in a customer, put in several sites or buildings, and then within those buildings, be able to record the equipment, model, serial number belts, filters, previous work that's been done on it, stuff like that.

--- Assets ends ---

GERED

4:16 So that when attack is, you know, like I'm going to be bringing guys into these plants and, you know, it makes me nervous because if they work on the wrong motor, right? Like a 60 horsepower three phase motor, you're looking at like 70 grand, right? So, yeah, if they're coming up to it, I want them to be able to, you know, on their phone, click on it and see, hey... you know, this guy has already changed the bearings six months ago on the bearings to started starting to go again. Maybe we need to start looking at the alignment, right? Maybe we need to start looking at how tight the belts are being put or whatever, right? Right. Sure. Well guys have a little bit more information. And then the other main thing and no, it seems so small. But at the end of every day, I need to be able to send a work order to the customer without sending a Bill. Okay? Because when we're working on the ammonia refrigeration... all those chief operators like to get something written that day of what was done so that they can give that to their team of, you know, maintenance guys and operators and stuff.

HARRISON

5:21 Okay. Yeah, we can, yeah, we can definitely touch on that.

GERED

5:28 Yeah. Yeah. Like it's only a couple of things that are missing that we need. It makes all the difference in the world.

--- Assets ---

HARRISON

5:33 Yeah, exactly. Cool. Yeah. So I'll definitely touch on that, you know, the service history, equipment history, you know, being able to separate like multiple locations, things like that. Yeah, would, so another big thing for us, you know, I was actually looking at notes and once you talk to us a few years ago, so I don't know how much you remember, but a big thing for us is going to be, you know, you go out, you know,

you find, maybe you find a repair opportunity while you're out there working on one of these refrigeration units, you know, maybe like a broken fans out or something like that.

--- *Assets ends* ---

HARRISON

6:08 Yeah, be unable to log that, you know, take a picture of it and then attach that to the quote as well. Is that something that you're doing now?

GERED

6:15 Yeah. So one thing we're using another, we're using another platform for doing quotes in the field because I have two guys in Vancouver that I'm going to be bringing out to Kalona, and like six months once we land, well, who knows it might be sooner might be the new year as soon as we land these other plants. So one thing that I've found to be huge is if I can let guys make quotes in the field and have the customer approve them right away. Okay. I don't know if you guys allow that within your like the software that I'm using now, I just have a markup algorithm based on the price.

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

GERED

6:56 It'll basically it'll do all the markups and everything based off of the net profit margin or console. So we always want to hit a certain net profit margin. So they put in all their information for time travel. So they work time travel time, how much the parts are gonna cost?

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

GERED

7:15 And then it spits out a quote right on the spot to the customer. And then the customer can just respond with the, with that email with a po or even just saying yes, go ahead with the work. And then we can get started on it right that day.

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

GERED

7:25 We found that we're able to turn work over at like over 200 percent more work if we're able to get that quote to them. Literally. Well, while they're standing there and hearing the motor rattle, their way more likely to approve it, right?

HARRISON

7:38 Yeah. Yeah. So couple of a couple of things on that first of all is we definitely do have the ability to quote out from the field.

--- *Access to information* ---

HARRISON

7:45 We're capable of doing that. I think it's a feature that I don't have turned on online. So what I would do is like I said, I don't have it turned on all my mobile app, but we can't do it. I'll probably just send you some information about it as well.

--- Access to information ends ---

HARRISON

7:59 I just want you to know that we are, you are capable of doing that. Okay. Another question too is if you're quoting from the field, would you also want to invoice from the field as well?

GERED

8:09 Invoice from the field. I think we're going to go away from because like we did that a lot with our restaurant customers, but... I don't know if we're going to continue doing smaller refrigeration, because what I found is the last time I talked to you guys, we were heavily in like the restaurants, we were still doing residential stuff and it was just before COVID and then, so I didn't want to pull the trigger until, you know, till we figured out what was going to happen with COVID, and then.

--- Pricing ---

HARRISON

8:38 Which is understandable. You know, a worldwide, right? It's understandable.

GERED

8:42 Yeah. So especially because of like the deal, I have the service mate, I was one of the first customers when they very first started up. So back then they only charged per job. Okay? So the, so if you, so the very first customers, we got 53 jobs a month. Okay? So I've never paid. I've donated money to them. Like every year. I give them 500 bucks. Does that feel like I should be paying something for their spot? Who is ask them? And they're like, no, like your, why don't you know, I think I'm customer, I'm like within the first 100 customers.

--- Pricing ends ---

GERED

9:18 So they're like, no, you're on our legacy contracts. So until you leave, you get a ride this out. So that's why I have stuck with them through COVID because I'm like, well, I don't even know.

HARRISON

9:27 Yeah. Yeah. Yeah.

GERED



9:28 All the features, do I get the, I get the full deal on it? So COVID where like, you know, what? Let's just try and tram.

HARRISON

9:36 Our costs as much as...

GERED

9:38 Possible, which was a really good idea for us because we were able to make it to the other side where a lot of companies were having a hard time, right? Something that we did notice is that the food service suffered a lot, but all of our food production, they're like it just doesn't get hit, right? You know, with inflation going up, people just pay more for groceries, right? Like the food production places aren't gonna slow down. People are still going to be, so they might even home instead of eating out, but.

HARRISON

10:05 Forgot to you.

GERED

10:06 Yeah. So we're kind of changing our model. Well, not we are, we have over the last year changed. I changed the model anyways to go after more industrial plants, production plants, fruit and vegetable processing, plant, space, plants, slaughter houses and ice rinks, stuff that's super stable. Okay? So we've had really good luck with that.

HARRISON

10:30 Yeah, definitely. Well, cool. That gives me a really good idea of what you're looking for. I know you mentioned, you know, you're trying to group by a few tests. Yeah, if this does seem like a good fit, is this something that you would want to do before you added own new tech missions or what are you trying to wait? You know, until you added a few new people?

GERED

10:50 No, I will like based off of what I've seen last time you guys were my number one pick. Hi, just like I said, I just had to keep, I didn't know how long this was going to be, right? And I'm sure what was gonna happen with all they can do in place and was going to go up when they started printing money, how bad it was going to get.

--- *Type of work* ---

GERED

11:10 But basically, I want to go with you guys regardless of what happens today. As long as you have the same features that I saw last time, I was just basically waiting to reach back out until I started to get more of the industrial plants because I know these guys don't like to have guys with, you know, like smaller cruise.

--- *Purchase decision* ---

GERED

11:30 So I didn't you know, I had to wait until about this point until I was signing on some of the bigger food production plants until I could reach back out to you guys to know that I'm going to be adding guys on, right?

HARRISON

11:41 Right. Absolutely. Makes sense.

GERED

11:43 Hi, I'm at the point where it's like in order to compete with the competitors, right? I have to have it. So that's why it's like the chicken in the ag, right? Like, you know, if you guys don't take a chance on me, then it's going to be hard to beat the guys that are using other software, the same stuff, right?

HARRISON

11:59 Yeah, I get it. I get.

GERED

12:01 Yeah.

HARRISON

12:02 Well, cool, man. We will, we'll dive into the sync, you know, I'm not, you probably remember a lot of it but just give you a quick refresher on it and stuff. And, yeah, any questions, any comments, feel free to interrupt me throughout know we can keep this pretty conversational.

--- Purchase decision ends ---

HARRISON

12:15 Let me share my screen with you. Can you see that? Okay. Yeah, just say Harrison Miller on it. Okay, perfect. So I'm going to give you a little update on our background, yeah, who were working with what we're looking to do and things like that. But quick refresher, we've been around since 2012. We actually just had our 10 year anniversary. So we've been in the commercial service space for about a decade now, we actually have just over a 1,000 customers in North America as well. So, yeah, our mission has just always be only helping our commercial service contractors be more valuable to their customers so that you guys can grow your business in a more scaleable way past couple of years. You know, this could be two years have really boom years for mechanical contractors. We did a study pretty recently found the industry has grown by about 50 percent since the start of 2020. Really just means that fast growth is going to be the standard if you want to keep up. So couple of key takeaways that, you know, our top performing companies are doing to drive this growth. First of these is going to be operating efficiently. You know, we're very aware there's a skilled labor shortage in the market right now, just making it harder to find those good workers. So being able to get the most out of a lot of your resources that you're going to have is going to be critical. So, one way we're going to

help you out is by making the scheduling of your technicians as efficient as possible, fitting more appointments for the day.

*--- Customer engagement ---*

HARRISON

13:30 So these guys are spending less time driving around more time doing more billable work. We also wanna make sure that you have all that information from the field back into the office in real time. So you'll be spending less time on this double data entry. You know, from the office want to make that really see us a second way is going to be by attracting and retaining the best prospects. He's going to be those customers who trust the work. You do not only gonna pay you on time but aren't gonna have to do on pricing just because they already understand the value that you guys bring to them. And then lastly turning more repair opportunities into revenue. You know, when we look at our top performing companies, how they're reporting needs repair opportunities out in. The field and then converting those into quotes. It's one of the most significant things that they're doing to drive growth. So, our contractors with the best pull through efficiency, the reporting deficiencies on about 25 to 30 percent of their work orders, and then converting about 50 to 60 percent of those into quotes. So in other words, just to make it really easy for you guys out in the field to log in, you know, efficiency, make it really easy, you know, for you in the office or out in the field to quoted out and then just make it really easy for your customer to go ahead and approve that.

*--- Purchase decision ---*

HARRISON

14:33 So more processes, more tools just to give you some more at bats that is a background on us. Any questions before we dive into this thing?

GERED

14:43 Wait, because I think, I don't think.

HARRISON

14:45 Out of my questions will...

GERED

14:46 Be answered as you go through your?

HARRISON

14:47 Yeah. Okay, cool. So we will start right here.

*--- Access to information ---*

HARRISON

14:53 This is gonna be, so again, there's going to be three core views of service trade. You're going to have the view from your office. You're gonna have the view from your

technician out in the field. And then you're going to have the view that your customer would see on like quotes and invoices, what we'll walkthrough all three of those.

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

HARRISON

15:08 But we'll start right here in the office. This is going to be our dashboard. Essentially, it's going to be a high level overview of the different stages of your workflow. So for starters, you're gonna have your daily schedule. It's gonna give you a snapshot of who's going to be, where throughout the day... you're gonna have your overdue jobs without appointments. This is just going to be a good way to make sure that nobody's slipping through the cracks. So, maybe, you know, we had an, to recurrent work in, you know, scheduled out for October, but, you know, it was a busy month that a lot of service calls. Maybe we didn't get to every single one of these, you know, recurring preventative maintenance jobs. And so let it slip through the cracks. It's gonna put them all in this category right here. So we can go ahead and get those scheduled out. Our jobs without appointments are doing the next two weeks so we can see all of her upcoming work.

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

HARRISON

15:54 Again. Let's go ahead and be proactive. Let's get that scheduled out of our past jobs mark to be complete. So this is where, you know, out in the field, you're going to complete that work quarter. It's gonna come back here in the office in real time to check over, make sure everything looks good before we invoice out that customer.

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

HARRISON

16:11 After we completed it's, going to drop it down into this completed jobs to be invoice section. So, you know, the jobs completed. Now, we know just which jobs need to be invoiced out.

GERED

16:20 And not just the preventative maintenance but all the service work in and projects are gonna get dropped into that category as well.

HARRISON

16:25 Correct. Yes, sir. Yeah, the standard all day. Cool. Any questions on this dashboard so far? Nope. Okay. No, yeah, you kinda mentioned this too, but I know you're doing a lot of preventative maintenance support. Are you doing a lot of like service calls as well? Yep. Okay. So we also, we have this dashboard right here pretty cool. It's pretty easy to understand. But essentially, this is going to let you know who's going to be where throughout the day. So if you look, you're gonna have your technicians on the left hand side, they're gonna have their swim lanes, and then you're going to see exactly, you know, what job they're at for how long throughout the day, you know, say we get how scroll down to me, yours isn't gonna quite. Those can be quite as good right here. Yep. So there's the right there. So you can see I'm at

this point at fitness in Raleigh till about 10 o'clock you know, say we get a service call, we can just click add a job. Yeah. Yeah. Maybe the target called us, you know, I could just click on that. All that information regarding like the contact, you know, location, things like that. It's gonna pre-populates and then we can just go ahead and schedule this out. So, you saw I was at the job till about 10 o'clock maybe, you know, I'm in the area will scheduled me for 10 30 description of the problem.

--- Assets ---

HARRISON

17:44 You know, let's just say broken fan own refrigerator. It's gonna ask for asset or the piece of equipment that we're working on. You know, we can tie this back to your refrigerator.

GERED

17:57 So, they're also everything we enter in for that customer is going to be in there.

HARRISON

18:02 Correct.

--- Assets ends ---

GERED

18:02 Exactly.

HARRISON

18:04 So this is someone elses, companies. They don't actually have a refrigerator, but I mean, you understand?

GERED

18:09 Yeah. Yeah. Yeah. Yeah. I get what's going on here.

HARRISON

18:12 There we go. So description and maybe the person that called, they don't know what's going on and they just know it's broken. Yeah, we'll just say Texas tech fix a sap from here. I could just schedule out who I wanted to go to. So I'm just gonna scheduled to myself. I'm gonna click save. So if you go down to me, I know have this job right here for the target on my calendar for about 10 30.

--- Access to information ---

HARRISON

18:34 So from the office, you'll be able to see exactly where I'm going to be at. But then also from your technicians perspective, it's gonna push them over a notification. Yeah. And then they'll be able to pull it up on their mobile app, what time they're

supposed to be there? What services are they doing? What location are we add as well? Okay. Yep... any questions on this?

--- Assets ---

GERED

18:54 Hello. Nope. That's one of the things that we're definitely looking for. I have one question. So I notice that when you were entering, it seems you clicked on that refrigeration, it had a category of refrigeration. So let's say if you clicked on a boiler, would it come up as category like gas getting or something like that?

HARRISON

19:12 Yeah, exactly. So that would be part of it as well. Whenever you get your stuff implemented into service trade, we have something called service lines pretty much it's just kinda filtered down exactly what kind of work you're doing and what piece of equipment you're doing. So, yeah. So we could do those service lines for your boilers as well?

--- Assets ends ---

GERED

19:30 Okay. So, and then I'm only asking because I'm one of the things that I was thinking would be helpful once you get a few guys and then I have somebody in the office doing dispatching. Can I set? Can I like, I guess how do I phrase this? Like if I got a guy who's got as a class gas, like if I got a guy who's more gas fitting and like, is there any way that he can, it can be like labeled when a gas call comes in? That like there's recommended people that have gasping experience for the dispatcher to send them to?

HARRISON

20:01 Yeah, absolutely. We can set this up as well. So hang on. I'll not going to get ahead of myself right here, but maybe for this one right here, you know, for this kind of job right here, what I could do? I don't have it set up, but if I wanted to, I could add what I call a preferred technician.

--- Assets ---

GERED

20:17 Okay.

HARRISON

20:17 So, maybe, you know, for what did I schedule something for HP AC unit? But, you know, maybe for HP HP HP AC unit jobs we only want Harrison to do you guys because he has the most experience to them. I can just make him the preferred technician.

--- Assets ends ---

HARRISON

20:31 So every time I make in one of these jobs, it's going to be assigned to me. Okay? You know, you can obviously go in and change that if you needed to. But, yeah. Okay. Cool. Any more questions on that?

GERED

20:43 Hello. I guess, can you do that for customers as well?

*--- Recurring maintenance ---*

GERED

20:46 Because I like to have only like one or two guys go into each customer. So the customer doesn't feel like they're getting a different guy every time.

HARRISON

20:53 Yeah. And that's something we can narrowed down as well, you know, kind of like what I just showed you may, maybe, you know, for this planet fitness location and Raleigh, we only won't you know, myself coming out. You can make me the per provide technician for a location as well, just so they're getting new salespeople. So I'll go right here. So I'm I actually are normally started this work order, but you brought up something interesting. So I'm gonna take this a step back. So, one thing that, you know, you mentioned you're looking for is being able to separate like the, you know, different locations and things like that as well.

*--- Recurring maintenance ends ---*

HARRISON

21:26 So I'm gonna take this a step back. This is my planet fitness corporate office through our system right here. You can see I have four different locations. So I have one for Greensboro, north, Toronto, one for Raleigh, North Carolina, one for Sanford, at one, for wilmington, what we're going to be able to do is because we are designed specifically for the commercial side of things.

*--- Recurring maintenance ---*

HARRISON

21:45 Is we're going to be able to separate all this different information, you know, between these different locations. So any services that I do at, you know, maybe the rally location, it's gonna stay with this rally location, any pieces of equipment, anything like that? So it's not really one of the things where, hey, I just have planet fitness and every single job from every single location is going to be jumbled together. We're going to be able to separate everything by location?

*--- Recurring maintenance ends ---*

GERED

22:07 Yeah, because I'm gonna have property management companies that are going to have like 10 or 15,000. Yes. So the invoices are going to go to head office, right? But the technicians are going to have to be able to separate all that information between the towers because they're not gonna pay the Bill unless it's you know, the right?

*--- Recurring maintenance ---*

HARRISON

22:23 Yeah... exactly. I'll show you exactly how that works too, but say, you know, I click into this Raleigh one right here. So I'll be able to see all this information. So, you know, I made you though, okay, owner, the owner or the onsite contact, whatever it may be for maybe one this property management things, you know, any services, any jobs that we've ever done, I'm specifically at this rally location, you'll have access to all of that, you know, any assets or pieces of equipment that we work on at the specific location for Raleigh.

*--- Recurring maintenance ends ---*

HARRISON

22:55 Yup. We have that any deficiencies that have ever been discovered while we were out at our location at that job site? Okay?

GERED

23:04 Well, I do have a question about that if you don't mind me interrupting. Absolutely. One thing that we did in Vancouver that was really good... really brought people to being emotionally invested in the success of the company was profit sharing.

*--- Quoting ---*

GERED

23:19 So when people made quotes are brought up deficiencies, we gave them like tech leads. So it was like one percent of whatever accepted quotes that they brought into the salesman and stuff like that. Okay. Is there any way to track that with your guys, a software or do we gotta do that on a separate one?

*--- Tech time tracking ---*

HARRISON

23:36 No, absolutely. So what we could do for that and this might not be exactly what you're looking for, but I think is going to be kinda right up your alley. So we could go right here into what we call our tech scorecard. So we're going to be able to track your technicians, you know, from each job, you know, how long they spent in route to a job, how long they actually spent on site. But this text scorecards can provide a little extra information. So maybe I mean, you can toggle this filter however much you want. But maybe I just wanted to see for this week right here. So it's gonna have each one of your technicians and you can see, you know, in total how long they spent in route to the job, how long they spent on site to the job, how long they spent



prepping? So, you know, we can see this guy right here. They weren't 55 hours this week. You also be able to see, you know, he had six jobs that he was on time to two jobs. He was late to. And then we're not, he had six jobs total this week to, he was late two and four.

--- *Deficiencies* ---

HARRISON

24:33 He just straight up missed. But we also have this revenue right here. So, yeah. So say they go out to, you know, work on HP AC unit and maybe they find a broken compressor and they get that quote sent out. They get it approved. This is that money that or the extra revenue that they brought in for you?

--- *Deficiencies ends* ---

GERED

24:51 That's exactly what I need to know. I just need to know what the total value of the quotes that they put out the expected. Yeah. And then I do like a bonus structure like a profit share based off of that?

HARRISON

25:04 Yeah. So, yeah. So, so this is exactly what this is, you know, what a lot of people they'd be like competitions and stuff.

--- *Quoting* ---

HARRISON

25:09 Yeah, who can generate the most money and stuff? But, yeah, say, and this revenue, it's going to be all those quotes that they send out that got approved. Okay. And again, you can do that for any time range that you want as well. But I just have to set for a week.

--- *Assets* ---

HARRISON

25:22 Yeah. Yeah. So I can back it. Yeah, that's right? So we have any deficiencies, any quotes, contracts, or anything like that. So you're gonna have all this information that's specific to this location also, you know, I, this is like a job or work quarter that I created for us, you know, just to kind of walkthrough today through today.

--- *Access to information* ---

GERED

25:44 One more, one more quick question. So eventually, when like when we bring on account managers and sales staff, are they going to have access to those deficiency lists for different customers?

HARRISON

25:56 Yeah. So kind of how this works is anyone from might be office standpoint that also log in for this, you can have unlimited people that the only way that we Bill because I think Emily might have talked to you a little bit about it. But the way that we Bill is going to be by the number of technicians out in the field. But anyone from the office side that will have access to this information is 100 percent free. You don't have to like buy a license for him.

GERED

26:19 Okay. Okay.

HARRISON

26:20 Yep.

--- *Recurring maintenance* ---

HARRISON

26:21 But yeah. So this is what the job is gonna look like. You know, like we were saying earlier, yeah, the location that we're working at the location, we're going to be billing to contact information, whether it be like the owner or maybe the onsite contact for this location.

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

HARRISON

26:35 If we click right here into appointments, will be able to see a description of what services needs to be completed, what piece of equipment we're working on, what technicians working on it, you know, estimated pricing, estimated duration, things like that. Yeah, parts labor in items. So we'll be able to see, you know, this part, favorite items are going to be needed to complete this job because this right here is a recurring job. All this stuff is going to be loaded in from a template. So you're not going to go in and manually type out this, you know, fill in this information every single time we're doing an annual inspection or something. We have this clock events. So I'll show you how those work a little bit whenever we got to the field, but we're going to be able to track them by in route on site and job prep.

--- *Assets* ---

HARRISON

27:14 So whenever they clock in, clock out, all these tabs are going to be reflected back here. We have the asset or the piece of equipment that we're working on. So, you know, we can see the location, maybe manufacturers make model, serial number, things like that. So you have all that information. We can also click into it if we wanted a little more information on it. This is going to provide us, you know, the information on like that service history, you know, any jobs that we've ever done specifically on this piece of equipment, you know, any deficiencies that have ever been found.

HARRISON

27:46 So, you know, we're making the right recommendation. So our customers. So maybe the last three times, you know, we keep finding this specific problem but we haven't replaced it yet. You know, we can convey that to our customers know, and, you know, bring in a little extra revenue.

--- Assets ---

HARRISON

27:58 And then like any quotes and things like that last couple of things is any comments? So this would be visible to your technicians out in the field as well. But if you just wanted to add like little comments that to help them complete the job a little bit easier, like maybe like a gate code, alarm code, you know, bring this piece of equipment or something like that?

GERED

28:15 Yeah, like if they need an extension ladder or whatever.

HARRISON

28:18 Exactly. Maybe I could just say, you know, bring tall.

GERED

28:23 Yeah.

HARRISON

28:24 And...

GERED

28:25 Yeah, that's a big...

HARRISON

28:25 One I'm sorry, what was that?

GERED

28:27 Workloads would be a big one.

HARRISON

28:29 Yeah, exactly. So, you know, they're not having to call you. Hey, how do I get in here? They can just pull that up and then lastly like any attachments and stuff too. So I don't have anything added to mind. But if you wanted to include like a, you know, a map, a diagram, instruction manual and how to work on a piece of equipment, we could add this and to be visible to the technicians out.

GERED

28:48 It as well. Okay. So I got a question. So let's say, you know, one of the pieces of equipment is a boiler. It's a basement, you know, 5,000,000 B to you boiler and am I able to attach the IO em, like Installation and man like the Installation manuals to those pieces of equipment. So that way you guys aren't googling it when they're in the basement buildings and stuff?

--- *Forms* ---

HARRISON

29:10 Yeah, you definitely can. So it would just, you would just make that like a PDF. Yep. I normally have them, but yeah, you just load a file. I don't know which ones I have, but yeah, yeah, we, it could just be a PDF and you would just upload that and it'll be, they can pull it up on their phones. Yep. Absolutely. Any questions from this work quarter?

--- *Access to information* ---

GERED

29:33 Nope. No, that looks pretty good.

HARRISON

29:35 So, I'm going to go out to the field again. This is the same job we were looking at just from the field view. This is going to be compatible with any apple, any android products. You know, you don't have to go out and buy tablets or anything.

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

HARRISON

29:46 I just use my phone. It works fine. But like I mentioned, there are going to be three different clock events we have onsite. We have in route and then we have job prep as the technician. You know, I'm on the way the job, I can click in route and it's gonna log me into that. I can also click into this. Maybe I wanted to notify my customer my expected arrival time. You know, I could push an email notification. It's gonna let us send them a picture of me as well as what time I was supposed to be there. So the customer knows who to expect and then also when to expect them. Yeah. But yeah, quick trip today's. Call clock out to be an it's gonna ask about one o'clock and on site. So I'll click. Okay. I'm just gonna clock me and so we're going to have these eight little blocks is really would no additional administrative work out in the field.

--- *Assets* ---

HARRISON

30:27 You're going to be able to see pretty much everything you need to get this job accurately and effectively. So, you know, what services are we working on... our end? What services are we doing while we're out there today? What piece of equipment or are we working on? We can even click into this right here. And you could see all that

information as well. You know, the location manufacturer and make model serial number, you know, as well as like that service history as well. So that's visible to you out in the field. There's job items there's, parts, laboring items that are going to be needed to complete the job? They'd have access to that information as well as if, you know, let's say you're on the way to the job. And maybe you had to stop like a vendor and pick up another piece of equipment or like another item or something. You could add this directly from the mobile app and it would just attach it to the work quarter as well.

--- Deficiencies ---

HARRISON

31:14 You know, kind of like what I was saying, one of the biggest drivers for growth for our contractors is going to be the ability to act on that pull through revenue or essentially like what percentage of your work quarters are gonna have improved repair? So we can click right here into deficiencies, and you'll be able to see any previous deficiencies that have ever been discovered at this location as well as making it really easy just to go ahead and log a new one. So let's just say we're out there and we find something that we could just click, add efficiency. It's gonna ask you to add a brief description. What's a pretty common problem you're running into?

GERED

31:49 The 1,000,000 different things. Let's just say weren't like one employees or bad bearings is probably the most bearing starting to go back.

HARRISON

32:01 Let's see what else, whether it be a close enough, you get the idea and just add a brief description. I don't have to go too far in depth because we also have the ability if you wanted to, you know, take a picture of the.

GERED

32:15 Perfect. So they can take a picture of the model and serial number of the part that.

HARRISON

32:20 Yeah, absolutely. Yeah. So you could do that on the deficiency. You know, you could also if you wanted to add a video, maybe recorded audio memo, you know, hey, I'm out here. So let's say job site, I, you know, there's a bad bearings. They need to be replaced, et cetera. Yeah, we could add those... before we go to completely log it. It's just gonna ask a few more questions just to make sure everything's accurate. It's gonna ask us to more of the severity of it. You know, we're going to say this is an operable, it needs to be replaced right now.

--- Assets ---

HARRISON

32:51 This can ask us to tied it back to the piece of equipment that we're working on. So we can keep building up that services free for the next time you go out there. So I

think there's jobs, HB AC unit, something tied it back to that one market is new.

--- *Assets ends* ---

HARRISON

33:03 And then we will go ahead and save that... kinda went a little tangent right there. So just want to pick a policy and just grab your thoughts on the mobile app so far.

GERED

33:13 Good, good. That's one of the things that we're really looking for is when guys are on maintenance, is I really want to set a standard for a certain amount of pull through rate because we're not making any money on maintenance is, but the maintenance is there have us in the building, right? So we should be finding stuff while we're in there not just for making money but also like, you know, customers don't get excited when they pay, you know, 12 grand a year to make sure everything's running. And then they gotta call you on Saturdays, double time. They come fix stuff because we weren't able to find it, right?

--- *Pricing* ---

HARRISON

33:46 The first time exactly. And then the other thing too is just be unable to add that extra level of detail. Like the pictures, the videos 100 per cent attach those to the quotes. How was I was on a meeting with some guy the other day? And he was like, yeah, you know, pictures aren't worth a 1,000 words to me more than 4,000 dollars. And I was like, yeah.

--- *Tech time tracking* ---

GERED

34:05 Hi, I'm not sure.

HARRISON

34:06 I was like, I really liked that. I'm going to start using that on every single.

GERED

34:09 If they can take a picture of the general thing, right? You know, I've been doing this for a long time. I can, I don't have to drive, you know, an hour, two hours out of my day for drive time there and back and go look at it and are trying to sit there on the phone while they're trying to explain to you what it looks like.

--- *Tech time tracking ends* ---

GERED

34:25 So, like things like that, if well, he's going through his maintenance is, you know, he can be pumping out those deficiencies and we can be, and we could be preparing quotes to send to that customer. You know, at the end of that day, I think that would be huge for us for our pull through anyways, right?

--- *Customer engagement* ---

GERED

34:40 Because, you know, especially on maintenance is we want to at least be drumming up... you know, we have our, we have our KPI'S of where we want to land, right? So I wanna make sure we're hitting those exactly if I can increase those then like you were saying, right? Like, you know, guys are impossible to find right now, but if I can have guys working at 20 or 30 percent more revenue per guy.

HARRISON

35:04 Yeah, exactly. What, which is how, you know, being able to get more quotes approved is how this is going to be like a revenue generating?

--- *Quoting* ---

GERED

35:12 Yes.

HARRISON

35:13 I think we did a study. I can't remember the... exact number, but I think it was with just stay with our customers and the quotes that had multimedia and the ones that did the ones I had multimedia were approved. Like it was like five times more likely or like five times faster or something like that.

--- *Quoting ends* ---

HARRISON

35:29 So it is pretty important to be able to have that. But anyway, a couple of more important things here. First off, I know I mentioned, I don't have it set up, but you do have the ability to quote through here as well. I'm gonna make a note so I can send you some information on that. One question I had is, do you have or a couple of things first of all. Do you have like maintenance contracts, maintenance agreements, things like that for your customers? Okay? Is that just like a piece of paper?

GERED

35:58 Much? Yeah.

HARRISON

35:59 Okay. What we could do for that is if you click right here into view, more details... we click onto, wanted to do that.

--- Forms ---

HARRISON

36:10 You more details... download blank paperwork. So essentially this is going to be wait for the little quick... wanted to have... one second.

HARRISON

36:33 Here we go. So this is going to be those maintenance forms, maintenance agreements that you already have. But what we'd be able to do on our end is we could turn it into a billable PDF, correct?

--- Assets ---

HARRISON

36:45 Yeah. So all that information like regarding like the location, customer, piece of equipment, whatever it may be, you could just go in here and you check off the boxes maybe. Okay. Not. Okay. Add any notes directly from the mobile app, and then.

GERED

36:56 Hello?

HARRISON

36:56 Your maintenance form directly from here. So I could just, you know, one last piece of paper you have to carry around.

GERED

37:02 So when somebody is doing the maintenance, I'd say they're on a building. It's not 10 rooftop units. They check all 10 rooftop units. Can I have them fill out one of those PDF? Because right now they're filling out a piece of paper for per piece of unit and then we have, and then we have that into the customers. So here you can see what each piece of equipment as like the conditions of it. Are we able to do that? So when you guys do in a maintenance, he can pull up each piece of equipment and fill out the like, almost like a checklist.

HARRISON

37:32 Yeah, absolutely. Yes. So you're saying just take that one piece of paper and just make it like one big one.

GERED

37:38 Kinda like let's say there's 10 rooftop units, one individual one. So like if our, to you three, you know, has crappy bearings or that condenser fan motor sounds like it's starting to go or something like that, he can.

HARRISON

37:52 That out.



GERED

37:52 On that paper so that when the end report, each piece of equipment has its own little tiny let's say nine point checklist so that I can go through that and look at it and be like, okay, so, you know, we've got, you know, problems on this one.

--- Assets ends ---

GERED

38:07 Problems on that one, this one has high super heat. Maybe we need to go spend, you know, see if the customer wants a service call on that.

HARRISON

38:14 Right. No, I know what you're saying. Yeah. So I don't really see why that would be a problem. So, essentially all this is right here, is we're just taking those forms that you already have and we're just convert them into our system. So, I mean, in terms of that, like, I mean, that's how was kind have set up now then? Yeah, we could do it. And then like maybe like, you know, like you're saying like maybe in, instead of like one for each one, just kinda make it one big thing.

--- Tech On-site ---

HARRISON

38:40 I don't see why we couldn't do that for you. Last question I had was, you know, are you going to have your guys collect signatures while they're out in the?

GERED

38:51 Yeah.

HARRISON

38:52 Okay. So we could create for that, what we call it work acknowledgement. So essentially, you would just pick the onsite contact, you know, have them review this straight from our mobile app.

--- Quote templates ---

HARRISON

39:03 And I really what this is gonna say is, you know, hey, I'm here similar, these are the services that I completed today. These are the parts labor an items that we saw, you know, these are the efficient, you know, I did find, you know, a bad burying while I was out here, you know, either expect a quote from the office or I'm gonna go ahead and send you out this quote right now directly from the field.

--- Tech On-site ---

HARRISON

39:25 So from there, you know, that content can just confirm this side sign that aren't confirmed the terms and conditions, you know. And then you could just go ahead and sign off right there. And then you have your signature back in the office. Really, the only thing left to do here is we'll just go ahead and clock out for do that. It's just gonna ask to mark off all the completed services, make sure we did everything that we were supposed to do, what we did so well, mark off on that and we'll finish in clock out.

GERED

39:55 Perfect. Cool. So I can set those checkless... that's really good because I'd like to set some things.

--- Assets ---

GERED

40:02 So then it guys at the end and go through it and be like crap. I didn't look at that piece of equipment in the basement.

HARRISON

40:08 Yeah, yeah, absolutely. Yeah. So so again, just one final checklist... let's see. So back in the office, let me go back to our job.

--- Assets ends ---

HARRISON

40:17 So I know you mentioned it's, going to be a lot of quoting from the field. Are you going to do any coding from the office at all?

GERED

40:24 Yeah. Okay. Yeah, because I'll have to set like a limit that guys can quote from the field. Okay? It's just, you know, different guys will have different levels of the ability.

HARRISON

40:34 Well, and so that's what I was about to say too. So a lot of this stuff with service trade is going to be very customizable in terms of what you won't you know, your guys out in the field to see. So maybe you have one technician, you really trust, you want him to be able to quote, you want him to be able to invoice, you trust them with that information. We could turn it on for him. But maybe you have a couple of others that I don't want that information for it. We can leave it off on a case by case basis. Okay, we can even get it small enough to, you know, we have some people they only want their technicians seeing like the, you know, like the hours are supposed to be on a job or like pricing and stuff. And I mean, if that's something you want, we can cut that out for you as well.

--- Deficiencies ---

GERED

41:11 Okay, perfect.

HARRISON

41:13 But, yeah. So anytime one of your technicians discover is like a repair opportunity and efficiency out in the field, it's going to send you in the office and notification email notification. But if you click on the link, it's gonna take you to this deficiency board right here. So essentially, what this is gonna tell us is what was this, is the customer at this point? No, sir. So, so we're back in the office right now, this is from your perspective. Okay, perfect. Yes. So this is going to tell you what was found at what location, you know, during what job, what technician founded, but it's also going to have all those attachments from the field as well or church or audio memos, as well as any related deficiencies against that. We're making the right recommendation to our customers. Hey, we keep finding this problem. You know, we need to go ahead and fix.

GERED

41:55 Yes.

HARRISON

41:56 From here, it's going to be super easy to go ahead and quote this out. We're just click add to quote and then create a quote.

--- Quote templates ---

HARRISON

42:05 So on this quote page right here is going to have, you know, our pictures or audio memo as well as the efficiency gonna flow really easily from the field to the office and then fire back to your customer. Yeah, that's another thing our customers really like is if it's a problem you're running into pretty regularly, we could apply a quote template to it. So I'm just gonna use a compress, replace that because I know the verbiage is good, but this is essentially, it's going to be your own verbiage.

GERED

42:31 Yeah.

HARRISON

42:32 Standard verbiage standard parts labor, the items that are used to complete this job, we could just go ahead and load all this stuff in. So you're not.

GERED

42:38 I can edit it from this point, right? So I can kind of make one like a template that's bare bones and then quickly add things in for different compressors.

HARRISON

42:45 Yeah. Me, this info. Yeah, any unique add stuff. You can take stuff off. But yeah, again, just don't have to manually type that out from here.

--- Deficiencies ---

HARRISON

42:55 Super easy. We'll just go and click send a customer. You know, you have our, you know, our verbiage right here, our pictures or audio memos. Again, this stuff can be very edible as well. Yeah, maybe we want to include the picture, but the audio member there's no, tell him what the technician was saying while he's out in the field.

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

HARRISON

43:10 Maybe we don't want our customer here and that will just talk, would just toggle that all still visible to you in the office. We just don't have the customer hearing.

GERED

43:17 Okay, perfect.

HARRISON

43:19 From there, which is click on the contact that we want to send it to and we'll click send. Okay. So I sent that to your email, but I'm gonna pull this up on my screen as well. Let's see. We can walkthrough this real quick. This is what a quotes gonna look like. From your customers perspective. Whenever they receive a quote from you through service, trade, top left hand corner is going to be your own, you know, company's logo, just give it a more uniform look when everything going out, description of the work, those parts labor, an items, you can see, we have the picture but no longer the audio memo anymore. But probably my favorite part is going to be in this. Top right hand corner is going to be this big green and approve button. It's going to give your customer first the ability to approve this quote directly from this email that we're sending out to them. I mean, they can just add the po number, you know, check and then click approve.

GERED

44:10 Yeah, because a lot of times like especially with the property management companies, we're just sending it, you know, to that territory manager. And then they're just if they can just approve it right from there, obviously, you know, when there are new customer, they're gonna wanna talk about it and stuff, but, you know, soon after that, that's the faster we can streamline it and the easier we can chat them to hit that green button. Yeah, they'll just keep doing it and then they just, you know, yeah.

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

HARRISON

44:39 No, absolutely. And you know, kind of our mindset on this is, you know, it's so much. It's you know, human nature to go ahead and approve something to quicker whenever that work still top of mind. So, so we want to get this from the field to the office really quickly and then have it sent out to them really quickly because our, you know, hey, he was here 15 minutes.

--- Quoting ---

HARRISON

44:57 Can I get a really good job? Let me go ahead and click this button and approve the quote. Yeah, no, this is pretty cool too is how go ahead and approve it on my end real quick and show you what happens. So back in the office right here, a quick status is going to change from submitted to approved these two two new buttons.

--- Quote templates ---

HARRISON

45:13 Right here. We're going to appear. If I wanted to create a job. From this quote, I could take this quote and I could push it over to a new work quarter. Yep. Or if I wanted to add this to an existing job, you'll pull up any existing job at this location that we're working at and just...

--- Quoting ---

GERED

45:29 She only the open jobs, right? Or is it pulling up the closed jobs as well?

HARRISON

45:32 Yeah. So it's just gonna be the open jobs.

GERED

45:34 Okay, perfect.

HARRISON

45:35 Yep. And yeah, so we can just push the quote to them. Another thing that's pretty cool too is, you know, we're able to track any interaction that a customer has with the quote. So anytime you know, someone views it, I can see the TV, this a 242. Anytime someone approves it, you're going to be notified. So maybe we...

GERED

45:54 They can't say, I haven't seen it yet.

HARRISON

45:57 Exactly. It's like you did see it, you saw at seven times?

GERED

46:02 Yeah.

HARRISON

46:03 So, yeah. So, so maybe we sent something a couple of days ago was reviewed five or six times. Yeah. Hey, maybe we want to follow up on that and see what's going on.

GERED

46:09 Yeah. Yeah. Yeah. Maybe they have a question and then they just haven't reached out yet or whatever.

HARRISON

46:13 Exactly. Exactly.

GERED

46:14 I really liked that because I'd like to follow up from previous experience when we started doing quoting from technicians quoting from the field. We saw that like 200 percent up stroke, but also just following up within 24 hours, just a simple call because they might be on the fence and then they go to lunch and then they got 17 fires to put out. And then you just got forgot about.

HARRISON

46:36 Yeah. Can we?

GERED

46:37 Use that knowledge to get them to quote again, same with the paying, right? Sometimes it's just, it's as easy as an email, an automated email that goes out 25 days before the net 30. And then all of a sudden, just eight, right?

HARRISON

46:49 Yeah. Well, and then some kind of cool to just kinda talking about that nuts right there is if we go right here tour, we can go run a report, all of our quotes. So maybe I want it because we're able to track that. Maybe I wanna see, you know, maybe for a specific customer or maybe for a specific date range. Maybe I wanna see all my quotes that have been submitted and viewed where they haven't been approved yet.

GERED

47:11 Perfect. Yeah, that's perfect.

HARRISON

47:13 Exactly. You could run a report on that, send them one off or if I wanted to books and all of them, it would just resend that quote to them, just put a top of their

inbox, just keep it top of mind.

GERED

47:22 Yeah. So in the new year, one of one of the plans is to add a salesman to drum up work for the spring and summer. I want to, I want to pay this. I want a salesman that wants to work on commission. Is there a way to track what the salesman is putting through and what's getting approved? And I can pull a report on that in order for the pay the salesman?

HARRISON

47:47 Let's see.

GERED

47:49 You know what I mean? Like, I like, I see you have salesperson up in there, right? So, like... I'm just wondering like can, like, how would I, how am I gonna pay the salesman based on commission? Am I gonna have to go through and manually pull? All? Like, is he gonna have to record all the quotes that he gets approved? Or I'm just wondering how that's gonna work?

HARRISON

48:08 Yeah. So I'm not 100 percent positive. And I don't want to tell you know, any wrong information. Yeah, if I had to take a guess, I would say just because, you know, we are able to track who's sending these quotes out and stuff as well. I think, you know, because, yeah, the salesperson right here, you could just keep track of it that way. Yeah, you know, so I don't think it should be a problem.

--- *Type of work* ---

GERED

48:31 Because of how we have this structure on the industrial side is normally we'll just have account managers slash salespeople. So they'll do everything for let's say two two or three big customers or maybe five small customers or 15 or 20 smaller customers. So, what I'd like to do is just have those guys and have those customers basically their territory and they just take care of everything that customer needs.

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

GERED

48:57 But I need to be able to pull the, I need to be able to make sure that they're getting compensated to make sure that incentive... right?

HARRISON

49:06 Yup. Exactly. Like I said, I don't see that being a problem with us, but let me whenever I get off with this, I'm gonna do my homework on that too, and I'll see if I can find a video or article about how exactly that works. I'll send that over.

GERED

49:19 Yeah, yeah. I was just, I was just wondering because like obviously, I've sat through a bunch of these and, you know, with FieldEdge and building ops and all those other places and some of them had it. Some of them didn't but it's not a it's like it's not a deal killer, but it would definitely be huge if we could nice analyst reports and that would, you know, any extra minutes that I don't have to spend combing through job reports, I can spend making money, right? So.

HARRISON

49:46 Exactly. And we're at...

GERED

49:47 Least maybe sleeping or, you know, whatever else?

HARRISON

49:50 Yeah. Let me, I'll make a note of that too, so I can find that.

GERED

49:55 And the other thing too, I wanna make sure everybody's getting compensated properly, right? Exactly. I don't want guys going above and beyond and, you know, getting a bunch of work on and then not getting recognized for it.

--- Invoicing ---

HARRISON

50:05 Yep. Exactly. No. I completely got that. Yeah. So I made a note, I'll figure that out. Last thing I wanted to show you is the invoicing. So if I'm back here into the office for offer, also forgot to ask. Are you on like a Quickbooks or something?

GERED

50:22 Among Quickbooks? Yeah.

--- Accounting integrations ---

HARRISON

50:23 Okay. Are you on desktop or online?

GERED

50:26 Online?

HARRISON

50:27 Online? Okay. I don't know why I asked that we integrate with both of them. Well, I don't know why I asked like an added but yeah, so, well, we do have an integration with Quickbooks perfect. So, you know, we completed the job really the, or we, you know, quote did our work quarter, we quoted out really the last thing to do from the office.



--- Tech On-site ---

HARRISON

50:44 Then it's just go ahead and invoice it out. So what we're gonna do is we're gonna click right here, complete... the job and create the invoice because, you know, our general rule of thumb is, you know, for a lot of the technicians, they're going to be really good at what they do out in the field, but maybe I don't want them all handling a lot of invoicing and things like that. I want to, I want the office to, you know, the understands that says.

--- Paper process ---

GERED

51:06 Like is for the account managers to be someone like graduations on a daily basis, right? Helping them out the quotes, making sure things are getting paid overlooking invoices before they go out to make sure everything's on their properly stuff.

HARRISON

51:19 Exactly. And that's exactly what this would be right here.

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

HARRISON

51:22 So, all that information from the work quarter is going to transfer over to this invoice. But, you know, say we're checking over it, make sure everything looks good. You know, obviously we don't want this, you know, negative 40 percent margin. So I could go in here and I could, you know, change pricing on all this stuff right here to however, you know, however you want to do it, maybe the detail level you want your customers to see, maybe they just want the grand total only or something, but that is.

--- ST app contracts and pricing ---

GERED

51:48 When I put in my unit cost... am I able to have like an auto markup for? I guess that's more than the quoting process, but I'm just looking at like let's say like this are 22. My cost is 100 bucks. Can I have it? So it automatically populates a unit price with a certain margin?

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

HARRISON

52:07 Yes, that's it that's exactly how that would work. Part of your implementation would be getting that pricing and items like mock ups and stuff like that pulled in for you. But yeah. So let's go ahead and save that. So our invoices a little bit better now, so to invoice it out to be really easy, worse and click send invoice link. And I'm gonna pull up just a preview. So not spamming your inbox, but this is what the invoice is

gonna look like from your customers perspective. Okay. So, you know, top left hand is going to be your own logo. Again, all those parts labor, an items, you know, terms and conditions. And then in the top is going to be that big green pay now button just like on the quotes. So they can pay directly from this invoice. They pay with a credit card. They can pay AC, H. Another thing that's pretty cool too about this is going to be this blue arrow, the service details. I really liked this, you know, with us working so specifically with the commercial service side, you know, a lot of times the main point of contact is not going to be on site. So we can send this over as kind of provide a little extra level of information.

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

HARRISON

53:08 So, you know, what services to be complete, what parts labor in items were used to complete it? Yeah, no, that signature from the contact on site. And then of course, our pictures. So maybe like a before and after picture, you know, a video, stuff like this. So now we're focused more on, yeah, the work that we actually did for you rather than just the pricing of it. Yeah, absolutely. Well, cool. That.

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

GERED

53:34 I do have one question.

HARRISON

53:35 Yeah.

GERED

53:37 Damn, it was important to you all to jog my memory.

HARRISON

53:42 Mostly, I'm trying to think that, I know.

GERED

53:45 So on the invoice where it has the breakdown of all those parts and stuff. Yeah. Yeah, where it has that breakdown quantity price, all that stuff. We just separate ours by time and material. Okay? Is there any way for the invoice to just group all the material to one total and all the labor into one tool?

HARRISON

54:06 Hello... I would thinks I would think so because, you know, maybe detail level.

GERED

54:15 What we found is only one percent of the customers ask for a breakdown?

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

HARRISON

54:20 Okay.

GERED

54:20 And almost 80 percent of the customers, if you give them the full spread, we'll find one thing that.

HARRISON

54:26 Point about this wrong with it. Okay?

GERED

54:28 Yeah. So we found the least amount of complaints with time material and then specialty tools, stripe charges and stuff like that.

HARRISON

54:38 Try this one right here. See what this looks like?

--- ST app contracts and pricing ---

HARRISON

54:45 Nope, that's just line items.

GERED

54:49 Yeah. So like, I guess like the way we're doing it right now is a service mate, allows me to have line items into a category. So I put all the labor line items are all preset into a labor category, right? All every, all the material, right? I use the category materials and then it kinda groups them up in that invoice. So it's labor total cost like labor, you know, whatever many hours total cost and then material?

HARRISON

55:18 Cost. Yeah, no, I'm following you. Yeah, I know exactly what you're saying. So I'm wondering because we can group it by the service. Yeah, I'm wondering like how like it because I think this is something I don't know which I'm gonna look up after this, but I'm wondering if this is like a, you know, in terms of separating these, is it kind of like what you see is what you get or can we on our end customize this to, you know, to break it down? Like how you're saying?

--- Quote templates ---

GERED

55:47 Yeah, yeah.

HARRISON

55:47 Because I mean, I don't see why we wouldn't be able too, yeah, because we can do again, you know, line item type, you know, grand total, only line item pricing and stuff. So there's a few different options we can do. I'm just curious on our end if we can, yeah, like add another section for you.

--- Quoting ---

GERED

56:02 Yep. Slowly, if you look into it.

HARRISON

56:04 Yup. Cool. Let me make a note of that. Awesome. Were there any more questions for me? Anything else you're really looking to see?

GERED

56:16 Nope. That was it just basically trying to... keep metrics on sales guys... key metrics on technicians, for approve sales quotes.

--- Tech On-site ---

GERED

56:31 And yeah, being able to send out a work. So, let's say I've got a job that's four days long and day one, it's got just tap on it day to Jeff and Mike, day three, just, you have a four, Jeff, Mike and Andrew, can I have them send work orders each day but not complete the job, an invoice until the very end?

--- Tech On-site ends ---

HARRISON

56:53 Yeah, yeah. You can definitely do that. So we talked about like multi day jobs?

GERED

56:59 Yeah. So like a multi day job, let's say day one, I recovered all the refrigerant, you know, put it into cylinders and then purge the system a nightstand the chief engineer that runs that plant, he's gonna want that in writing that day.

--- Tech On-site ---

HARRISON

57:15 Yeah. So.

GERED

57:16 But he's gonna want an email, not, sorry, not in writing, but he's gonna want an email. So like I'm wondering if I can just send a work order, right? For that day and then a work order for the next day, work order for the next day.

--- Tech On-site ends ---

GERED

57:27 So basically send a work order every day and then just send the invoice that has also hold the end of the job.

HARRISON

57:32 Yeah, that, that's something we'd be able to do too. So we have the capabilities for like multi day jobs like that. And, you know, on day one, Monday, I did, you know, we're doing XYZ day to we're doing XY and Z. So yeah, we can definitely separate those. And then, okay, if you want to separate these services and send them out to, you know, whoever own site you need to, we could do that for you. Yeah, I'll...

GERED

57:53 Hi, this is just to like to be able to send them.

--- Assets ---

GERED

57:55 That is the description of... just need to, I just need a write up a work description of what was that? Yeah, yeah, because they have their, they need it because now that system doesn't have any refrigerated at the refrigerants being stored in cylinders, they need something written from us saying that refrigerants been removed and that system has been purged that day in case like, you know, when he comes up to Inspect their plan?

--- Assets ends ---

HARRISON

58:24 Exactly. No. I know exactly what you're saying, what we can do that for you? Okay?

GERED

58:29 Yeah, that was my last question.

HARRISON

58:31 Well, cool. Yeah. So I have a note or a few notes of some stuff. I'm gonna look in for you. Would it make sense to run through pricing right now? Yeah, sure. Okay.

GERED

58:42 Here's my newest apprentice.

HARRISON

58:45 Hey, buddy.

GERED

58:48 You're in the background?

HARRISON

58:49 Yeah. I could. What is it a boy or a girl boy? What's his name?

GERED

58:53 Boat hyper VOB.

HARRISON

58:57 Yeah. You like that? How old is he?

GERED

59:01 Or months?

HARRISON

59:02 Man... man... I just, I, I'm at a weird H. So I am, I'm 24 years old. And so it's just, it's such a weird age because like, you know, I'll be getting on Facebook or like Instagram, and I'll see people my, I went to high school with or wherever it's like they're getting married or the head of kids that have been having kids. I'm like man, that is crazy. And then like what was like, well, I am 24 years old like your parents, I mean, my parents were married and had me whenever it before they were to ask for like, I mean, it's not that weird. It's just a, it's just such a weird H right now.

--- *Type of work* ---

GERED

59:39 Yeah, for sure, man for sure.

HARRISON

59:42 But yeah. So one question I had was in terms of those maintenance forms, maintenance agreements, how many of those do you have?

GERED

59:54 I mean, we've got the paper ones. I don't really like the paper ones I'd like and we're in the process of now that we're picking up the bigger industrial plants are pretty much remaking home.

--- *Forms* ---

GERED

1:00:04 Okay? So, I'm so over the, from now to the end of the year, I'll be making them but they'll probably be like 15 or 20 of them.

HARRISON

1:00:11 Okay.

GERED

1:00:13 Well, that's another thing I was gonna ask is when a technician gets to site, is there like a PDF checklist for like a Jha, for like it's like a safety audit before starting work?

HARRISON

1:00:27 I don't think so.

GERED

1:00:29 No way.

HARRISON

1:00:31 Don't think so. So. I guess my question for that is because I guess I'm a little ignorant on the subject. So what exactly would go into that? And so like what we needed?

GERED

1:00:43 Yeah. So Jha is just the job hazard assessment. So before you start any job in an industrial site, you'll stop and then you gotta fill out like if you're gonna use a ladder, you got, you know, you click on it. So right now, with service mate, right? Like I built the checklist so that, you know, if somebody is gonna use a ladder, they click yes, and if they click yes, then they're gonna write in a hazard and how they're going to mitigate it, right? So like, you know, hazard falling, you know, use three point contact, you know, don't use the top two runs, whatever they write in there and then let's say they're going to be working on live electrical.

--- *Forms ends* ---

GERED

1:01:18 They can click yes, and if they click yes, then they'll be like a little safety description from our company safety policy, and then they'll be like a little write up for them to write in their specific answered, right? Like what they're going to be doing, metering live controls, right? And then a little write up on how they're going to mitigate the risk just in case anything happens that kind of protects us and it.

HARRISON

1:01:39 Right. Okay. Yeah, that makes sense. So with that too, I have no idea.

GERED

1:01:45 Okay.

HARRISON

1:01:46 So, I, so I added that to my list of stuff.

--- Pricing ---

GERED

1:01:48 Yeah.

HARRISON

1:01:49 For you as well.

GERED

1:01:50 Okay. Perfect.

HARRISON

1:01:51 So, I have a checklist. So I'll send that stuff over to you. So in terms of pricing, I don't know if Emily mentioned it to you, but we do have a five device minimum. Yeah. So I'm obviously, I'm gonna recommend do for our lowest package. So it's gonna cover everything that I showed you today, but you're looking at about an annual subscription of about 5,300. We do charge a one time onboarding that's gonna cover the work. We're going to guide your information pulled over. That's going to be 1,750. So in total, your first year, you're looking roughly about seven grand. And then every year after that about 53.

GERED

1:02:22 100. Okay. And then that's including the five tax.

HARRISON

1:02:26 Five tax, yes.

GERED

1:02:26 Sir. Okay.

HARRISON

1:02:30 Yeah. Is that kinda been range for you? Or?

GERED

1:02:35 I mean, it kinda, it is, it's hard because I'm gonna have like four, not used licenses until I can fill those spots and, you know, it's obviously not, it's easier to add guys to a residential company than it is in, through an industrial company, right?

--- Purchase decision ---



GERED

1:02:49 Yeah, hard to find those guys. So... I mean, we gotta do it. I'll just have to try and figure out, yeah, I'll just have to try and figure it out.

HARRISON

1:02:59 Okay. Yep. That makes sense. So, what I'll do on my end then is this is through Zoom. So it recorded.

--- Purchase decision ends ---

HARRISON

1:03:08 So whenever like transcribes, I'll send you over a recording at the conversation. I'll also, I'll type up a quote for you as well. So you have the numbers in black and white sick, I mean.

GERED

1:03:16 Yeah.

HARRISON

1:03:16 All that, and then I'll also get those answers for you as well. It might be Monday before I get those answered for.

GERED

1:03:23 That's fine, man, Friday and stuff, but.

HARRISON

1:03:26 Yeah. So I'll send over to you. When would be a good time for me to follow back up with, you know, just answer any questions, you know?

GERED

1:03:33 Just whenever, like whenever you have that other information that'll give me time to sort it out.

HARRISON

1:03:37 Okay. Well, yeah, that sounds good then. Well, then in the meantime today, I'll send you over the quote and the recording and then we would just we'll talk probably next week sometime whenever I get.

GERED

1:03:47 Okay, awesome, man. Thank you.

HARRISON

1:03:49 Yes, I have.

GERED

1:03:50 One, one other thing. Do you guys have a customer portal? So the customer can sign in and see some of this stuff?

--- Pricing ---

HARRISON

1:03:55 Yes. So we do have a customer portal, I'm gonna go ahead and be honest with you. It's an add on feature. So, yes, as part of our premium package?

GERED

1:04:05 Yeah.

HARRISON

1:04:06 So that roughly five grand that we were looking at with premium, it's probably going to be W, to have that feature in it? Okay? So, I mean, yes, we do, but...

--- Pricing ends ---

GERED

1:04:17 Yeah, yeah.

HARRISON

1:04:18 I mean, I went with, you know, this being kind of the higher into your budget right now anyways, I probably recommend less, yeah, stay away from that for.

GERED

1:04:24 Yeah, yeah. Yeah, for sure. Okay. Yeah, no, I just wanted to know because I'm just wondering what that feature would look like and how beneficial it would be to the customer because sometimes things, they seem good. But if the customer's not gonna use it then.

--- Customer engagement ---

HARRISON

1:04:37 And what does it actually matter?

GERED

1:04:38 Yeah, right. Like if it's not, if it's not making the customer any happier and it's not bringing any money. And then what?

HARRISON

1:04:45 Yeah, no, yeah. So I'll send you some information about the customer as well, so you can just see it. But, okay. Yeah, it's just something I want you to keep in mind

to whatever.

*--- Customer engagement ends ---*

GERED

1:04:53 Yeah. Looking at it that just.

HARRISON

1:04:54 Like everything we just looked, that is like this is going to be double just for this feature right here, so.

GERED

1:04:58 Yeah, yeah. Okay.

HARRISON

1:04:59 Perfect. Well, cool. Man. I appreciate it. Have a good weekend.

GERED

1:05:02 Yep. You too.

HARRISON

1:05:03 All right. Talk to you later bye.

GERED

1:05:05 Bye.

*The End*