



ServiceTrade/ UMC Call

Clint Mathis with University Mechanical Contractors, Inc.
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Participants

SERVICETRADE

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Transcript

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LAUREN

0:00 Hey...

CLINT

0:02 Hey, there?

LAUREN

0:04 I'm gonna mute for a sec since he's not here. You may just have to call him directly. I'm gonna run downstairs for two seconds. He'll be right back. Okay? Thanks.

LAUREN

0:45 Hey, Bob.

CLINT

0:45 Here you?

ROBERT

0:46 Doing...

CLINT

0:48 Doing good. Lauren, had to go run somewhere real quick. How are you doing? Not too bad. Just staying busy like always.

ROBERT

1:00 Ever short of just stuff to do?

CLINT

1:02 Yeah. Tell the truth, especially as it's getting into hot season. Yeah.

ROBERT

1:09 Yeah, that's always the challenge in the hvac business, right?

CLINT

1:15 Then you're trying to help people out and then you're like, I know you're so busy? I'm not trying to bug you or any of this stuff. So, because everybody's so busy right now.

ROBERT

1:25 Yeah, it's manpower is always the challenge.

CLINT

1:30 Absolutely.

CLINT

1:35 Give Lauren another second here.

LAUREN

1:38 I'm here.

CLINT

1:39 There she is. Hey Laura.

LAUREN

1:41 Sorry about that. The baby was kept dancing on my bladder.

CLINT

1:49 Good. Well, I'll go ahead and jump right into it. Thanks, for joining us, Bob. We just wanted to make sure we're clarifying some stuff before our demo on Thursday. Okay? As far as that demo, who, who's going to be on the call? Is it the same usual suspects that have been there before?

ROBERT

2:09 Yeah, it's going to be the same team. Okay? And I'm not sure. Did have you gotten acceptances from many folks or no?

CLINT

2:18 I have gotten some, I believe, I think I saw, let me see right here.

ROBERT

2:36 It's always a challenge when I forward your invites because I don't really know who, who's accepting. I mean, I can look at their schedules and see if people are booked or not at the time. But then.

CLINT

2:48 I have so many of these things. I've had so many meetings lately and I know I sent that one a while ago, but I do remember seeing some that were coming through.

Okay? I think... cob, did I wanna say clearance did too... but yeah, I'll be able to look.

LAUREN

3:08 Are we, are we expecting anyone who hasn't already seen service trade?

ROBERT

3:14 No.

CLINT

3:15 Okay.

LAUREN

3:16 Okay.

ROBERT

3:17 Well, with the exception of, I don't know if Brookes is gonna make it or not. And I don't know if it has been on every demo. So there might be like one of the it guys may pop in that wasn't on a previous demo or something like that, but I think for the most part, it's gonna be the same suspect.

CLINT

3:42 Yeah, because I know like, Peter was on one thing and then I think there was another person from it that was on there as well. Okay?

ROBERT

3:51 Yeah. And Peter, I mean, Chris is the manager of the group, Chris black, but Peter is a guy that would be helping us implement primarily. So.

--- Purchase decision ---

CLINT

4:00 Okay. All right, perfect. And that regards also has your guys as time frame or anything like that changed as well.

ROBERT

4:11 Well, we were hoping to make a decision last month and, I think it's been delayed and so the goal is to try and make it maybe by the end of this month, I mean, it's not like kind of a drop dead deadline. It's more of a goal that we had set out initially to have a decision made by mid year. Okay? But it more revolves around being able to go live on like a January one kind of a.

CLINT

4:45 Yeah. All right. Yeah. Just to be transparent on that. I believe if you were to say make this decision, I think we still have as far as our implementation date.

CLINT

4:56 I think we have one August fifteenth, but we've had quite a few people sign up recently that took the September first date. So if it is something that we can get moving, that August fifteenth date would help us be able to get to that January one date. But if it does, if that gets taken or pushed out, then we wouldn't be able to do start the implementation till that September fifteenth day. So I just wanna be upfront and transparent with you.

--- Implementation and ongoing support ends ---

ROBERT

5:27 Okay.

CLINT

5:28 So, so if Thursday goes well and you guys decide to make a decision, then let me work with Lauren and see how we can get that 815 date and get you guys going. But like I said, I just wanted to set the right expectations for you.

ROBERT

5:44 Okay.

CLINT

5:44 Okay. I know that we had a few questions as far as just on your sheet and then what we'll do is we'll get some clarification on that. Do you want me to do you have that pulled up, Lauren?

LAUREN

6:02 I do. I, we went through.

ROBERT

6:09 Hold one second. I gotta take this quick call.

CLINT

6:11 Yeah, go ahead by.

LAUREN

6:12 Yeah.

ROBERT

6:24 Okay. I'm back. Sorry about that.

CLINT

6:27 Did you want me to go through that sheet or you?

LAUREN

6:33 I can do it because I'll take some short hand it here. So, Bob, in preparation for Thursday, we met internally yesterday, we'd obviously reviewed, your questions and there weren't a ton of things on there that we were concerned about. But as we are preparing, for what you requested to see, we kinda lumped everything into like the three main three main sections of like what we're gonna show, we're gonna focus on tasking, we're gonna focus on the Northboundary service trade integration and we're gonna focus on dispatching so that's kind of how, the questions were organized. But there were some specific questions that I was hoping for some clarity on. We may not check list this call and like go down each question just from like, a low standpoint. So we're preparing a supporting document. So you've got like a repository of answers, and other information like reports and things like that you can view for all the things that you wanted to see.

--- Purchase decision ---

LAUREN

7:46 But we just wanted to get some clarification on things to just so, we make sure we were all on the same page. Does that sound good?

ROBERT

7:54 Yeah. I think, the biggest feedback that I've gotten and, it kinda relates to all of, the demos that we've seen really is that overall, the team is having a hard time envisioning.

--- Purchase decision ends ---

ROBERT

8:09 I mean, they're kinda seeing blank software and, you know, entering some basic information to see what it would look like and how you can get information in there. But I think the team is wanting to see like kind of like a live database to go in and go. Okay. Well, show me how, we run, the maintenances for the month and what the reports look like. And, you know, show us a completed contract that's got a lot of complex equipment in there and... it, the comments keep coming back that it just feels like these are sales presentations as opposed to somebody from the operations team that would be helping to implement... and.

LAUREN

8:54 They don't generally demo for us. They aren't demo.

ROBERT

9:00 Yeah. I hear you. I'm just, I'm relaying the feedback from the team. So I...

LAUREN

9:08 I don't...

ROBERT

9:09 Necessarily need that for myself. But... for whatever reason that's what the team is feeling like they need.

LAUREN

9:20 Does that stem from, do you think sort of, the sales process around vista and how they're having a hard time conceptualizing like how it'll be different from what they're doing currently?

ROBERT

9:39 Yeah. I think just being able to see like a data set in there that looks like something that we would have that allows them to understand how it works better.

LAUREN

9:54 Okay. All right. Well... we'll do what we can. We certainly understand the need for your team to see that but that we may have, we may have some limitations. And in that case, I think it just kinda is what it is without having your actual data in our demo account. We'll just... I think that, that's gonna be the harsh reality. We'll we'll attempt to show them what I feel like they think they need to see. But at the end of the day, you know, without like a fully functioning like sandbox account, we'll just have to show them what we have, and we, we're putting a lot of effort into showing some of these workflows.

--- Purchase decision ---

LAUREN

10:44 That sounds pretty important for them to see. So I just wanna, I just wanna make it clear, I can't pull anybody from our implementation team to kinda, show a lot of this like operations stuff.

ROBERT

11:00 Okay.

LAUREN

11:02 But we can do the best that we can with the resources that we have and we are pulling in some resources.

--- Purchase decision ends ---

LAUREN

11:07 I think you, you're familiar with Patrick who's your account manager for Northboundary, he, he's planning to attend my boss Tim, he may not be able to attend, but he will if he can. And we have some folks from our solutions architect team who are a bit more operations focused than Clint and I are.

--- Forms ---

LAUREN

11:27 So we're bringing in the right resources we believe to kinda show to kinda. So let me go through some of these questions. I was hoping for some clarity on. There was, there was a question in the first section about, is there a standard library of testing that can be easily modified for each instance?

--- Assets ---

LAUREN

11:53 I was wondering if you could provide a little bit more detail on maybe when things might need to be modified and what you meant by like each instance?

ROBERT

12:04 So, every site is gonna be a little bit different. So you might have the exact same piece of equipment at a site... two different sites. And let's say you got this 10 ton roof top package unit. And in one case, it's maybe serving a data room, and another case, it's just comfort cooling. And so at the one site, the customer may want like a chemical coil clean twice a year and filter changes 12 times a year.

--- Recurring maintenance ---

ROBERT

12:36 And, and at the other site, they just want kind of a standard comfort, you know, four maintenances, you know, two annuals, two operating, and a filter change and a belt change and just brushing the coils mechanically. So the task list is gonna have to reflect differences for those two sites.

--- ST app contracts and pricing ---

ROBERT

12:57 So right now, we have a standard task list in Northboundary, and then we modify it slightly for, you know, it's not like a huge modification but you're modifying four or five tasks, taking some off, adding some... for a particular site. And so we just wanna see how easy that is or is it even possible? And then if it is, how easily done is that? And, and, you know, how do we get the tasking?

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

LAUREN

13:29 Okay. From... from...

ROBERT

13:33 What we've sold into service trade into that?

LAUREN

13:46 Okay. Great. That's that's part of what we were that's what we thought. I think that clarification is good. So we can share that with. Okay. The next question was about how materials are tied to asset. There was a pretty broad question. I think we're clear on what the customization for reporting an asset that service four times a year, but only materials twice a year. We, we pretty much understand that I was hoping you could share a little bit more in depth of what you meant by what does updating materials entail... that mean?

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

ROBERT

14:32 So...

CLINT

14:32 That...

ROBERT

14:32 Question came from our contracts person. And so we get into a contract. Let's say we go out and do the first inspection and we find out that some of the filters are wrong and things need to be changed and maybe some tasking needs to change. And so how easy is it to make those changes to an existing contract? And then does it track what you had as the initial contract versus what you modified? Does it keep like a permanent record of each change that you've made to a contract?

LAUREN

15:10 Okay. I think that kinda ties with the amendment section too, like how are amendments entered?

ROBERT

15:20 Well, in some cases, it could be an actual amendment to a contract, but in some, you know, like after a first inspection, it may not even be an amendment.

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

ROBERT

15:29 It's just like while we just got the filter list wrong, we just blew it, right? We didn't have the accurate list upfront. And so we got to go in and make changes to it.

LAUREN

15:41 Okay. Yeah. This is, this is probably gonna be some of the stuff that's difficult to show... just from the standpoint of like, our demos are set up in such a way that, you know, it's...

LAUREN

16:03 I just don't I just don't think we're set up to show a lot of like reactive changes in our demo environment. I can check that, but I just want to make sure, just make sure

it'll be clear that we can probably talk through some of this but we may not be able to show it.

ROBERT

16:20 Okay.

LAUREN

16:22 So, but, we can certainly talk through it for sure and provide documentation in this document that we're preparing.

ROBERT

16:33 Okay.

LAUREN

16:33 Let's see here... updated agreement. All right. I'm just taking some notes. I got the amendment question answered from a reporting standpoint. I had a question about... material reporting per visit per agreement per month... and I was just curious, are your PMS?

--- Recurring maintenance ---

LAUREN

17:03 I think, I know the answer this. I just wanted to clarify. Are your PMS monthly or are they quarterly? Or can they be both?

ROBERT

17:12 They could be?

LAUREN

17:13 Just looking like, okay, just material reporting maybe per visit?

ROBERT

17:20 Yeah, I...

LAUREN

17:21 Understand what that means?

--- Pricing ---

ROBERT

17:22 Yeah.

LAUREN

17:24 Okay. And then for the labor reporting per tech per month for all active agreements, you mentioned? It was important to have the ability to drill in agreement per tech and ability to filter tech type. Is it generally the same text that's performing that work every time? Or is it... well, maybe now that I'm reading this out loud, I'm understanding the question differently, maybe you can, maybe you can share what you think that means to labor reporting, protect per month for all active agreements report.

--- Pricing ends ---

ROBERT

18:03 So, we have texts that are assigned to a contract to a maintenance account.

--- Tech time tracking ---

ROBERT

18:12 And some cases, we're going to have like a journeyman technician or maybe a lead technician, and then maybe a journeyman, and also an apprentice or maybe even two apprentices if it's a big contract. And we wanna be able to look to see who all is assigned. You know, what ours are assigned to each tech for the whole year.

--- Pricing ---

ROBERT

18:40 So, if you've got four different techs all assigned to that maintenance at various points in the year... you know, some of the inspections are big and maybe you've got more journeymen time. And so you've got a journeyman assigned for let's just say 40 hours in spring, 10 hours for an operational and then 40 again, and then 10.

--- Tech time tracking ---

ROBERT

19:09 And maybe the apprentices are assigned to, you know, you've got different hours. They're not all going out for the same amount of time, right? So, maybe the apprentice has 10 hours each time period. And so we want to be able to look on a calendar and go, okay.

--- Pricing ---

ROBERT

19:25 Well, this guy is committed for, you know, 496 hours for the year, and this guy is committed for, you know, 862 hours for the year.

LAUREN

19:39 So, it might not be like a specific person, but it might be a specific role of person. So like how many journeymen, how much time?

--- Tech time tracking ---

ROBERT

19:48 No, it would be, it would be a person.

LAUREN

19:51 It is, so it is the same person every time generally.

ROBERT

19:56 Generally, it's gonna be the same although, you know, maybe on the operational inspections, maybe it's just the apprentice that goes there. It's not the journeyman or, the lead.

LAUREN

20:11 Okay.

--- ST app contracts and pricing ---

LAUREN

20:11 Cool. All right. And then I just had a question about PSP visits and what that meant? I imagine it's preferred service plan, but I didn't wanna assume what's PSP mean?

ROBERT

20:26 It's some old terminology. What was the question?

LAUREN

20:33 What is PSP mean?

ROBERT

20:35 No, I mean, what's the question, that we were asking you?

--- Recurring maintenance ---

LAUREN

20:39 Upcoming PSP visits by month is active and expired.

ROBERT

20:46 Yeah. So just preventive service program. It's just terminology for a maintenance contract or service contract.

LAUREN

20:54 Okay. We had a debate on what we thought that meant and I'm glad it was right. Because what was it?

ROBERT

21:05 The entire industry is kinda standardized on certain terminology like a, you know, PM or PM a or PMC? And.

--- Recurring maintenance ends ---

LAUREN

21:15 Yeah, for.

ROBERT

21:16 Whatever reason, we chose terminology, totally unlike any other company in, the world. I don't know why.

LAUREN

21:25 I think it's fine. I think from a branding perspective, that man, why I get it. Let's.

ROBERT

21:35 No.

LAUREN

21:35 Yeah. Well, of them, okay. So I think I'm getting close to the end of my questions.

--- ST app contracts and pricing ---

LAUREN

21:43 Thank you so much for letting me pick the grain agreement, work orders when changes are made in the agreement, does it also adjust information in the open work order? That kind of ties with the question above about like I think updating materials, is that just like maybe the salesperson sold something, and now that we're out delivering the work, we realized we may need different materials or like to, you know, more tasks or something like that. Is that what you meant by that?

--- Recurring maintenance ---

ROBERT

22:18 No. So let's say, the schedule changes a little bit. Let's say the text go out there on the first visit and they want to shift the boiler maintenance or the heavy boiler maintenance, the annual to another month in the fall as opposed to summer or something like that.

--- Tech time tracking ---

ROBERT

22:35 And so, when we make the change in the contract, do the hours travel, then with the appropriate technicians... that are kind of assigned to that maintenance, like under the work order, like if the work order is now in fall, it's going to require more labor of journeymen, and maybe a little bit more premise to those labor hours, follow those text to that work order or do you have to that work order?

--- Tech time tracking ends ---

LAUREN

23:09 I think that might be a manual process, but I'll look into that.

ROBERT

23:14 Okay.

LAUREN

23:17 Okay. Most of this now, are you using Northboundary to accomplish this? And it's just kind of manual updates. Is that how it works today?

ROBERT

23:27 No. The contract stuff is all in vista.

LAUREN

23:31 Okay.

ROBERT

23:32 So, all we use Northboundary for is the initial setup. We'll download the asset list out of Northboundary, and then we'll upload that into vista. And then everything else happens in vista for contracts.

LAUREN

23:49 Okay. Edits after the fact.

ROBERT

23:52 Yeah.

LAUREN

23:54 Okay. To sold agreement. Okay. That is helpful and then do managing overhead. Clint and I thought we were on the same page, but again, we just, wanted to check with you because we may have been mis, remembering if this was a conversation we had with you or somebody else.

--- Tech time tracking ---

LAUREN

24:20 The question was how do we track overhead like unapplied time? What would be an example of unapplied time like training or something?

ROBERT

24:29 Training or let's say a technician is gonna change his Van. Maybe he's got a new Van coming in and he's got to have time to, maybe we gave him a allow a day of time to transfer his tools and everything into a new Van.

--- Tech time tracking ends ---

ROBERT

24:44 Maybe we ask them to help create a task list for something or a document of some kind. And so they've got to have somewhere to chart for time.

LAUREN

24:55 Okay. All right. I know how to answer that. Can we set goals for each service type and create alerts on goals are exceeded? We were just curious what type of goals?

ROBERT

25:07 No. So the goal would be this all relates to the same thing. So, on average, you want your hvac text to be about 94 percent billable. And our plumbing texts tend to run about 92 percent billable. So, what we wanna do is be able to set goals for each of the tests.

--- Tech time tracking ---

ROBERT

25:31 And then if they're billable time versus overhead time, it gets out of whack that it sends an alert. So we're not waiting until somebody runs a report at month end or something like that.

LAUREN

25:46 Okay. I don't think we can do that, but I think that's really interesting. And I learned something new today. I didn't know those sort of standards for the billable versus non billable time. So.

--- Tech time tracking ends ---

ROBERT

26:00 Yeah.

LAUREN

26:01 I'll pick the brain of our reporting guru and see, how he suggests can handle that.

ROBERT

26:07 Yeah. All contractors track it although I don't know that a lot of them are kinda setting goals and then alerts and that kind of thing. But at least if we can get it in a report that's, the main thing?

LAUREN

26:21 Okay. All right. Cool. And then the very last question, is there a module for managing licensing and certification with alert to let tech know they need to recertify. I'm assuming that means like for their like eu type, and then like other licensing, that they're required to have to do like either, their pro journeyman, whatever. Is that, is that what you mean by that?

ROBERT

26:51 Yeah. There's kind of a depending on the state that you operate in. Obviously, there's a lot of different requirements and we've got boiler licensing and electrical licenses and duration licenses and they all have dates attached to them.

LAUREN

27:08 Yeah. Okay. Are you doing that now in this?

ROBERT

27:13 No, we do it in a smart sheet. We just kinda manage it in a separate database.

LAUREN

27:19 Okay. Yeah. You may, you may just need to keep doing it that way because that's really more of a function of like an HR system. You can see like if they are due for their service trade certifications, but not so much like their personal certifications.

ROBERT

27:36 Yeah.

LAUREN

27:37 We can save, that type of information, but it's not gonna automatically say like pay your dues to be your electrical re, licensing or whatever.

ROBERT

27:47 Yeah. Okay.

LAUREN

27:48 Cool. We'll talk about that. All right. I'm out of questions. This is helpful. This is helpful. I know we're a little past time Clinton, do you have more questions for Bob

or Bob? Did you have more questions for us before Thursday?

ROBERT

28:11 I don't think I've got any more questions. One of the things that delayed us a little bit is... I told you we were down to kinda three finalists for this and so we made a switch of Simpro, they're no longer in contention and we actually replace them with BuildOps. Originally, I've looked at BuildOps and there were some things there that kind of eliminated them, but... they've since made some changes to the software that kind of put them back in to contention. So it's basically BuildOps and service tighten and you guys?

LAUREN

28:57 Okay.

ROBERT

28:58 That's that's the only thing we're looking at this point.

LAUREN

29:01 Okay. That's good context to know.

LAUREN

29:08 I don't really have any thoughts on that.

ROBERT

29:12 Yeah, I don't know that necessarily makes any difference to you. I just, I think Clint and I had talked about it a little while back and so I just thought I'd update you on kind of the process and where we're at.

CLINT

29:23 Perfect. The only thing the only last thing I'll add is this document that we're getting all set for you, Bob. I also got those, it questions that you sent a separate email to me and got those answered from Todd who we met with about the vista integration.

ROBERT

29:43 Okay.

CLINT

29:44 So, I'm gonna, we're gonna include that on that document as well? So I haven't forgot about that. I just wanted to put it all in one document. So it wasn't being scattered in multiple emails. So, yeah, that's good.

ROBERT

29:57 That's primarily just for the it guys, So yeah, it's not something we necessarily need to talk about in the meeting, but yeah, just having on the documents. Perfect.

CLINT

30:05 Perfect. All right. Wonderful.

ROBERT

30:07 I mean, they might have a question or something about it, but as long as they've got the document, the start for it should be good.

CLINT

30:14 Yeah, I'll make sure you have all that information.

ROBERT

30:17 Okay.

CLINT

30:19 Perfect. Anything else from me? Lauren?

LAUREN

30:23 From me? No.

CLINT

30:27 Perfect. Do you, do you have more meeting setup with service tighten and BuildOps or are you done with them? And then we're the last go around.

ROBERT

30:37 We've got one more with BuildOps. We don't have any more scheduled right now with service tighten... and only with BuildOps because they were kinda late into the game. So.

CLINT

30:56 Gotcha.

LAUREN

30:58 Are you open to sharing which one like you personally are gravitating towards?

ROBERT

31:07 You know, I think... me personally, I'm gravitating towards either service trade or BuildOps.

--- Type of work ---

ROBERT

31:18 I don't know that. I think service tighten is gonna get there. I just don't think they're quite there yet on the commercial side and.

LAUREN

31:27 Yeah.

ROBERT

31:28 I mean, they're putting enough money into it and they've kinda got the track record on, the re side that they're gonna get there, but I just don't think they're quite there in time for us yet.

LAUREN

31:41 I heard a rumor that BuildOps is gonna get into the residential side of things too, which I thought was interesting.

ROBERT

31:50 That would be.

LAUREN

31:50 They were like strictly commercial, but, I don't, I heard it from two different places which like unrelated, which like to me is like a little bit too weird of a coincidence but.

ROBERT

32:04 Yeah, that's kinda strange when their whole concept was really about to, they split off from service tighten because, they weren't doing the commercial stuff.

CLINT

32:15 Yeah.

LAUREN

32:16 Yeah. So I don't know if there's any truth to that, but, it just popped into my head since you brought up service tighten and residential, but I appreciate your taking some time to help us gain some clarity on some of these questions.

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

LAUREN

32:31 We'll be there Thursday with bells on. We've got some internal meetings today, to continue cropping to give the best possible experience. On Thursday. We are planning to showcase some of our new dispatching functionality which I think you guys will really like. It's some really nice use. So, so we're pretty excited to share that and some of the tasking stuff. And of course Northboundary, which you know, and

love, we'll talk a little bit more in depth about how that integration will work between it and service trade. So, cool. I don't have any other questions.

ROBERT

33:09 All right. Sounds good.

CLINT

33:12 Thanks a lot. Bob. We look forward to meeting you on Thursday.

--- Purchase decision ---

CLINT

33:16 And then what we'll do is we'll talk a little bit more about it and sorry to ask just in case you guys are wanting to make this decision this month. When is your meeting with BuildOps?

ROBERT

33:28 Let me look on the calendar.

--- Purchase decision ends ---

ROBERT

33:44 Thursday?

CLINT

33:46 Yeah. So, same day as ours.

ROBERT

33:48 Thursday afternoon. Yeah.

CLINT

33:50 Okay. All right. That way, we can do, get some stuff set up and if you need to talk to anybody or whatever that has experience with both, we have some people that are here that have had experience with BuildOps. So if you needed any reference calls and get their non biased opinion and you guys talk, I can set that up for you as well.

ROBERT

34:12 Okay. Sounds good.

CLINT

34:14 All right. Thank you so much. Look forward to speaking with you Thursday.

ROBERT

34:18 All right. Thanks guys.

CLINT

34:19 Bye.

LAUREN

34:20 Bye.

The End