ServiceTrade Demo with Dual Fuel Corp

Brett Griffith with Dual Fuel Corp
Recorded on 2/15/23 via Zoom, 2 hour s 22 min.

Participants

SERVICETRADE

Brett Griffith
Territory Manager

Kurt Dillmeier
Field Manager

DUAL FUEL CORP

Simon Farhi
Chief Financial Officer

Steven Schwarzbaum
President

OTHER

Joseph Bohm

Topics

Transcript

KURT

0:00 No worries.

BRETT

0:01 Good. How are you doing? Man? Good. All right. This one should be fun. I don't know if you saw the email that they sent over?

KURT

0:12 Yeah, yeah.

BRETT

0:15 It's kinda my plan. I'm gonna go through those three workflows and let's make sure it's a good fit. And if it is, we can talk about, you know, intact and all that good stuff with coordinate.

BRETT

0:35 What are you driving up to Boston tomorrow? Are you fine? It... so much easier?

KURT

0:41 I still feel like it's square Peg, round hole, but far from me, it's a huge improvement over ServiceFusion. C data has got them kinda handcuffed. They're moving forward with pro core.

BRETT

1:01 Did we ever hear back about from pro core about like integrating service trade to pro core?

KURT

1:08 I reached out to... Pat Flanagan who's it pro.

BRETT

1:15 Yeah, that's fine.

KURT

1:17 In small team over it. So you have a...

BRETT

1:20 You said what?

                              KURT

1:22 It's a small team?

                              BRETT

1:24 Yeah.

                              KURT

1:34 They're kicking off on the 20 first to go forward with pro core. Haven't heard back from data at all, have on their social pages about not sure how things are moving for them.

                              BRETT

1:48 Got to imagine they're not building new stuff despite what we've been told. They're an old system.

                              KURT

1:57 Just holding on for gray.

                              BRETT

2:00 Yeah. John apec connected with me on LinkedIn and he's been asking me questions left and right? So he's very engaged.

                              KURT

2:11 John.

                              BRETT

2:13 Yeah.

                              KURT

2:15 It's fine. We had a question and he's like, can you are, again, I'm I know that you, the first time back was on site with Chris. I was mentally 20 percent there... but, you know... he's in the sandbox is typically we don't like doing this, but he seems to be somewhat competent and I was able to share with him with Chris shared with me, which was an external ID, how they would connect the two. So I think that page is very resourceful right? Where.

                              BRETT

2:54 I agree.

                              KURT

2:55 So, I send him that link. So if he's having a doing something, you know, rather than giving a Ninja to a 10 year old, maybe he's 20, he can do, you know, you can get about 20 Miles before he hit a brick wall.

BRETT

3:10 Yeah. Now, I think he's one of the only people I would put in a sandbox too, but we can talk about that later. I got Simon here.

BRETT

3:28 Hey, good afternoon, Simon. How are you?

SIMON

3:30 Good. How are you doing?

BRETT

3:32 Good. Thanks for asking. Are Steve and Joe joining separate or are they with you?

SIMON

3:39 Steve will be joining in a second. He just left my office. He's going over his office. Joe won't be joining... but let's go ahead with Steve. Okay, you just real quick... second, guys. Just give me a minute and I'll be.

BRETT

3:58 Cool.

BRETT

4:49 Right.

SIMON

4:55 Sorry, we just had a little situation but he'll it's coming on in a minute.

BRETT

5:01 All good. How's life been? You've been busy?

SIMON

5:05 You know, how it is, but look, you know, what we wanna do today. So I've obviously had a chance to, you know, see a little bit of ServiceTrade a couple of weeks ago.

--- Accounting integrations ---

SIMON

5:16 You know, we're working on the impact integration... for our service platform. We are, you know, looking at your option, you know, to be perfectly honest, we're looking at BuildOps as well and doing demos with them. And, you know, I wanted to kind of expand the circle internally. Who's you know, looking at service trade, you know, Steve is our president, the service department, you know, reports to him.

--- Accounting integrations ends ---

SIMON

5:44 You know, he's very involved in all of this and, you know, I wanna get him to, you know, see it and, you know, get his observations. He also designed those workflows that I sent which I think, you know, can, you know, be a good jumping off point in terms of how, what we're doing today, you know, can run through service trade.

--- Type of work ---

SIMON

6:08 Now, there's an even wider, you know, the other people in our service department again like the service department is under Steve, but, you know, Steve, not, you know, in a day to day, we would want people from that service department to, you know, demo service trade as well.

--- Type of work ends ---

SIMON

6:27 But, you know, we're kind of doing this in phases as we go along. If we have too many people too early, then it just becomes a mess. So that's sort of how we're proceeding. So let me stop there, Steve, see if you have anything you want to get off with and otherwise let's go into the software.

STEVEN

6:46 No, I think.

STEVEN

6:53 Okay. So like for us, you know, we want to grow a lot... you know, we wanna talk about individual service call, you know, workflow management, like what is a normal service call look like? Obviously, how does that convert into proposals and things like that? And then all the back end tracking of that? How many proposals we now, what's our close rate? How long have things been open for, you know, when service calls come in, we want to be able to see what time was it entered into the system? We want to have an internal response time. If we don't get there in a certain time, does it change from green to red?

--- Recurring maintenance ---

STEVEN

_{7:32} So our dispatcher knows, you know, so that's kind of like the day to day workflow management right? Then we have the year to year, which is we have our service contracts or service contracts, have a list of things that need to be done, a boiler, cleaning, a burner, overall, and inspection, a filing, you know. So how do those things get tracked? How do those reminders get generated, et cetera. Invoicing? Obviously, you know, how do we quickly go from a service ticket to an invoice? How do we Bill out recurring tasks, right? So like service contracts, we don't get necessarily a new service contract every year.

--- Recurring maintenance ends ---

STEVEN

_{8:12} Once we have it, it's on auto renew. So how does that get invoice... cross? You know, API with Sage, right? Like we have a big problem with data integrity. So, you know, Quickbooks might say this is the property manager and help us might say that's the property manager, different phone numbers, different emails, proposals sometimes go to the complete, wrong company. Invoices go to the wrong company... that's you know, important then also the mobile interface for technicians, right? We wanna make it easier for them to do the right job on site. So we'd like to see kinda how you guys set that up, make sure their notes are getting in and make sure they're actually completing their call setting up like the right kind of process for that... notes are always difficult for them, right? Some are, you know, they have a really good text voice to text translations... that's kind of a data dump on here.

BRETT

_{9:23} Okay. Yeah. I'm trying to take notes on everything. Welcome, Steve, by the way. What I was thinking. So Simon sent over your three workflows, the service request workflow, the service proposal workflow, and then sign service proposal workflow.

--- Purchase decision ---

BRETT

_{9:38} I was planning to go through all three of those and I'm pretty much gonna touch on basically everything that you mentioned... with what you were just talking about there. Does that sound good?

STEVEN

_{9:48} Yeah.

BRETT

_{9:49} Cool. Just a couple of questions for you guys before we get started here, is it just service trade and BuildOps that you're looking at?

--- Parts management (inventory) ---

STEVEN

_{9:56} As of right now, yes.

BRETT

9:59 And then in one of the workflows, I was reading through it's like dispatcher sources part your dispatcher gets part. Do you guys want your po process and inventory management process to be done in the service software or in intact?

STEVEN

10:14 Hold on. You said the CO?

SIMON

10:16 P.

BRETT

10:18 OS.

STEVEN

10:19 Po, so... most likely it will be in intact, but for installations, it's definitely going to be an impact because you guys don't have an Installation mode for service. Ideally, it could be in, you know, service trade and port over directly into intact for inventory again, right?

--- Accounting integrations ---

STEVEN

10:49 Like for service, it would probably be done in service trade for installs. It would probably be done in Sage and then does it port over?

BRETT

11:00 Okay. So to answer that question, does it port over? Yes, we're looking at core service trade today. We have another product it's called partsledger.

--- Parts management (inventory) ---

BRETT

11:09 It's our po and inventory management solution. I think the best way to look at this would be let's go through service trade and make sure that's a good fit. If it is a good fit, we can talk about partsledger and the inventory and the po side of things. Does that work for you guys?

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

STEVEN

11:23 Yeah.

BRETT

11:25 Cool. And then another question is, are you guys planning to invoice out of whatever service software you select or is that going to be out of intact?

STEVEN

11:34 Out of the service software, right? Simon?

SIMON

11:39 Yeah.

BRETT

11:41 Gotcha. And then one other question you said you wanna grow, how do you want to grow? Where do you guys want to be?

--- Purchase decision ---

KURT

11:47 So, morning, her.

STEVEN

11:49 We... we want to increase our close rate.

STEVEN

12:01 The three areas.

BRETT

12:04 Okay. I got you. Any questions from your end?

KURT

12:13 All good.

BRETT

12:15 So, guys, I'm gonna, Steve, since you're new to service trade, I'm gonna start out with a little bit of an overview just so you know, what you're looking at and then we'll get into those workflows but guys, if you guys have questions throughout the meeting, feel free to interrupt at any time.

--- Purchase decision ends ---

STEVEN

12:25 Yeah. Just real quick. Could you just give me like a one minute intro on you and on Kurt? What you guys do, just so have a good lay of the land.

BRETT

12:36 Yeah, absolutely. It's our bad. So I'm Brett Griffith. I'm the inside territory manager here at service strait for the northeast, been at service trade for about four years now, and I've been working with mechanical boiler companies for about two of those four years, the most recent two years. And do you want an overview on service trade as well?

STEVEN

12:59 Sure. Yeah.

BRETT

13:01 So we're a service management solution strictly for commercial and industrial contractors. We don't work with residential and we only work with skilled contractors. So no pest control companies, pool cleaners, anything like that. It is strictly your guys business and your guys workflows been around for about 10 years, got about 1,100 customers in the states and in Canada. As of today, I think you'll see today a lot of the differences in a commercial built software versus what you're using today with M help. And that's really my goal to point it out that there is software specifically made for you guys... hurt.

KURT

13:35 Yeah, and I'm the outside territory manager for the northeast, same territory as Brett... just going back.

--- Type of work ---

KURT

13:44 Actually, I reach out to Simon at the time. Maybe the then service manager. We're going to do a demo and the internet wasn't working well at your offices. Long story short. Got a hold of Simon. We work very closely with a coordinate and ourselves kind a target similar commercial service contractors, a little bit more heavy on the Construction.

--- Accounting integrations ---

KURT

14:09 Obviously, we're on the server side, but we work very well together intact. And service trade is native, which is nice. There's no additional cost. Bob sandals has been working with the company for a long time now. So I commend you actually on going forward with the accounting first.

--- Accounting integrations ends ---

KURT

14:32 A lot of times when we speak to companies such as yours, they're trying to digest both at the same time. I'll give you an example, total fire protection. It's 75 tech deal that I sold last year. They tried to consume both at the same time and... it was challenging, you know, it's a lot on everybody's plate. We always kind of rather have that staggered personally. We rather go first as far as getting out in front of the

customers. What's most important to us? And, you know, just to fill in a little bit more on what Brett said, we were built by a guy who was a national sales manager for red hat. So he has a software background. Red hat was eventually consumed by IBM. So we're fortunate to have that background. But when he left red hat, he went to Don right hood, which is commercial service contractor on the fire side. Why is that important? It's important because for the last 10 years, he's married the two in terms of what is most important when we talk about boilers, hvac and fire life safety. It's very, the recurring service. How do we focus on our customer, not only how we grow revenue? But how do we make it most simple to create more revenue? More pull through work for you guys. And that marriage of the two I think is really what's unique about service trade. And we bought a software company Northboundary, which begs one question. How many sales people do you guys have?

KURT

16:06 Okay. Northboundary is kind of the front end funnel for some of our, you know, people that wanna grow typically have salespeople out, right? It's pretty much low cost to hire a salesperson, give them a minimal salary and say, you know, whatever you bring to the table, we'll pay a commission on. Northboundary is kind of the front end which they're pitching the products. The idea is the services, all this stuff that you do well once that's populated, it seamlessly syncs in the service trade. So, for our larger clients... you know, on core, you know, they were now 50 50 split between ownership and private equity.

--- *Pricing* ---

KURT

16:48 I say that because they're probably growing at about 30 percent a year, they've got close to 500 techs. They're adding about 75 tech. They're you know, a good social proof for us, you know, and I will bring it up, build out.

STEVEN

17:03 Who, who's doing the same?

--- *Pricing ends* ---

KURT

17:08 So, Northboundary, right? We Northboundary is the front end of ours. We don't you know, service trade is a great solution for you. But when you have sales people and you want to grow that business, that's kind of our front end we were thinking about, okay?

STEVEN

17:24 I sound like a CRM.

KURT

17:26 It is a light CRM, yes.

STEVEN

17:28 Okay. Not like lead gen come.

KURT

17:32 No, as a matter of fact, you know, we closed on a deal in December and I was looking closer at it. Almost looks like he stole everything from Salesforce. It mirrored very similar. You guys spent 30 years working at Siemens and he's an engineer by trade and, you know, so, right? You can build all that information as a salesperson out in the field, right? You wouldn't want that to go to waste or now take paper and start writing into service trade or copying and cut and pasting, right? This is your whole point. You know, about apis, right? Billy Marshall, our cofounder, you know, built this company not only in the cloud but on API. If you do a Google search, open API for service trade, you'll see a laundry list of what we do. When you look at competitor of ours or competitors of ours, you'd wanna do that type of Google search because when they don't have their open API, publish on the internet, that means they're kind of, you know, got their cards close to their chest.

STEVEN

18:32 Got it. Yeah. So I think we might, you know, we might at some point want a senior boundary. You know, we don't have like prototypical sales people, but we have leads coming in. We have estimated project pricing. We have proposals that are going out. It's not prototypical like salesperson, but we're doing a lot of the same tasks.

KURT

18:52 Yeah. Understood. And Northboundary is like 3,500 bucks a year. It's the.

STEVEN

18:58 Right now, is service, treat a privately held company or are you guys public?

KURT

19:04 We, we were pretty much privately held. We had one private equity company local in Raleigh Durham invest. And then subsequently, JM I JM I was an early investor in service. Now, they're a private equity group run out of Baltimore that only invest in software, right? So that's their only focus. And within about 60 days, they invested in service rate, which I think is a testament to how well the system is built. So now we're currently 40 percent of the private equity group in Raleigh Durham, 40 percent by JM I and 20 percent by employees.

--- Pricing ---

STEVEN

19:45 Got it. Okay. And what's your guys long term?

KURT

19:50 Well, like any private equity group, right? They want to invest in it, they want to build it, they want to improve it. They wanna add features. They wanna grow it. We

grew 50 percent last year and we're expected to grow 40 percent this year. Okay. What's that?

STEVEN

20:11 Employees are?

KURT

20:11 There, when I started two years ago or just have two years ago, we were about 75 80. We're up to about 220... but I think what's most important and only, you know, I'm not about trying to down sell versus our competition, but we highly respect build outs, right?

--- Pricing ends ---

KURT

20:30 Those guys made a lot of money over at service tighten. But from what we hear, they're having somewhat of a difficulty getting guys to market, right? So once they sign contracts, we're hearing a lot of people stumbling blocks, getting them up and running with the software. Again. I don't like to down sell versus our competition. You know, I think it's just fair to share that with you. I'm sure the product is great and competes very well with us, but it's just something that we hear in the current schedule button. They're trying to raise more money. I think they burned through a ton of cash last year. Listen, they grew from five to 10,000,000 last year that's impressive. That's very impressive. But with that, do you have the support people, you know, to know expertise to onboard those people? We have a team of 50 people who are focused solely on doing that. So.

STEVEN

21:25 So, all right. Sounds good. So let's jump in.

BRETT

21:29 All right.

BRETT

21:35 All right. So, I'm just gonna start off with a little overview for you. Steve two pages I want to show you. Then we'll get right into your work post. One of the first pages I want to show you is the service dashboard really just giving you all visibility into your day from the office so you can see your daily schedule with the different jobs. Your text are going to whatever respective location as your text are completing those jobs, dispatchers in the office are gonna see that with these check marks... a couple of other things.

STEVEN

22:01 You scroll back up real quick. So the top, what, what's that zero one zero one, two of two?

BRETT

22:09 So, two of two that was there's two services on this work order. We did two different things and the technician completed two of two.

STEVEN

22:16 Okay. So I imagine this isn't where you're this isn't your dispatch board, right?

BRETT

22:23 No.

STEVEN

22:24 This is just where...

BRETT

22:27 This is.

STEVEN

22:27 When...

BRETT

22:28 You see when you log in?

STEVEN

22:29 So you have your time on the left, then you have your job number and job name... and then, okay, you have your job number, you have your technician, who assigned to, and then you have essentially what would be like your building address?

BRETT

22:44 Correct.

STEVEN

22:45 Okay.

BRETT

22:48 And you guys can filter this out. If there's different people in your office that need to see different things, maybe different divisions. You guys can break it up into as many different divisions. You can call them whatever you wanna call them right here. And then that way whoever is looking at it just has to click. Hey, I just wanna look at boilers or burners or whatever. But this page is also giving you guys visibility into all of your work that you have to get done. So if you guys do have something that's overdue or letting you guys know front and send that, hey, you need to schedule this, you can deliver the work to your customers, keep them happy.

--- *Recurring maintenance* ---

STEVEN

23:19 So...

KURT

23:20 Not power.

STEVEN

23:21 Are you like... here, you have a due by date, right? So this is going to be more so for the ongoing maintenance, right? This isn't going to be service calls. Do you?

KURT

23:39 Have anything?

STEVEN

23:40 That comes up on this page in terms of service calls, right?

--- Recurring maintenance ends ---

STEVEN

23:43 A customer calls in eight a. M call goes in. You know, we want to have a three hour response to. So at 11 a. M, if a technician hasn't changed the status to onsite, does anything happen? Is that able to show up on this front page or no?

BRETT

24:00 This front page, no, but on our dispatch board which I imagine your dispatchers will be looking at pretty much all day long. That... also another thing with your service calls, you don't have to put a due date in, but you can, when you're actually setting the job up, say, hey, get it done by the end of February or if it's emerged to get it done by the end of the day?

STEVEN

24:21 So also, sorry, let me just go back one step as you're walking us through this. If you could tell us kind of like who you envision interacting with each of the pages that would be helpful so that I don't ask questions like about a dispatcher, if you're like, no, no, we have a whole nother page that the dispatcher is gonna be, you know, so if you could kind of maybe give some color to that.

BRETT

24:46 Yeah, absolutely. So this page right here is probably your service manager, maybe an office manager, someone who's running this show from the office. They just need to keep a look on everything that's going on for today. A couple of other things on this page, this next bucket jobs that appointments doing the next two weeks, the end of the day, these jobs are going to be overdue at some point.

--- Tech On-site ---

BRETT

25:06 So we're just letting you know ahead of time so you can schedule them out. This one right here is really important. So, essentially how it works is text go out in the field. They complete their work order, take their pictures, do their or find their deficiencies, whatever they need to do once they clock out and they say, hey, I'm done with this work. That work order is coming back to the office, allowing someone from your office, maybe that service manager to come in review it. Let's make sure it's got the correct parts, labor, job items, all that good stuff. All my pricing is correct from there. Once the office make sure it's good, they market complete it then falls down into our completed jobs to be invoiced.

--- Tech On-site ends ---

BRETT

25:43 These are the jobs that we just need to build out a service trade. And then we're gonna push it to impact as well for reporting.

BRETT

25:54 The last thing on this page is tech locations. I wanna point out it's not real time truck tracking. So I can not see my truck as it's driving up.

--- Tech On-site ---

BRETT

26:01 I 95, but I can see my truck when they make a clock event. Those clock events can be on site and route or job prep. It's gonna essentially drop a pin where that technician is located on a.

SIMON

26:13 You...

STEVEN

26:14 We use.

SIMON

26:14 Links up. Again, we use links up in our vehicles. It's a camera system and GPS. You're talking about apis before... would we be able to integrate that in here?

--- Tech On-site ends ---

BRETT

26:36 Open is.

SIMON

26:40 I'd have to check they haven't expired before.

BRETT

26:44 Yeah, we can check on that for you as well. Can you spell that?

SIMON

26:48 Linx up, but it doesn't matter because like, you know, it's pretty generic. What they do. It's like, you know, two, a cameras and GPS. We could, you know, if there's another company that does the same thing that can connect with you to you through API, you know, that's really what I'm I wanna know.

--- *Accounting integrations* ---

BRETT

27:07 Gotcha. We do have a partner that would be using the fleet tracking side of things. They're called a uga. They're bridgtone company, essentially, their cameras and their fleet tracking flows right into service trade in this current tech location screen. So you can't see real time.

STEVEN

27:21 You said it.

BRETT

27:23 A, a ZUG.

STEVEN

27:26 Okay.

BRETT

27:27 I can connect you guys with the director of partnerships over there, and he can kinda show you the platform if you're interested.

STEVEN

27:33 So, just real quick, I imagine you're going to get into, you know, that you have different statuses called dispatch technicians, traveling or blah, blah, blah, right?

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

STEVEN

27:43 If you are this up with uga. Do you have the ability to send out alerts to customers? Like, hey, your, you know, technician, accept the call. He's on way. And, you know, we have GPS through a uga. So your tech should be there in 45?

BRETT

28:02 Yes. So actually the notification is going to come through service trade. And when we go to the field, I will show you that from the technicians point of view.

STEVEN

28:09 Okay. Cool.

BRETT

28:14 Any other questions on this service dashboard before I show you one other thing?

STEVEN

28:22 Is there anything on this page about like proposals?

BRETT

28:27 This page? No, what are you looking for?

STEVEN

28:30 Just like, you know, proposals that went out statuses, what's not?

BRETT

28:35 So, I...

STEVEN

28:37 I don't want you to go out of?

BRETT

28:43 Yeah. So on this page, no, that said... all these things at the top, all these things can be reported on. So I would just go run a quote report, show me all the quotes that haven't been approved or all the quotes that have been approved, but don't have a job attached to them, whatever it is.

--- Recurring maintenance ---

BRETT

29:01 Okay. So from here, I'm gonna take you to a location page because service trade is built for commercial industrial contractors. How we're basically set up is off your ship to and you're Bill to your Bill to being your property manager, ship to being where your deliverance service. So in this case, here's my Bill too. And then Arthur ash is my ship too. Under Arthur ash, I have services is what I'm actually delivering to the customer. So whether it's repairing an efficiency like so, or it is my recurring work like this is a recurring boiler inspection. This is going to be your guide verbiage inside of your service trade account. So whether you just wanted to say semi annual inspection or you wanted to say hold on your list of what they're actually doing on site that's up to you guys for recurring services are going to set these up on a recurring basis that you actually go out. So I set it up semi annual. I can make it quarterly. I can make it annual. I can really make it anything I want and that's done

right down here. And then with that, you can attach items to it. So if I go out semi annually and I use the same items each time that the items in the service, that way when I generate the work order, everything is there for me.

--- *Assets* ---

BRETT

30:12 Under services, you got assets in service trade are just your customers, pieces of equipment that you guys are working on. So you can get really granular with the type of information you keep on these. You don't have to get really granular. It's up to you what you track. The reason we track it is to provide you guys with really Rich service history for these pieces of equipment, not just showing you guys in the office but showing your technician what was done in the past but also showing your customer everything you've done to their equipment.

STEVEN

30:40 Is this modifiable...

BRETT

30:44 In what way?

STEVEN

30:45 Like under the boiler? If we wanted to add like installing contractor?

BRETT

30:56 So we can attach like or we can let me go to one that boiler. If I open one of these up, I can add any kind of attachment I want and that's going to be here under attachments. Is that what you mean?

STEVEN

31:12 So right now, we're growing, right? So we have for example, a new service or director of service starting next week. Okay, we have a lot of history, right? So like two weeks ago, we went out to a building. We did the boiler replacement there, maybe 14 months ago, we ended up sending them a proposal for refractory, and we basically were like the refractory was installed incorrectly here's. A proposal to replace. We have a lot of new people then they write back that's very concerning since you install the refractory, what else is on? So if, you know, right now we don't have a great way to say like, hey, guys like this is an account that we also did the Installation.

BRETT

32:00 Gotcha. So if we're looking at the piece of equipment like this, all that history is going to be in here. You're gonna see every service you provided. So that install is gonna be here. And when I click on jobs are just work order so I can see the initial Installation, and then any services we've provided in the past, and then everything's going to be hyperlinked here. So you can click into those to further see exactly what was done.

STEVEN

32:26 So you'd have to basically go back to like your first job and see that it was like a start up on a boiler and like read through the notes, but there's no easy way to like tech. The account that's like this was a Dual Fuel Installation.

BRETT

32:42 I don't believe so. Kurt, do you know the answer that question?

KURT

32:49 Sorry, I'm just getting off a mute. So how would you tag it as being a Dual Fuel Installation? You could always add tags to the location page... and then do all searches for, you know, those assets which were Dual Fuel installed versus not.

STEVEN

33:15 Yeah. Like that's fine. So now you could go to Arthur stating and see you.

KURT

33:20 Yeah, or you could search the tags just looking at, do fuels and see, you know, a laundry list of everything that you've done?

STEVEN

33:26 Basically, I just want to be able to prevent like technician goes out, right? Just like they do to any building, they report what they found, which is great.

--- Deficiencies ---

STEVEN

33:35 But if they found something defective with the Dual feel Installation, I don't want to go back to the customer and say, hey, this is messed up. I want to go back to the customer and say, hey, you know, we found something that we don't like exactly how it's looking after eight months. We did the Installation, where take care of it. You guys don't need to worry about it then, hey, whoever installed this messed it up. So if we can have that line of like information just right there, it seems like this tag is pretty simple.

BRETT

34:05 Yeah, I would agree that's probably the best way to do it. And then also when you guys do go on site and find that issue, you can log it as a deficiency in here. So you can say, hey, it was a Dual full install and we got this, whatever's broken. So you're gonna match them up?

BRETT

34:23 Couple of other things on this location page.

--- Deficiencies ends ---

BRETT

34:27 So you will have a list of every deficiency found, every quote provided. The one thing I want to point out with contracts I saw in the email that Simon sent over, you guys already have your markups in there. Perfect. That's what we're going to put into service trade. So, you guys don't have to deal with any markups outside of the system. Does that make sense?

--- ST app contracts and pricing ---

STEVEN

34:47 What does that have to do with contracts?

BRETT

34:51 So contracts and service trade are pricing contracts. So you guys pay something unit cost, you charge your customer, something that's your unit price. These are your different mark up rules for customers and you can have different contracts or as many contracts as you want for one customer. Maybe it's a bronze silver gold contract. And then you can apply those contracts based on the type of work you guys are providing to that or?

KURT

35:14 Or alternatively, it could be right? Just as you mentioned the Dual fuel install that was screwed up by the prior people doing it and it's a zero percent markup because you're providing that work for free of charge because prior people screwed it up. Okay?

--- Recurring maintenance ---

BRETT

35:38 Any questions on this page before I get into the sr workflow?

STEVEN

35:43 Okay. So we have the location, which is our ship to then we have the location contact, how many contacts? Okay? So you can put in multiple contacts, right? Correct? Okay. So you put a name, I assume you can put in phone numbers?

BRETT

36:01 Yeah.

STEVEN

36:02 Okay. Okay. Great. So back out of this... then you have the company which essentially would be like the parent account. So for us, we go like management company and addresses, okay. In the regions, I don't think we would use. Now, sometimes we have buildings where it's like, you know, there's no super onsite.

--- Assets ---

STEVEN

36:28 So use the lockbox includes one, two four nine or there's only a super outside until five PM after five PM call. This guy, is there a way to set this up? So that on every single job underneath, it just automatically goes, so that's in the comments?

BRETT

36:46 Yeah. So I would leave a comment like this every time I go to this location at Arthur ash, I see this comment in both the field and the office.

--- Type of work ---

STEVEN

36:53 And right. So on the mobile, that comment would be right there. Okay? So now you have the services, what are the services?

BRETT

37:03 Services, what you're delivering to the customer? So whether it's the installed, the start up, the deficiency repair, or the recurring service?

STEVEN

37:10 Install? Like do you have, like, are you talking about like project management software or this is just service?

BRETT

37:17 We have slight project management capabilities. We're more focused on like small projects, less than six months, owner, projects, not dealing with PC'S what are your guys installs look like?

STEVEN

37:31 Okay. So then let's just take out projects, right? So for us, you know, we have a lot of service calls. Would a service call go under services or that would go under jobs?

--- Recurring maintenance ---

BRETT

37:44 So the service is what's being delivered, the job is the individual work with the appointment that we're going out on February fifteenth?

STEVEN

37:54 So, could you give me an example like, or let me give you an example of a typical service call comes in no heat. Okay? So now we set it up, right? Yeah, I guess request work, right? That'll come?

BRETT

38:11 Yeah, that's kind of what I'm thinking as well. So, let me just take you over to our dispatch board and I'm just gonna follow down your workflow and do it in service trade. So customer emails or calls into place in sr, you guys need to know, is it existing or not? How you're gonna do that is add a job. Well, if I, if BG home, which I know isn't something in service trade, it tells me there's nothing showing up. So I would add a new location in this case, as well as the Bill to information. But if I put in something like Arthur ash, which I know is a location in here.

--- Recurring maintenance ends ---

BRETT

38:47 All the contact information is there there for me? So your CSR doesn't have to fill anything out. It's already there.

BRETT

38:56 Let's see. So, is this sr an emergency service call requiring immediate assistance? You guys figure that out when you're on the phone. If it's emergency market as an emergency, if not just market as a service call or whatever job type it is.

--- Assets ---

BRETT

39:11 And if it's not, I would simply... just add an asset. I can default to the building. If you guys don't know which asset this is occurring on your technician can figure it out. And I would say, hey, this is the boiler job. From there, I would save that.

STEVEN

39:26 One service.

BRETT

39:28 Line service line is the type of work you guys are performing.

STEVEN

39:34 Service work perform.

BRETT

39:39 So, that would be boiler burner, hvac, refrigeration, stuff like that.

STEVEN

39:45 Okay. Yeah.

BRETT

39:47 It allows you to map back in the...

STEVEN

39:50 Okay.

BRETT

39:50 For different service lines... so if you, if this is not an emergency, I would save it in where that job goes.

--- Assets ends ---

BRETT

40:01 Is it's not going on the schedule? However it's going up here to available jobs where you guys can schedule it whenever it makes sense. Does that make sense to you?

STEVEN

40:10 Which is Arthur ash under service part, right?

BRETT

40:13 Correct. So if I drag and drop that down to whoever Alex, I click on it, there's my, no heat and there's my fix it that I just put.

--- Assets ---

STEVEN

40:22 Okay. And then all those comments or just previous comments that come up?

BRETT

40:30 That's correct. And you can tell when they were put in like some of these are back 2020 2019.

KURT

40:37 Okay.

BRETT

40:41 In the instance that Arthur ash calls you and it is an emergency, well, mark it as an emergency service call, they have no heat, I tell, or you said you have a three hour delivery time, right?

--- Assets ends ---

STEVEN

40:53 Yeah.

BRETT

40:54 So, it is four 30, hey, mr customer, I can have someone to you by six 30... just gonna say fix it.

KURT

41:02 Okay. I'm just.

BRETT

41:06 Did you guys say so? I'm sorry?

KURT

41:10 That's so cool. Even.

BRETT

41:14 Okay. So from here, you guys put in all your information. Would you apply a technician at this point? Do you know which technician is going out? If it is an emergency?

STEVEN

41:23 Probably.

BRETT

41:24 Not probably not. Okay. So, everything's in here simply gonna save it. What happens with that job? Is it falls down here in my unassigned bucket. It's this one right here, so I can click on it. I can find more information about it there's. My note heat there's, my fix it. And then when your dispatcher figures out which technician they're sending it's a matter of dragging and dropping it. So I'm gonna drag and drop it down to myself.

STEVEN

41:48 What I think in bobble line is?

BRETT

41:50 Yeah. So, when I hit this little buck, excuse me when I click on a sign it disappears.

STEVEN

41:57 Okay.

BRETT

41:58 Essentially just your Q of jobs that you guys need to schedule for the day that our emergencies.

STEVEN

42:03 Right.

BRETT

42:04 And so dispatcher assigned to technician, accept the call, let's go out to the field. Unless you guys have questions here.

STEVEN

42:12 So, if you set a time for it, it's gonna go into the on assign. If you don't set a time for it, it's gonna go into the service calls up, correct? Okay.

--- Recurring maintenance ---

SIMON

42:23 On one of the previous pages... where we kind of had the overview you had, you know, there are jobs and then there are services right now. So a service call would be considered a job.

BRETT

42:43 That is correct. The job in service trade?

SIMON

42:45 Over quarter. Okay. So, services are like something free that comes through a contract or if we have to, if we have a contract with a customer and we have to provide preventative maintenance. So that would just be a service.

BRETT

43:00 Correct. But when I just went through that process of creating the service call, it makes that service call the job the same thing as the.

SIMON

43:08 So, it's a service call can be for a service or for a job you're saying?

BRETT

43:15 Right, correct.

SIMON

43:18 Okay.

BRETT

43:21 The service call is just what's being performed. The job is when it's being performed, who it's being performed by and what they did. So.

SIMON

43:27 Right. So right now, you know, in our accounting system, we have a job that's called service calls, right? And that's sort of like our catch all for all the emergency work, right? Where we can't plan it, you know, there's no co, you know, there's no contract necessarily. How would that work here? There would be a job there's just like emergency calls that's kind of always open. And then when people come, we just add, you know, more and more, you know, items to that.

BRETT

44:04 So you would probably create another every time an emergency call comes in, you would create another work quarter, correct?

SIMON

44:14 I mean, I'm asking how it works in the system. I mean right now or, you know, in M helpdesk, yes, but in our accounting system, it's not... yeah, I mean effectively, yes.

BRETT

44:30 That's exactly what you would do here. And then you just select the type of call that it.

--- Recurring maintenance ---

SIMON

44:35 And you can have multiple work orders on the same job.

BRETT

44:41 No, a work order and the job are the same thing. You can have multiple services on one job.

SIMON

44:48 Okay.

STEVEN

44:49 So a service would be like clean the boiler, flush, a 51 to take a picture of the chimney.

BRETT

45:01 Exactly. So I can put as many services as I want on here. Go out real quick.

KURT

45:09 I think what's confusing is that services that's where we're tracking what... where you're recurring service, the contracts, the preventive maintenance, the quarterlies, that's where services go. There are also instances where a service is going to be an emergency call and that will populate in services as well. But until they're turned into actual scheduled appointed jobs and those jobs are completed, then it falls down to a job, the jobs being created, work order number has been created. But services in those calls that come in emergency or otherwise, most importantly tracking the recurring services, right? Because that's where we're making sure you're not missing an opportunity every three months, six months, 12 months, whatever that quarterly contract that you've signed... with your company or your customer, that's where we're gonna track that.

--- Tech On-site ---

KURT

46:08 Once those are then scheduled, they fall down to a job. Once those jobs are completed, then they're basically green check as done. Does that explain that?

SIMON

46:21 Yeah, I think I get it. Let's go on.

BRETT

46:24 Okay. So this is just showing you guys the work order from the office right now.

--- Access to information ---

BRETT

46:29 Whoever is maybe your dispatchers looking at this right now because we dispatch it, my technician and it's emergency. We need to get to the point where the tech arrives to the job site. So I'm gonna go out to the field and see if this is your mobile application right here. This is all the tech. So I'm gonna do a quick refresh here. Just added a job and service trade is gonna automatically refresh all the time... and I got a little lag, so.

BRETT

46:58 One second... I'm gonna flip this camera off just so this doesn't lag as hard. That's okay.

--- Tech On-site ---

BRETT

47:08 There we go. So down at the bottom Arthur stadium, five PM emergency call there's. My, no heat... click into it. If I'm the technician and I'm driving the location. What I'm gonna do is probably clock in and route. So this is on site a slide over. This is en route. What my technician is gonna do is clock in and route, and this is where they can notify their customer that they are on the way. So, Steve and Simon, I'll send you both one. And hey, I'll be there at 456. That's it from there. My technician, once he actually gets the location, all he's doing is clocking out of en route, gonna

say, hey, you wanna clock in on site? We say, yes, this is gonna track my hours in the background.

--- Tech On-site ends ---

STEVEN

47:50 And is automatically gonna be an email or can it be a text message as well?

BRETT

47:55 So it can't be a text message today. I know that's a request we've gotten in the past, but right now, it is just email.

STEVEN

48:01 Okay. Yeah, because like email is good for property managers. It's not good for super sure.

SIMON

48:11 Site.

BRETT

48:15 Okay.

BRETT

48:19 I don't think we have a way around that right now.

STEVEN

48:22 Okay.

BRETT

48:26 Next step on your workflow is tech completes the call and uploads notes in the service software. So he comes into services right here. This tells them what he's actually performing on site today's. Cleaning that boiler and he's fixing the note.

--- Assets ---

BRETT

48:40 And so any notes he has to put in, you can put it here under comments. You can also see any comments like that one we mentioned before. Sometimes the super isn't there. Whatever it is here's the lockbox to get in. But any additional things the technician does that he wants to notify the office, put it here and he would leave it as a job comment instead of a location comment. So a job is this specific work are?

--- Deficiencies ---

49:14 From there, if he finds maybe he finds a problem on site, he can come in, log in efficiency. He says boiler needs to be cleaned... and this can be, you know, talk to text or it can be typed in up to you guys. From there, I'm gonna take some pictures of the deficiency I'm actually finding on site.

BRETT

49:40 Our customers or our customers technicians really like the audio recording because guess what? They don't have to waste time typing stuff in so they can say, hey, Steve, this boiler needs to be cleaned. I gotta do XYD to fix it. I probably need these parts might need to help her with me as well, but they can really get into detail with what the problem is or if there's the sound coming from the boiler, whatever it is, they can just record it... from here. I'm gonna mark the status of this deficiency. So we're gonna call it inoperable. And then I'm gonna tie it back to the piece of equipment I'm working on giving me that really Rich service history... service trade, select the service line, the type of work we're performing. And the last step is let's mark the status. I'm gonna call this a new deficiency because from the office, we're gonna need to quote out the customer. Any questions on that?

STEVEN

50:33 So if we go to a job site and we find, you know, 10 problems. We're going to have to go through that 10 times.

--- *Assets* ---

BRETT

50:44 Yes and well, are those 10 problems with 10 different pieces of equipment?

STEVEN

50:53 Not necessarily like let's say we go out to survey boiler to leads, we might find that the coils leaking and we recommend replacement. There's. 12 tubes that are plugged that we want to replace. The refractory is damaged. It needs to be repaired. Let's say it's that.

--- *Deficiencies* ---

BRETT

51:13 So, I think the best practice with that would be, yes to log the 10 different deficiencies, but when it comes time to quote, you can put multiple deficiencies on one quote.

STEVEN

51:23 Okay. That.

KURT

51:26 Or maybe Brett use the audio, right? Rather than have the tech waste the time of adding 10 deficiencies, just make one and, you know, describe each one in detail. And then the office then can further break that better use of the text time.

STEVEN

51:47 Either. So these like 151 deficiencies are like all time deficiencies.

BRETT

51:55 Correct. This is every deficiency I've ever found at this location that's open? Or, excuse me, these are all the deficiencies. 151. I have 61 that are open and I've fixed 90 of them.

--- *Assets* ---

STEVEN

52:09 Okay. So where or do you guys keep like notes specific to this call?

BRETT

52:20 That's where I'm gonna, that's what your tech is gonna put under comment specifically for the job? I haven't met any comments yet.

STEVEN

52:27 Okay.

STEVEN

52:34 So...

BRETT

52:34 I put those in and I'm tying these specifically to the job. So this specific work order, anything your tech does on site that's not a deficiency, put it here.

STEVEN

52:47 Okay. So, are the deficiencies that he created today tied to that job? Yes. Okay.

BRETT

52:55 They're tied to the job, they're tied to the piece of equipment, and then we're going to apply a quote to those deficiencies once we get back to the office.

BRETT

53:08 Steve, are your technicians ever filling out like a PM checklist?

--- *Forms* ---

STEVEN

53:13 Yeah, I...

BRETT

53:15 So we can do that right inside of service trade. Essentially, they're gonna come in. They're going to give you more details. It's gonna do exactly that. It's gonna show me a little bit more information from there. We're gonna hit actions and download blank paperwork. So essentially, we will set up dispatch rules for the type of work you guys are doing. If it's a boiler job, they're going to get the boiler form. It's a burner job. They're gonna get the burner form. And these are going to be your guys forms inside the service trade that we just make billable PDF out of. So I hit generate. What we do is we open them up through Adobe acrobat, which is a free app. It just enables us to smart fill these forms on site. What I mean by smart fill is all the information from the job already pre fills onto here. You guys are paying your text a lot of money. You shouldn't be paying them to add and work in the field. So all my job information, my asset information already pulls over. And then whether it's a matter of checking off the boxes like so or it's a matter of filling in free form information here's. What it's gonna look like... questions... pretty simple. So once he's done, you just got to add this back to the job.

--- Tech On-site ---

BRETT

54:22 So we're gonna send a copy. Cool thing is service trade knows that we're clocked into this job. So when I hit add, the service trade says, hey, you wanna put it on that authors emergency call? Yes, I do. Let's go ahead and upload it. PM checklist is on there. Office can see it in real time as well.

--- Parts management (inventory) ---

BRETT

54:41 Any material that your technician uses on site, he's gonna document under job items. So let's say in this case, I used a widget... a couple of those... I used wire, and these are going to be your guys parts. So you put them in as you see fit. But this is just to make sure you guys Bill for the correct amount. When you do send the invoice?

SIMON

55:09 Is that... so that's not necessarily tying into an inventory system that's more tying into some preset list of equipment, right?

BRETT

55:22 Yes. So the way I just did it, excuse me, the way I just did it is just tying into your guys part list inside of service trade. However our inventory system would be right here, open partsledger, so you don't have to leave the service trade application to open inventory to cut a po, to transfer stock or to do a stock look... which I can show you guys right now. If you're interesting.

SIMON

55:48 No, no, go on.

BRETT

55:50 Okay. If your technician needs resources about the asset that he's working on, he can come down here. He can click on that specific piece of equipment in one. See all the information he knows about it. There's our Dual fuel install tag. And if he finds more information on site, you can edit this, enter any information. Maybe you guys don't have this far, for example, warranty information. This is also a space where he has full blown service history at his fingertips. So here's every single a work quarter that happened on this piece of equipment at this or thrash location. So I can click back to January ninth and see who was my technician.

BRETT

56:29 What did he do? Did he take pictures? And what did he use it on site? So it looks like me and Kurt were the text here's. What we did last time we were at this location... we did not take any pictures, but we used eight different job items. Do you think that's going to help your technicians when they're on site?

STEVEN

56:51 So, and then the comments, are those comments tied to this tab or now they're still tied to the site?

BRETT

57:01 Depends. Well, when I click on comment, all my comments in here are at the location level. So I'm gonna see them every time I come to this authorized location. Are there any job comments? It looks like no back on this job, January nine 2023. We did not leave any job comment.

STEVEN

57:16 So, I'm trying to figure out like for us right now, like a guy goes out and then they leave what they did, right? So got the building, you know, call was no heat inspected, the boiler determined that the waterline was too low. Boiler is off on low water, you know, reset the manual, reset, low water cut off and observe boiler run. No further problems. Would that be a comment? Would that be a service?

BRETT

57:51 Your technician is putting that in on site? That would be a comment... or a deficiency if you want to quote it out.

STEVEN

58:01 So deficiency is anything that needs to be quoted up. The comment is everything that we did that doesn't need to be quoted up?

BRETT

58:11 Correct. Any notes from your technician? Hey, Steve site?

STEVEN

58:15 And a service is something that we did that needs to be build.

BRETT

58:21 Correct.

STEVEN

58:23 Okay.

BRETT

58:26 And I know this is a lot of information that you guys are taking in right now. If server state the direction you guys go, every single person in your office is going to be trained.

--- Tech On-site ---

STEVEN

58:35 Yeah. I...

BRETT

58:38 Okay. So, I'm gonna go out of the service history back to my main job. Let's see what else your technician has access to his or his contact. Excuse me if he does need to call the super, you guys would have numbers in here so we could call them or email them. And then you see this generate invoice. I'm sure you guys are not invoicing onsite. Right?

SIMON

59:03 All right.

BRETT

59:05 Permission based setting, you would turn it off for your text. They won't even see the button. Are you getting your work signed off on before leaving?

STEVEN

59:15 Not currently, but we want...

BRETT

59:18 Show you an easy way to do it. We call it a work acknowledgement. So I click into that. I would come in, select my onsite contact, Steve. I'll say that to you today. As the technician, I'm coming in, reviewing everything I said, I did again, they're not gonna see those buttons. They're gonna hit review. I'm then gonna turn my device around to you, Steve on site. You're gonna come in review everything I said, I did. Your guys, t's and c's are going to be at the bottom? You're going to acknowledge those as the onsite contact. You're going to hit confirm and sign? I'm just making sure your information is correct and I'm gonna actually send you a copy of this to your email so you can see what it looks like. The last step, I would get your signature. We would move on... easy enough.

--- *Tech time tracking* ---

BRETT

1:00:04 Anything else from the field that I have not showed you guys yet that you were hoping to see?

SIMON

1:00:15 The clocking clock out at the bottom, right? Do you have a full time management solution? I don't know if we talked about it or not.

BRETT

1:00:28 Expand on that. What are you looking for?

SIMON

1:00:31 I mean, here, you're clocking the amount of, so 12 minutes, right? Let's say you were a clock out, right? So, I assume that that's gonna go to the preparation of the invoice, right?

BRETT

1:00:48 Don't have like a full time. I'm not gonna track your office people's. Time. I'm gonna track your text time.

SIMON

1:00:54 But a full time keeping solution, not just, you know, for the sake of knowing what to charge for the job but, you know, for payroll purposes and all that.

BRETT

1:01:07 So service trade will track any time that you are on a job for payroll purposes. The only way for you guys to track like shop time would be to have a dummy location called shop and then clock into that for any time that they're not actually on a job or driving to a job.

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

SIMON

1:01:24 Okay.

BRETT

1:01:28 So, I'm gonna clock out on say, yeah, everything's done, and we're gonna finish clocking out. I'm done, you can see this job disappears from my scheduled screen, however it does fall over into my completed job so I can go back if I need to... but it's completed right now.

--- *Dispatch* ---

BRETT

1:01:48 So going back to the office, I just wanna make sure I'm hitting everything on the workflow. So field supervisor reviews tech notes. Okay. So dispatchers coming in, they are looking at this work order. And if you guys remember from the dashboard, past jobs to be marked complete, the job we just completed is in this bucket.

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

BRETT

1:02:10 So back on our work order, Simon those clock events that you were talking about, they reflected in here so you can see my drive time, my on site time, but it's flagging it saying, hey, Brett, 538 Miles away from location that's questionable. You should probably go talk to your technician. You can also see Kurt on site time. Do you guys plan on using or doing payroll in intact?

--- *Tech time tracking* ---

SIMON

1:02:35 No, we're trying to figure that out right now. We use Quickbooks time which is tied to Quickbooks. Obviously, we're moving away from Quickbooks. So, you know...

BRETT

1:02:50 Okay. Recently, with companies of your size and stature, I've just heard a lot of companies using adp pay loopy Paychex. Those are all things that we can essentially do an export of these clock events and import into whatever payroll system you guys pick.

SIMON

1:03:06 Yeah. I mean, we use adp for payroll. We use Quickbooks, time for the time keeping is clear.

BRETT

1:03:12 Gotcha. So, yeah, we would use service trade for the time keeping and then put everything or import everything into adp.

BRETT

1:03:22 Okay. So I got my items that I added in, talked about clock events, the deficiency.

--- Deficiencies ---

BRETT

1:03:29 So here's that deficiency that I logged as a technician. Yes, I can find it on this work order right here. I can also get an email notification. So it's gonna say deficiency reporter or thrash there's my boiler that needs to be cleaned. The person who's doing the quoting simply clicks this link.

--- Deficiencies ends ---

BRETT

1:03:48 It's gonna take them right into the deficiency inside of service trade. And I wanna make sure, did I hit everything on the service request workflow for you guys?

--- Tech On-site ---

STEVEN

1:04:08 I think for the most part.

BRETT

1:04:11 Okay. I think the only thing I didn't hit is reviewing those notes.

STEVEN

1:04:15 Let me ask you a question. Actually, how does the technician close the call?

BRETT

1:04:21 So, when I was in the field, I'll grab one of my other jobs here. Take this man's, clothing store. If I was clocked in and I went and did my job. When I go to clock out, says, hey, did you finish this? I'm gonna say, yep. And are you done with this visit? If I hit, yes, that means go and Bill it. If I know that means I'm coming back and it requires follow-up...

STEVEN

1:04:41 Now, if you go back... and it says, what if you don't check?

BRETT

1:04:49 Gonna say the job is complete, however the service is not complete?

STEVEN

1:04:55 Okay. So we don't have a way to make there be any field. So that for technician close out of all.

BRETT

1:05:04 No, what are you looking for?

--- Tech On-site ends ---

STEVEN

1:05:08 Like they have to put notes and they can't close out at all.

BRETT

1:05:12 We are not at a point where that is required today.

STEVEN

1:05:15 Okay.

KURT

1:05:20 Yeah. Currently, the way our system works is what you're speaking to Steve a little bit about the comments that's in our description of work, right?

--- Tech On-site ---

KURT

1:05:30 So it's not the tech showing up saying, okay, this is what I did. It's the tech shows up. What am I here to do here's? A description of work I need to do? Yes. Yes. Yes. Did all that work. So it's not the tech providing the description of work on the site. It's the job that was created here's. Your job, go do this. Does that make sense?

--- Paper process ---

STEVEN

1:05:55 Yeah. The only thing is, so that's good for like the preventative stuff. The difficulty we have is we have so much service where the description is basically like there's no water. There's a complaint that there's being blah, blah blah and it's really up to detect to go out and us to find out what they did. And they're not the best at putting in their notes. Like sometimes they just sleep and don't put in notes. And we don't really want, you know, we want to figure out the best way to make sure that their notes are getting in before they're able to close out the call.

KURT

1:06:32 Are they more apt to like write it down chicken scratch in, on a piece of paper or are they more apt to leave a audio memo?

STEVEN

1:06:43 I think it's different for different people. But sometimes it's just like they just for whatever I don't know, they're not thinking about it or they just have another job and they just start driving through.

--- *Paper process ends* ---

STEVEN

1:06:56 And then by the time, you know, the day is over and then they're going home and then two days go by and realize like, you know, the.

KURT

1:07:03 Yeah... unfortunately... in those instances, while I understand... it's every tech has kind of their unique personality and how they do things... they have to do something.

--- *Deficiencies* ---

STEVEN

1:07:24 You.

KURT

1:07:25 Get the information in there. And again, you then I'd be used to chicken scratch and take a picture of that and add that to the job. And someone try and translate that. They could easily just leave an audio memo in the form of comments, right? So, even though the comments in the job specific to that job, they could just again hit the record button and type the text... audio to text.

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

KURT

1:07:51 So we will make it as easy as possible for them to do their job. Unfortunately, they need to do something.

STEVEN

1:07:58 Based on the.

BRETT

1:08:07 All right. So let's go back to the office just to finish out. The sr, workflow, dispatcher completes final review of notes, labor hours, material costs.

--- *Assets* ---

KURT

1:08:18 Sorry to interrupt, but that's I just quickly in this job. In this particular job, I talked to text for my comments right right now on shop site, you know, water is low,

clean the tubes, right? So that was how I did it for this particular job. I just talked into my phone and there it populates on the job. I made it, you know, available for all.

--- Assets ends ---

STEVEN

1:08:42 Right.

--- Tech On-site ---

BRETT

1:08:51 At this point, once the dispatcher does complete the final review, make sure everything is correct... we're good to go. Pricing is good. What they would do at this point is complete the job simple enough.

BRETT

1:09:11 And then the CSR contact the customer to provide an update on the service request.

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

BRETT

1:09:15 Instead of calling the customer. You can provide the customer with what we call a service link. A service link is essentially just telling the customer everything that we did for them. So I'll pull this up. Your guys logo is going to be right there. Kurt came out to do this job for, no, he here's what he did on site here's. Any comments that were left. I did not make my comment visible to everyone. We would make that the default setting for you guys... here's, any pictures or here's, that PM checklist that I did as an example here's. Where I got my work signed off on. And then here's any pictures we took.

--- Deficiencies ---

BRETT

1:09:51 So Kurt took a picture and he took a video. This is also alerting my customer that, hey, we found a efficiency at your location. You can expect a quote from us sometimes too. So in my head, I believe what we're showing you reduces the amount of calls from your CSR to your customers. Do you guys see that as well?

--- Deficiencies ends ---

STEVEN

1:10:12 Yeah. I mean this definitely reduces, you know, the need for that phone call. Do you guys have? Is there any way... it's like a balance, right? The, something nice about calling in to and saying like, hey, are you satisfied? Are you happy? Is there anything else you need, right?

STEVEN

1:10:37 Like to try and like develop like a further relationship with our customers. But yeah, I mean this is good. I think this alerting feature is nice and it's an easier way to do it. And as we grow, it's more scaleable to you to make a 1,000,000 fall close?

BRETT

1:10:57 Kind of the whole point. And also, I know you wanna make that stronger relationship with your customer. Our whole kind of philosophy is engaging with your customer online and providing the best experience possible for them. So they are coming back to Dual Fuel as their service provider every time versus, you know, Joe.

BRETT

1:11:13 So down the street which does the same work as you guys. But maybe he's just communicating with paper tickets and emails and not really showing them what you guys are doing. Okay. So from there, I am gonna pivot over to the service proposal workflow. So it says dispatcher reviews notes or call from the technician to determine urgency of the proposal that's where they're going through the ticket and finding that efficiency.

BRETT

1:11:41 So let's get rid of those calls from the tech to the dispatcher. They just logged in efficiency and it is in their email as well. So that's what I pulled up right here. There is my boiler needs to be cleaned. It was tied to the initial job that we were working on deficit.

BRETT

1:11:54 Since history is what I just found. Related deficiencies would be any other deficiencies on this specific piece of equipment in the past. So if you guys are running into the same thing time over time, that's a problem that's something, you need to look deeper into... a down on the bottom.

BRETT

1:12:10 There's that picture I took and the audio recording the tech took on site, letting the office know what the actual problem is and what you guys need to quote out. So we're gonna add this to a quote. This is gonna default to repair and you guys can put an expiration in if you want. You do not have to.

STEVEN

1:12:26 What does expiration mean? Like when they have to approve it by?

BRETT

1:12:30 Exactly. Maybe your guys prices change and you say, hey, you have till the end of February. And so next thing is immediate follow up required. Yes, CSR calls the customer to provide an update and price for immediate approval. Do you want the CSR to continue calling or do you want to send the quote online?

--- *Deficiencies* ---

STEVEN

1:12:53 Just pretend immediate is not required because that's more. So like we're on site right now, I got a 51 two and the truck, do you want me to? Do? I write it like the notes might not even be in. The deficiency might not even be recorded. That's like a super fast. So go the other route.

BRETT

1:13:12 Okay. So no. So dispatcher moves call to proposal needed in service software. I would challenge that a little bit. Why would you guys if you have the deficiency? Well, I guess to your point there, if the deficiency is not there, you're not going to create the quote yet.

STEVEN

1:13:27 The deficiency here, the deficiency is the proposal meter like this is built. Our workflows are built for, they're not the best because a lot of the things should be streamlined we want to go off of. So the deficiency essentially is, hey, guys, we need a right? A proposal.

BRETT

1:13:46 Exactly, right. And you guys can report on those deficiencies like I was telling you earlier, run all the reports you want, maybe end of the day, show me all those efficiencies all my text found today. This is what needs to be quoted out, right? And then taking you through that quoting process, you guys have proposal standard proposals, custom.

--- *Quote templates* ---

BRETT

1:14:04 It's custom, right? What you need to write here if it's pretty standard and you have a typical template for that type of repair, use a quote template. I don't have a template for boiler needs to be cleaned, but this is a good example of a template the general work you guys do along with the parts, the labor, the job items you guys use for that standard proposal.

STEVEN

1:14:24 Sure.

BRETT

1:14:28 So, proposal specialists, draft proposal that's what we're doing right now. I'm coming in if I need to add additional stuff there, I can, this is what we're quoting out here's. My parts, my material, my labor. So you guys say, hey, it's gonna take two hours. We need... three of these and let's say... 10 of these margins are tracked inside of service trade, you guys pick the level of detail that you want your customer to see.

--- ST app contracts and pricing ---

BRETT

1:14:58 So whether it's grant TM line items. So on, then you pick that pricing contract for the customer. If I were to go change this pricing contract, you can see it changes the mark up rules based on the contract I select, makes sense?

STEVEN

1:15:13 Yeah. What's going on with the labor? Why is there no unit cost?

BRETT

1:15:17 Because we probably didn't put a unit cost in under the item?

STEVEN

1:15:22 That doesn't populate, favor... labor doesn't populate?

BRETT

1:15:29 No labor. Does I'm, saying we're working out of a demo account and it's not accurate information.

STEVEN

1:15:35 Okay.

--- Quote templates ---

BRETT

1:15:35 So there is probably just no cost associated with that labor.

STEVEN

1:15:40 Okay. So.

BRETT

1:15:42 So, I see my margin at the bottom, save it in. We're good with 40 percent. What I'm gonna do from here, is I'm gonna actually send this out to my customer. Do you want me to send this to Joe as well?

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

STEVEN

1:15:53 No, okay.

BRETT

1:15:56 Before you guys send it, you pick and choose what you're going to include, tell that story to the customer. What you guys did? Hey, maybe your technician curse a little bit on the recording, turn that off. It's not customer friendly. That picture does tell the story.

STEVEN

1:16:08 So, all the pictures they took on the job would be in the attachments?

BRETT

1:16:13 Correct. And you can pick and choose what goes out with those toggles.

STEVEN

1:16:16 And it's pulling pictures from the job. Okay? And now, let me see this message real quick.

BRETT

1:16:29 I'm sorry, what did you say?

STEVEN

1:16:31 The message?

BRETT

1:16:33 Apologies. So, this is the quote template that I put in. You guys can add additional stuff if you want.

STEVEN

1:16:40 So, that, is that what would be in the actual body of the email?

BRETT

1:16:45 This is going to be in the body of the email that goes out. It's also going to be on the actual quote.

STEVEN

So, you just set this up as the standard for the body of the email? Yes. Okay.

BRETT

1:16:59 On quotes, you can also make POS required of customers, just a little toggle switch here. And I would make that default setting based on your guys workflow. If you're chasing POS, make it required. So I sent that to both you guys and I pulled it up here. This is what your quote is gonna look like. Your customer gets this. They know what you guys wanna do for the actual service that needs to be completed. All of your multi media is going to be here. Depends how you guys break this up. If it's full line items, just grand total up to you. And then these are Dual fuel teas and sees at the bottom.

BRETT

1:17:39 From here customer, what they can do is they can approve the quote, get you back to signature right away or they can request changes. Hey, your friends down the street are gonna do it for 10 percent off. Can you guys match it? Whatever it is?

BRETT

1:17:56 I would go through and approve this. If I was your customer. This is a preview. So it's not gonna work. You guys have access to your email?

--- *Deficiencies* ---

STEVEN

1:18:02 Yeah, I just got.

BRETT

1:18:04 Perfect. So, I'm gonna do a quick refresh back in service, trade quote status says approved. I do have a history of this. So I can see Brett in the field, adding that picture of that recording. I sent it to both you, Steve and Simon, Steve.

--- *Quoting* ---

BRETT

1:18:19 You're the one that viewed it. This is your IP address. You approved it at 516 on February fifteenth, kind of a CIA situation. Customer tells you never sent me a quote for xyz. You have a history that he viewed it four times today.

BRETT

1:18:36 And then from there, would you guys trying to follow with your workflow here? Would you guys turn that quote into a job right away?

--- *Quote templates* ---

STEVEN

1:18:45 Yeah.

BRETT

1:18:47 Perfect. So, if I'm going to authorize stadium on Friday, I can add this to an existing job to reduce the amount of truck roles to that location. If that's not the case. I'm creating a brand new job from this quote. I might throw a due date in.

--- Dispatch ---

BRETT

1:19:00 I would copy over all attachments and comments and simply create this job. And this is just another work order that's gonna sit in the unscheduled status until we schedule it from that dispatch board that you guys saw first?

BRETT

1:19:16 Questions?

STEVEN

1:19:20 You mentioned at the very beginning that you guys work with other boiler companies. Do you work with anyone in our market?

--- Dispatch ends ---

BRETT

1:19:29 Do you guys know millerprock or Nicholas?

STEVEN

1:19:32 Yeah. Yeah.

BRETT

1:19:33 Just became a customer four or five months ago.

STEVEN

1:19:37 Okay.

BRETT

1:19:39 I worked pretty close with them... that's just really recent that's why I remember them. I can do a search for other boiler companies.

STEVEN

1:19:48 Yeah, I'd be curious.

SIMON

1:19:51 You know, to talk to anybody, you know, who might.

BRETT

1:19:56 Yeah.

STEVEN

1:19:57 Maybe?

BRETT

1:19:57 We know... absolutely. So I don't think you would know California boiler out in California, right?

STEVEN

1:20:05 You, you work with California boiler?

BRETT

1:20:08 We do.

STEVEN

1:20:09 Yeah, we, I don't know them, but I know about them. We could talk to them. I...

BRETT

1:20:15 Okay. I can see what I can do there... not my account. So just a matter of me reaching out and kind of figuring out if they're okay. Was talking to you? Okay? That works. Cool. Okay. What other questions do we have about the quoting workflow, the service request workflow before we move?

STEVEN

1:20:40 Could you go into the, some of the reporting like deficiencies?

--- Deficiencies ---

BRETT

1:20:47 Absolutely. A couple of things here.

BRETT

1:20:55 So, first things, first efficiency reporting, there's all these different parameters that I can drill down by. If I wanna see all the deficiencies that reported... simple search, if I wanna narrow that down to a date range, I can do that here. If you do, if you guys do get to a point where you have salespeople managing these deficiencies, narrow it down by that as well. Here's. All my deficiencies here, giving you the resolution, giving you the description. And when it was found.

STEVEN

1:21:22 Right. Hold on. So, these are all deficiencies of all time.

BRETT

1:21:29 What was that last part you said?

STEVEN

1:21:31 These are all deficiencies of all.

BRETT

1:21:35 These are all deficiencies found by me of all time. Yes.

STEVEN

1:21:39 Okay. So, how do I see? Like all deficiencies from today?

BRETT

1:21:49 Found today? Delete myself. These are all the efficiencies found today.

STEVEN

1:21:55 Okay. So now, how do I know if the proposal is generated based off this deficiency?

BRETT

1:22:01 Was generated based off the deficiency?

STEVEN

1:22:04 A proposal, like if a proposal actually?

BRETT

1:22:10 Resolution right here would say verified.

STEVEN

1:22:13 Verified. Yeah. So new means it came in. Nothing was done. Verified means it went out.

BRETT

1:22:23 Verified means we have sent a quote to the customer.

STEVEN

1:22:25 Okay.

BRETT

1:22:26 And then fixed mean fix?

                         STEVEN

1:22:29 Fix means they approved. It, is there something?

                         BRETT

1:22:34 You guys?

                         STEVEN

1:22:34 Verified and fixed?

                         BRETT

1:22:40 Just find out?

                         STEVEN

1:22:45 Like approved... would imagine?

                         BRETT

1:22:53 There we go. So there, yeah, here you go. You got...

                         SIMON

1:22:56 New.

                         BRETT

1:22:56 Out for quote, customers notified out for repair fixed, they said no or invalid be like voids?

                         STEVEN

1:23:03 What about approved?

                         BRETT

1:23:05 It does not appear that's an option... it would be out for repair.

                         STEVEN

1:23:13 Out for her. Okay?

                         BRETT

1:23:18 As an approved quote, then you guys are going out to fix it, this would be the next step. You mark it as fixed, and then it's got in your?

STEVEN

1:23:26 And then when we wait, so when we send it would be verified or I'd be out for quote?

BRETT

1:23:34 I think I might be thinking about this wrong. Give me one sec.

STEVEN

1:23:37 Because we like what we want to be able to do is go in and be like, okay, like here, all the problems that came in today, what's the status of right?

--- *Deficiencies ends* ---

STEVEN

1:23:48 That's very important. All proposals should be out within 24 hours. So, on a daily basis, like I want to be able to go in at five PM and see the, you know, only things that came in from today are still in there. And then tomorrow like those should be got.

--- *Quoting* ---

STEVEN

1:24:05 So right now, what's gonna happen is I'm trying to figure out how to get like, you know, all of our deficiencies, which, you know, right now we call like all of our recommendations, check the status of the proposals, what was approved but was not approved. So, we know what to follow up on, make sure everything's actually getting out on time.

--- *Deficiencies* ---

STEVEN

1:24:28 And then like, is there a way to like customize this report? So it's just like saved... or like every time I go in, I need to be like owner reporter found on from to resolution status.

BRETT

1:24:44 So, if you're just trying to find the efficiencies for the day, I mean, you're gonna have to change the date based on today. Each time there's no way to, well, that's not true. You can save this as a bookmark and just have it like up here and say, hey, I'm gonna go run my deficiency report that would save your filters. But that's the only way.

STEVEN

1:25:03 Okay. So, I'm just trying to think about like for a person who needs to actually write proposals, they're dealing with a list of over time, a 1,000,000 deficiencies. Like how does this even get sorted?

BRETT

1:25:20 You said sorted.

STEVEN

1:25:22 Yeah.

BRETT

1:25:23 Typically, we're assigning sales.

STEVEN

1:25:26 We don't have salespeople.

BRETT

1:25:29 So, who's doing the quoting?

STEVEN

1:25:31 We have a person who drafts all of our proposals.

BRETT

1:25:36 Is just one person?

STEVEN

1:25:37 Yeah.

BRETT

1:25:39 So, all deficiencies would get assigned to that one person in service trade, they would be called a salesperson, just what we call it. But they would come in here and run the report for today. They would see all the different resolutions. I mean, I...

STEVEN

1:25:52 So, go now, let's go back to like... the last month, let's say or all time, let's go to all time.

STEVEN

1:26:06 So, you can, so, how is the sort?

BRETT

1:26:11 Sorry by.

STEVEN

1:26:14 Can you?

BRETT

1:26:19 It's a great question.

STEVEN

1:26:21 Like because now you're showing me things for nine years?

BRETT

1:26:26 I know.

STEVEN

1:26:27 And I wanna see what I need to do right now. And now, I'm gonna need to scroll through nine years of deficiencies.

STEVEN

1:26:38 Let me.

BRETT

1:26:38 Look.

BRETT

1:26:44 That's why I would, probably, I think dates are important unless you have a better answer.

--- Deficiencies ---

STEVEN

1:26:49 There's gotta be something else that this doesn't make any sense of.

BRETT

1:26:55 I mean, we ran a report for every deficiency. I can't you know, how you would flip like sort of sending sort to sending? It doesn't look like.

STEVEN

1:27:03 My, like my job is to do proposals. So like where am I open deficient?

BRETT

1:27:09 So... I would say show me not verified, show me all the new deficiencies... here's. All my new deficiencies. And this is a demo account. Yeah. So there are ones from 2014 that we've never quoted out, but you guys are going to quote everything

every single day. So, you're gonna only have things from today because once you turn the deficiency into quote, it's not in this report anymore. It's my quote report.

--- Quoting ---

STEVEN

1:27:34 Right. So now, what's the step after?

BRETT

1:27:40 Verified by the customer and then you guys go and fix.

STEVEN

1:27:43 So go to. So what is verify?

BRETT

1:27:48 Verified means the customer has received the quote and approved it.

STEVEN

1:27:55 What about if they received and didn't approve it?

BRETT

1:28:01 Would say rejected on the response?

STEVEN

1:28:03 No, what if they didn't do anything?

BRETT

1:28:06 It would still be in the new status?

STEVEN

1:28:13 I'm getting lost here. So, so how do you know if you sent it out?

BRETT

1:28:18 You would run a quote report? Show me all the quotes that have been... submitted... here's. Every quote that's been submitted to a customer?

--- Deficiencies ---

STEVEN

1:28:36 This doesn't seem right to me.

STEVEN

1:28:43 Mean, I understand if I'm the person who's supposed to be writing proposals, right? I just want to deal. I just wanna look at my deficiencies page, which essentially is like all the recommendations that come in from my technicians, right? And now, my job is to take them from a deficiency to a proposal, right?

--- Quoting ---

STEVEN

1:28:59 To send it out to the, to the customer, right? So I should have a status and it's like, okay here's a recommendation. I didn't do anything with it yet. Then I should have a status like, okay, I sent it to the customer. So I know I don't need to actually make a proposal anymore. Already made the proposal. Now, I should be able to see the customer approved it. The customer rejected it or customer did nothing with it because that's who I need to follow up, right? Like within 24 hours of the proposal going out. If it's not approved or rejected, we want our person getting on the phone and calling them and saying, hey, I saw you got the proposal. Not sure if you have any questions about it. Won't discuss it with you. Okay?

BRETT

1:29:40 I think I may have to... I understand, I think I might have explained that wrong because what I'm looking at right now is the status is the status of the actual deficiency, but the resolution is, how are we gonna fix this deficiency? So when it's out for quote, it very well might be still a new deficiency because the customer hasn't approved that quote, but it's gonna say out for quote. Does that make more sense?

STEVEN

1:30:08 When you change it to new and you go to search, it automatically changed the resolution... say.

BRETT

1:30:18 You see that?

--- Deficiencies ---

BRETT

1:30:26 That's interesting.

STEVEN

1:30:31 And obviously, like, so this deficiency, right? Where do you even go into this deficiency? Do you click on the asset to go into the deficiency? Or how do you, even from here, how do you even get to the deficiency?

BRETT

1:30:46 I'll click on the job.

STEVEN

1:30:48 So, now you go to the job, right? Okay. Now you go to the deficiency and now let's create a quote off of this deficiency.

BRETT

1:31:00 Yes, not inoperable. Efficiency.

STEVEN

1:31:02 Okay. So... okay, for that.

STEVEN

1:31:12 Okay. So.

BRETT

1:31:14 Go through... that same process.

--- Quote templates ---

BRETT

1:31:25 I put whatever I need to put in. So I'm gonna apply a template and I'm just gonna grab the first one. I...

STEVEN

1:31:29 Yeah.

BRETT

1:31:31 And then I would send this out and I'll send it to myself.

STEVEN

1:31:33 Okay. So now, let's go back to our deficiency tail, right? So that was this. So now, why isn't this resolution changing like out to quote? Because now, for me, who isn't working day to day in the service form? I wanna see what's going on. I can't even see if this proposal was set up and this is one of the main things I want to be able to do.

--- Quoting ---

STEVEN

1:32:00 What are all the deficiencies? What's the status, what's been approved? What's rejected, what hasn't been sent out yet because this is new, but the proposal actually went out which is a good thing, but I don't know.

BRETT

1:32:15 So, we're talking about two different things. We're talking about deficiencies, and we're talking about proposals. I understand they're connected that said the

deficiency report is just showing you everything that was found once it's turned into a quote. You're gonna run a quote report because then you can show me everything that's been approved.

STEVEN

1:32:37 Right. But so where are my deficiencies though that don't have boots?

--- Deficiencies ---

BRETT

1:32:42 Under the deficiency report because they're still in deficiency.

STEVEN

1:32:46 Yeah. But there, these are not deficiencies that go have quotes because the first efficiency has you just sent it. So now, I need to cross reference your deficiency report with the quote report to see which deficiencies don't have quotes.

--- Quoting ---

BRETT

1:33:09 I see what you're saying.

SIMON

1:33:10 The problem is that we're going to have, you know, 100 efficiencies a day, right? Which could potentially become like five quotes or something like that. And, you know, every week we're getting 500 deficiencies and just gonna be like an endless sea of deficiencies very quickly.

STEVEN

1:33:28 And we can't even tell which ones... have been quoted and which ones haven't been quoted. And like, you know, so we have this new service manager starting, right? And like he needs to be able to see like, okay here's the 10 deficiencies that came in today. I wanna make sure that they all have quotes within 24 hours, but there's no easy way to do that.

--- Quoting ends ---

STEVEN

1:33:55 There's... this little mind blowing me. There's got to be like this. Like I can't leave. This isn't like seems so basic. You guys are doing way more difficult things than this.

BRETT

1:34:12 I agree and hurt, you know, this as well as I know this, am I doing something wrong?

KURT

1:34:19 No, so.

STEVEN

1:34:21 So, are we crazy or rerunning our business completely wrong? Like I don't know, maybe.

KURT

1:34:31 No, and I understand, I think.

STEVEN

1:34:36 Really? How did that change to out support now?

BRETT

1:34:43 What we were looking at? I scroll to the end. We were looking at the beginning which were in 2014.

--- *Quoting* ---

STEVEN

1:34:50 Look, go up the resolutions out for quote, but the status is still new. So there, you have a status that's new, and you have a resolution which is out for quote you?

BRETT

1:35:02 The deficiency is still new because you guys haven't fixed the deficiency, but the quote is out to the customer.

--- *Deficiencies* ---

STEVEN

1:35:12 Okay.

BRETT

1:35:13 This will only change it'll, change to verify.

STEVEN

1:35:17 No, but the one you just sent a proposal to yourself for the status is still new. It's still a deficiency. We do not fix the deficiency, but you did send out a quote to the customer, but the resolution did not change to.

BRETT

1:35:34 You remember what location I did that on... Julia Allen?

STEVEN

1:35:43 Like I get it, deficiencies in quotes are set, right? So we should be able to have our deficiency status, which is like there's a new deficiency. The deficiency has been resolved. The deficiency hasn't been resolved or whatever. But associated with that deficiency is seemingly a resolution.

--- Quoting ---

STEVEN

1:36:06 And the resolution should be like, we sent the resolution after quote. The resolution got approved by the customer. The resolution got rejected by the customer. So we have like this matching thing where it's like, you know, we got a recommendation and we sent the proposal out total, got approved or rejected or nothing happened yet. And this is our follow-up...

--- Quoting ends ---

BRETT

1:36:32 I understand what you're saying to me. I don't... honestly don't have an answer right now because you're right there's no way... that it shouldn't work the way you guys are saying. Is that how it works in your industry?

STEVEN

1:36:47 Yeah.

STEVEN

1:36:52 I...

BRETT

1:36:52 I might need to talk to my team about this and get back to you.

--- Deficiencies ---

STEVEN

1:36:54 Okay. Mike.

KURT

1:36:56 Only comment would be, I think that having done this for so long that the other there, there are just so many different macinations that for us, it's typically. All right. I'm on the job, I'm doing this service call, I identify something additional that's deficient that we can quote out. I quote that as a deficiency. It comes to the office, turns that efficiency into a quote. We put the quote, it goes to the customer and they take it from there. I think our options are more nuanced, which are at a very high level. You want it to be dumb down.

KURT

1:37:40 But I think again, our customer base has driven us to have these different nuances in terms of stages of where they exist that, yes, I'd be more simple to your point, right? If it's just like, okay, quote, was it sent? Did anybody pick it up? Anybody? Look at it as an, looked at this quote? Do I need to resend it? Is it approved? Was it rejected? Why was it rejected? So... I think Brett, right? We need to be a little bit more specific about, to your needs. I just, I feel like I'm looking at this, you know, in the demo account above on my own page and I think it's very nuanced, but I feel like as we talk through it.

--- Deficiencies ---

STEVEN

1:38:26 You mean it's very new ones? Like could you give me an example?

KURT

1:38:29 Yeah. Cause right? The severity field has four different options all in operable division and suggested. Okay. So this system, this boiler just doesn't work or this boiler is deficient, right? It's only... it's running at 70 percent capacity or it's suggested like this is not something that's you need to have fixed immediately, but, you know, you don't wanna, you don't want it to break down at the worst possible time. The status is got five different statuses, all new, verified, invalid, fixed. And then the resolution we've got to for eight different stages.

STEVEN

1:39:16 So... you can change the resolution independently of the steps... right?

BRETT

1:39:31 Resolution independently of the status, you... go to a quote.

BRETT

1:39:45 Yeah.

KURT

1:39:45 As this deficiency works its way through the system, right? If it's now?

STEVEN

1:39:50 Click on a deficiency, right? Let's go through a deficiency.

STEVEN

1:39:59 Okay. So now here's...

BRETT

1:40:04 Here's, a efficient.

STEVEN

1:40:05 Beautiful. Now, let's say we sent out a proposal for this deficiency. So this is a new deficiency. A proposal went out. Can you click on the resolution and change that status? Yes. So make it out for quote. And now do your quote? Maybe that's all you have to do?

--- Deficiencies ends ---

BRETT

1:40:39 Should I send this?

STEVEN

1:40:40 Yeah, why not?

BRETT

1:40:44 Gonna go to Susan Warren? I go back.

STEVEN

1:40:49 Then downtown, Ray. So now, let's go back to or deficiencies?

STEVEN

1:41:07 So, where's that one? We just set?

BRETT

1:41:10 Right here, but it changed to verify and I don't know why.

KURT

1:41:19 Maybe you did something.

STEVEN

1:41:21 I don't know... you.

BRETT

1:41:24 See the quote number?

BRETT

1:41:35 That's the job number... doing something wrong?

KURT

1:41:40 Automatically in terms of verified once the office sends it out.

BRETT

1:41:45 I'm thinking and I thought verified as when the...

STEVEN

1:41:48 You guys get with your team on this, and just, I think there's gotta be some, something. I don't think what we're asking for. I think it's probably pretty standard and I have a hard time believing that like you got 1,100 customers who don't want to know the status of their quotes.

BRETT

1:42:08 I think you're right there probably is the solution. And Kurt and I are blanking on it right now. So, instead of spinning our wheels, let us get back to you on that one.

STEVEN

1:42:15 Okay.

BRETT

1:42:17 Cool. Okay. Should we, what else do you guys wanna see? Should we jump into the sign service proposal?

STEVEN

1:42:27 No, I don't think it matters because it's very similar. Why don't we spend the rest of the time we have looking at service contract management, recurring tasks, things like.

BRETT

1:42:39 Okay. Let's go to our.

--- Recurring maintenance ---

BRETT

1:42:54 Got, so service trade itself is not going to generate the service contract for you guys that said we are going to house all the information that got approved within the service contract, everything that you told your customer you would do is under services, every work order of you guys going out for different instances to do that work is under jobs, the piece of equipment you guys maintain under that contract is under assets to answer your question as far as tasking that's the services?

--- ST app contracts and pricing ---

BRETT

1:43:36 Makes sense.

STEVEN

1:43:39 That's like the ongoing maintenance, right?

BRETT

1:43:44 Correct. Because you're not signing a contract for reactive work.

STEVEN

1:43:48 Let me tell you how our like service contracts generally work. So, you know, 24 seven emergency service. They get preferred labor rates. So we wanna, we would want to capture like which buildings have a service contract versus which don't have the labor rate, you know, pre populated so that the office doesn't make a mistake.

--- *Quote templates* ---

STEVEN

1:44:10 They are a service contract. They're not a service contract, customer... boiler, cleaning, burner overhaul, combustion efficiency test. Those are the things that are done on an annual basis. So that's a standard service contract for us. So let's walkthrough how that all?

BRETT

1:44:28 Captured. Okay. I'll lean on you as, in order to tell me what to put in when you guys are live with service rate, you're gonna use a template.

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

BRETT

1:44:37 So you don't type this in every time you would say the asset this is occurring on and you said boiler cleaning first one?

BRETT

1:44:48 The service contract is the pricing contract. So this has your or your preferred labor rates baked in your unit price is baked in at whatever you agreed with the customer.

STEVEN

1:44:58 Okay. So that just say like 2023 service contract price?

BRETT

1:45:04 Yeah. Exactly.

STEVEN

1:45:06 Now, just real quick when you're doing an actual quote, I imagine you can override your contract pricing. Would that be accurate?

1:45:18 You can decrease?

STEVEN

1:45:19 Our margin or decrease our margin on a specific?

BRETT

1:45:24 That is correct. And it will have a history of who did what?

--- Recurring maintenance ---

BRETT

1:45:27 Okay. So, with this service that we're setting up if you want preferred technicians, hey, Kurt is really good at boilers, Adam, ad, Kurt... and then you schedule it for how, when is this going to happen? Is this a recurring service?

STEVEN

1:45:46 This is not a recurring... service?

BRETT

1:45:55 Okay. How often should this occur one time? Do you have a single day to get that done? Do you have a whole month or do you have a custom date range? What does that mean? Do you need to get it done today? February fifteenth? Do you have the whole month of February to get this job done? Or do you only have two weeks in February according to your customer?

STEVEN

1:46:16 So, let's say, because it's an interesting question, right? We have 300 service contracts and all of the preventative maintenance generally gets done between may to September, if we put in custom, may to September for all of them, will they auto schedule for us to make it all work?

--- Recurring maintenance ends ---

STEVEN

1:46:42 Or are we going to end up having to just pick the days within that? Because ultimately, we're gonna to pick a specific day. We're gonna need to notify the customer that we're gonna be there, you know, on Thursday July eighth at eight a. M. And it's gonna take about four hours. If we have the ability to put in all of our tasks and say this task is gonna take four hours. This task can take four hours and it does the brain thinking for us to say, okay, guys, this is how you could schedule it, go to this building at this time, go to this building after that would save a lot of, you know... time for people in the office. But so, is that, what happens?

--- Recurring maintenance ---

BRETT

1:47:24 So, it's not gonna automatically schedule for you guys because we don't want to automatically change your schedule. Let me save this in and I'll show you how we manage those recurring inspections.

STEVEN

1:47:36 Okay. So.

BRETT

1:47:38 So, we have this report called service opportunities. Essentially, it's report you guys based your parameters off. So I'm gonna do four months out to try to get that job that starts in may in here. This is the office that you guys define that you're working out of and whether we want to look for all services, one time recurring approved, I'm gonna look for one time so we can look for that job there it is. So we would select this one, pick the job type, say it's a service call... and this is a bad example. But if there were multiple services at this location, it would put it all on one ticket for you guys. When we create the job, create the work.

STEVEN

1:48:19 Right.

--- *Dispatch* ---

BRETT

1:48:21 So, would you like me to rock with this right here or do you want me to get a bunch?

STEVEN

1:48:27 No, just go with this one.

BRETT

1:48:31 So we create one job. Everything disappears where it goes is over onto our map based scheduler which is more for scheduling the work that you know of ahead of time. Not really your emergency calls that come in... close. Some of these down. See that Arthur ash is right up here in New York. So I had a preferred technician on there. It is like blue, Chris kid. Well, is my preferred technician? He already got applied to it... but you can see there's an appointment for the sixteenth at eight a. M, it's expected.

STEVEN

1:49:07 Set it up for the sixteenth... you did.

BRETT

1:49:13 I did. Yeah.

STEVEN

1:49:17 Okay. Where did you do that? I didn't see you pick a date.

BRETT

1:49:24 Back on that service ops page.

STEVEN

1:49:28 Okay. So now... if you had 100 tasks that needed to be scheduled between may till September... and 20 of them were already scheduled. Then when you go into this interface, you'd see 20. And when you go into the last screen interface.

BRETT

1:49:52 Yes... because eight needs to be scheduled, but in its entirety, there's 20 jobs that you're doing eight needs to be created as a job.

STEVEN

1:50:06 Right.

BRETT

1:50:06 Did...

STEVEN

1:50:07 The job though. So when you go back one? Yeah. So this is going to be only jobs that are not yet scheduled.

BRETT

1:50:17 This is services that have not been turned into jobs.

STEVEN

1:50:21 Okay. And once you have a service that gets a date, it becomes a job, correct? Okay. You can create a job without assigning it to a technician? Yes. Okay.

BRETT

1:50:38 For example, this job up in north jersey. This is a job. It's gray at metlife stadium, but gray means jobs are unassigned and unscheduled. No one assigned to it. It's not on the calendar yet. So, as far as scheduling that technician, it's a matter of, hey, I'm gonna take Angelo drag and drop into that pin. It turns green. We know Angelo is assigned and then picking the day in which I wanna schedule this two. So I'm gonna schedule Angelo for Friday the seventeenth. So I can see there's an appointment, the seventeenth to eight am. If I wanna make this a multi day appointment, I drag them to a couple of days next to the calendar. There's a two day appointment next to the person there's.

--- *Pricing* ---

BRETT

1:51:18 One technician. But if I add Alex to this job next to the person there's, now a two here's, the colors of the technicians associated with this job...

STEVEN

1:51:27 So, what if I wanted to see, you know, for us, we might have 300 service contracts and each service contract has, you know, between three to four things that need to be done in a given year.

--- Pricing ends ---

STEVEN

1:51:39 So, let's say we have a 1,000 services. Can we run a report right right now? We have a massive excel sheet that says here's all our addresses here's. All the things we have to do and, yes, it was done. Yes, it was done. Yes, it was done. Yes, it was done. No, it was, are you able to run a report showing us all 1,000 tasks which were done, which were not?

BRETT

1:52:05 Best way to do that?

SIMON

1:52:08 I sent you that excel?

BRETT

1:52:11 You did that?

BRETT

1:52:20 You are talking about this, right? These are all your, what?

KURT

1:52:25 Yeah, I...

STEVEN

1:52:30 This is a different one actually is.

SIMON

1:52:32 Cool.

BRETT

1:52:35 Okay. But the question is still, how do I know what's been completed? And what hasn't of everything?

STEVEN

1:52:42 Correct.

BRETT

1:52:45 So...

--- *Dispatch* ---

BRETT

1:52:54 I don't know that you can see everything in one list because service opportunities is everything that's not done. And then everything that is done, you would go completed jobs. Unless I'm looking at this wrong, give me one second. Yeah, everything complete. You would run a report for all appointments, complete everything, UN, complete. You would run the service opportunities report to schedule those jobs.

STEVEN

1:53:25 But this is only jobs.

BRETT

1:53:29 All service is complete.

STEVEN

1:53:33 Like here, let me share my screen with you real quick.

--- *Dispatch ends* ---

STEVEN

1:53:56 Okay. Are you able to see out?

BRETT

1:53:59 I don't see excel is your computer background.

STEVEN

1:54:02 Now... I see it. Yep. Okay. So... is it too small?

BRETT

1:54:18 Good for me?

STEVEN

1:54:19 Okay. So this is how we have it, right? So here's a management company building address boiler burnt. This says what's included and what's not included in their service contract.

STEVEN

1:54:34 Okay? Then over here, we have the date of the cleaning, the date of the overhaul, and then the stats, right? So it's confirmed, it's not confirmed or it's completed. And then some other, you know, items on. But basically every single one of these rows, like, you know, anything that's included under a BI, anything that's included under lower cut off, anything that it's included under and bars, plus every single building cleaning and overhaul are all individual tasks, right? So if you go through all of it, maybe we have a 1,000 or so tasks and we need to make sure that every single one of those tasks actually gets done. So, you know, ideally when we first get a building and we get a service contract, every single service contract should be set up in a way where we generate a 1,000 services, right? So now that we have a 1,000 services, are we able to run a report to show us what are all of our services that like haven't turned into a job? Or what are all of our services that aren't completed yet?

BRETT

1:55:53 So, services that have not turned into a job? Is that service opportunities report that I showed you? I think what I'm trying to tell you is there's no way to get a report of everything both completed and on completed in the same report.

STEVEN

1:56:09 Okay. So we can just get a list of like all of our services.

STEVEN

1:56:19 I...

BRETT

1:56:19 Missing something.

STEVEN

1:56:22 Because again, I would think for that, like let's say, for example, we have a new business line, right? Called backflow preventor testing. We charge 300 bucks for backflow preventor and I want to see how many back load preventor tests, you know, we have. So how do I see? Like how many are approved for some of them, we've done some of them, we haven't done yet. There's no way for me to see just like all the backflow preventor tests that we have to do in a given year.

BRETT

1:56:53 Let me think about that. The best way to do that would be to run the report at the beginning of the year through this. So I run a report for everything, all services and then whatever time frame you want. And then you would go back flow specifically. And I don't have that one. This would show me all my backflow jobs, but this is showing you everything that you have yet to complete, not everything in its entirety because this is where you would schedule jobs.

STEVEN

1:57:29 Okay. Is there a way to just do like a massive like excel export? Because some of these things also like, you know, if we can just extract all the data, like everybody probably wants to manipulate it a little bit differently. If there's a way to just like extract all the data and then we can play around with it.

--- Accounting ends ---

STEVEN

1:57:53 Like what I like about ServiceTrade so far is I think you're engaging with the customer is really good, right? I like the fact that it's like when a technician gets the call, you get a, the customer. I like the fact that when a technician finishes a call, you can have an email going the customer... you know, I like those things but concerned about right now is like high level visibility into like overarching like what's going on day to day or year to year, and how we can kinda see those things, right? Like do you have a dashboard where it shows like this is your close rate? Like this is how many quotes you sent out? Is the person like these are metrics that currently we're getting reports on, but it's through excel, which is very time consuming, right? So we're doing like exports from helpdesk, and then we have to, you know, play around with it. But like this is an important metric to us. So like right now, I can tell you exactly what a close rate is. I can also tell you what I think our close rate should be. And then the delta is a lot.

BRETT

1:59:07 So, it...

KURT

1:59:08 I, I'll share my screen.

BRETT

1:59:10 Got it. Yeah. Kurt got you covered here.

KURT

1:59:21 So, you see my screen? Yeah, perfect. So, yes, and apologize you about the quote and the efficiency in a nuance. I've been doing a little bit of research in the background. But first of all, to answer your question... all of the data that is housed within service trade in whatever form, right?

--- Quoting ---

KURT

1:59:48 How many quotes, how many deficiencies, what's my approval rate? How am I doing? Can be pushed up to quick site and viewed in this type of format. Now, again, it's a demo account. It's just a visualization of what we think is important. If there is

something specific that exists data wise within service trade, you can effectively put that into a pie chart or graph. However you want to visualize it... through.

--- Implementation and ongoing support ---

STEVEN

2:00:20 Is, is quickie part of a service tree?

KURT

2:00:24 So we use Amazon web services for the client and I believe Redshift is where all the data gets pushed up to. And then Redshift pulls it into quick site that.

STEVEN

2:00:37 A separate subscription.

KURT

2:00:40 At the enterprise level, this is part of the purchase. Now after the first, right? I'd love to say that, yeah, you should buy it immediately but the data is not there for you really to mind. What we like to tell our customers is walk before you run and get acclimated with service trade. And as you're inputting the data, you'll be able to visualize that data, right? I, if you use it for the first month, it might not be as meaningful as something after the first six months or 12 months, what have you, right? And so you can go from the premium then up to enterprise. But here at the enterprise level, so... if I click on the dashboard, these are just again dashboards that have been built internally as a generic visualization for the data that, and how it can be presented to you. So if I looked at boost revenue?

--- Type of work ---

KURT

2:01:38 So again very high level, where is the majority of my revenue coming from? Is it from inspections, repairs, installations? What have you? And you can look at it graphically that way, revenue by month, right? You know, we're our manpower needs in the summer months are greater than in the winter months or vice versa.

--- Quoting ---

KURT

2:02:00 You can look in at the biggest open deals jobs that you have and drill down further, right? This is one that we really focus on the most jobs with deficiencies or percentage of deficiencies with quotes. And then quote approval rate. What we found is the quote approval rate is pretty much static across our 1,000 plus customers.

--- Pricing ---

STEVEN

2:02:22 What is it?

KURT

2:02:23 It's about 55 percent... give or take. So.

STEVEN

2:02:27 29 point five.

KURT

2:02:31 This is a demo account.

STEVEN

2:02:33 You saying it's 55, right? Across your actual customers?

KURT

2:02:38 Yeah.

BRETT

2:02:40 Yeah. This is all demo information?

STEVEN

2:02:42 Yeah, no, but that 55 is not demo information that's real information, right?

--- Pricing ends ---

KURT

2:02:47 Now, this is sandbox information... you got?

STEVEN

2:02:53 You said the 55 percent is static across like off.

KURT

2:02:58 The average across our customer base?

STEVEN

2:03:00 Your actual, right? Right? So, I'm saying ours is 29 point five percent.

KURT

2:03:06 Okay. What?

BRETT

2:03:08 We...

STEVEN

2:03:08 Should be able to increase that point.

KURT

2:03:10 I would also say that we do have a large component of fire life safety and those deficiencies are really not optional, right?

--- Quoting ---

STEVEN

2:03:16 This Mike.

KURT

2:03:18 Right, right. You can't be out of code. So, what we found is it's just more at bats that you need, right? More quotes. And what about that is what you, would, you know, then look down at is the quotes by technician? Why is Jimmy identifying 50 deficiencies which turn into quotes a month?

--- Quoting ends ---

KURT

2:03:46 And John is only doing 10. What are they? Right there? They're walking around very similar job sites similar boilers what, you know, put them in a room, right? And have them figure it out educate someone. So that's information that we're going to be visualizing also, which is pretty cool here.

--- Customer engagement ---

KURT

2:04:05 A lot of times our customers are every year, like the woman tax model, they're removing the bottom five percent of their customer base. They're paying, they have to deal with. They barely pay on time, right? We wanna use our resources to more profitable people, right? You wanna grow, you wanna go after those bigger accounts. And maybe at the current status, you can't service them. Or again, they're not worth it. So this is again just kind of... boost revenue dashboard. Miss something that you spoke about, that was very important, right? Marketing impressions per service. Are you clocking into a job? Are you adding any attachments to the job? So, are you completing appointments on time, right? Everything is the Amazon experience. When you order something, you default the Amazon because it's easy. It's efficient. It's quick, you know, the status of your order from when you press purchase to when it lands on your doorstep. So this is a visualization in terms of how you're connecting with your customer base.

--- Accounting ---

STEVEN

2:05:17 So, if you go into like for example, go off, are... you know, adding attachments to jobs and you click on that, can you?

KURT

2:05:29 Click on that?

STEVEN

2:05:29 Or no?

BRETT

2:05:36 You can export it to a CSV... but this is essentially pulling data from your service trade account. So it's taking you into the CSV that you would get out of service trade when we put it in quick sites, putting in all these graphs that is easily viewable by you guys. So you don't have to waste as much time as you're wasting in excel today.

--- Quoting ---

STEVEN

2:05:57 This gives you high level data, right? And like let's say you wanted to whatever drill down, then you would do an export to a CSV, correct? So, like if you go back to... the boost revenue dashboard... and you go to the quote percentage quote approval rate... and you export that... could I see that CSV?

--- Quoting ends ---

BRETT

2:06:44 Down on your bottom, right?

KURT

2:06:46 Can you see?

BRETT

2:06:47 It?

KURT

2:06:47 Not seeing it on my?

STEVEN

2:06:51 So it should.

SIMON

2:06:52 Set.

KURT

2:06:54 The date is there if you want, if you want a nuance and drill down further, you can do that. It's however you wanna do it... right? This is just basically... a sum of everything. If you want to go down further, you can go down as far as you want.

--- Quoting ---

STEVEN

2:07:13 I want to go to show me every single quote and the status of the quote, right? Whether it's approved, rejected, not approved out for the quote, whatever it might be.

KURT

2:07:25 We're...

BRETT

2:07:26 Yes.

KURT

2:07:27 The base data exists in the data warehouse, right? At a very... granular level, if you want to go down to that granular level, you can do that.

STEVEN

2:07:42 Okay.

STEVEN

2:07:47 Okay. All right. So, six PM.

KURT

2:07:51 Last thing I wanted to say was... as we were talking about quotes and efficiencies. So the verification status is that just because the technician has identified a deficiency, does not mean that that's... approved. Once the office accepts it and sends out a quote, then it turns into a verified status.

--- Quoting ends ---

KURT

2:08:17 And as a matter of fact, I was educating myself, this is you could log onto this is support at ServiceTrade. Dot com. Happy to send it to you, but I educated myself in five minutes kinda walking through.

KURT

2:08:34 The definitions new draft submitted, right? We got very granular. The one that I thought was very interesting... notify is again, the relationship with your customer notified is something it's not your line of business, right? But you might again building that report with them, say, hey, by the way, I, I'm not your fire life safety guy, but you might want to look at this because something doesn't look right, right?

--- Customer engagement ---

KURT

2:09:02 Again, a means to... further develop that relationship. And so that's pretty cool. You know, my boiler guys tell me something that my fire life safety guy should be, you know, tending to and that's our whole concept about providing a premium service, right? At that premium level service, you can charge a premium rate.

--- Customer engagement ends ---

KURT

2:09:22 And when the economy does go down if rates continue to go up and we actually have some formal recession in the first time in 17 years, right? And everybody starts running back to their service side because Construction is slowing down or case, you know, I wouldn't say case because I don't think we have another COVID, but the point being, is that relationship when someone says, you know, what we're gonna cut the competition by 20 percent, no way.

--- Customer engagement ---

KURT

2:09:47 I don't care how much I love my relationship with my customers, you know, you can undercut them by 50 percent. I still, I'm sticking with.

STEVEN

2:09:55 Right. Okay. So now that you've got to do your research for a couple of minutes... how do we see this in a consolidated way?

--- Customer engagement ends ---

KURT

2:10:07 You more and we'll very granular about that. So I think on.

STEVEN

2:10:12 A follow up, we'll get very granular. Okay? So, when should we do another call?

BRETT

2:10:23 Need two, three days to figure everything out. I plan on listing to this recording in the morning and figuring out solutions to everything that we couldn't give you today. I'm thinking.

STEVEN

2:10:36 Red, how long did you say four years?

BRETT

2:10:40 I've been here for about four years, yes.

STEVEN

2:10:41 Well out, man. What's two, three days are you gonna do for it?

BRETT

2:10:45 I gotta talk to my team to get the answer. I don't know... I'm looking at how's next week look for you Tuesday?

STEVEN

2:10:54 Tuesday is very busy. Monday or Wednesday are much better for me Monday, if that's...

BRETT

2:11:05 I could do Monday. Let me check for a.

STEVEN

2:11:07 I only okay for you?

SIMON

2:11:09 Yeah, I'm...

STEVEN

2:11:09 Good.

BRETT

2:11:12 Could you guys do a three PM on Monday?

STEVEN

2:11:17 I can sign?

SIMON

2:11:20 Good for me.

BRETT

2:11:21 Okay. I will send you both an invite. You want me to include Joe?

SIMON

2:11:27 Sure.

STEVEN

2:11:28 Yeah, that's...

SIMON

2:11:29 Fine. By the way, I'm curious like when other companies look, do these kinds of evaluations with you? Like how does that compare to what we're doing?

BRETT

2:11:41 I think with other companies, it's spread out across multiple meetings. Realistic. I'd rather have a longer meeting and cover more the way you guys are doing it, but I think we have more time. Kurt and I have more time to go talk to our solutions architects that know every answer. So we can go find that we don't get stumped as much.

SIMON

2:12:00 But in general, like I mean, are other companies asking the same kind of questions looking at the same kind of stuff or are they, you know, are we looking at things very different than the way that other companies evaluate the software?

BRETT

2:12:16 To a degree, I think you guys are looking at, you know, what is, what does this button do a little bit more than some companies we talked to, but there's also companies we speak to that are very similar to the conversation we had today. It's kinda hard to say. Yeah, but I think you guys are asking good questions.

KURT

2:12:33 Yeah, typically, right. People just wanna know that they're going to be able to do a certain workflow, the questions that are being specific from Steven, I think are okay. This is what I wanna do. How do I do it? And that's part of the onboarding process, right? Where you get very nuanced.

--- Purchase decision ends ---

KURT

2:12:52 So you're more detailed in my opinion than most conversations I have. I think the reality is that... the more refined, you know, service trade is, you know, it's the Ferrari out there and it can, right? Just those buttons alone means that you can be as detailed orientated as you can in terms of, you know, the status which, you know?

--- Purchase decision ---

SIMON

2:13:15 Yeah, no, I get it. I'm just curious and look, we're detailed, right? And we're you know, for better for worse, you know, we're detailed and this is a super important decision for us, you know, and like we kicked off, we're going through the intact thing, you know, and, you know, we gotta nail that, and then we got to nail this decision, but just out of curiosity.

--- Purchase decision ends ---

SIMON

2:13:37 So like, you know, on average, how many hours do you spend on the phone with customers before they get to? Yes, you know, for the people who go with service trade?

BRETT

2:13:49 I think it depends on the size of the company. Smaller companies are making decisions faster, companies of your size and stature. It's probably four to six weeks sales cycle. How many meetings we have on that depends on the company. Some people have looked at service straight in the past. They have a lot of background on it and it's quick. Sometimes people haven't like you guys. So you wanna know everything you wanna know, which I think is good because to your point, this is a massive overhaul for your guys company. You wanna make sure it works. So, I don't think it's easy to put a number on how many hours I spend with the typical company every.

SIMON

2:14:25 Just curious.

KURT

2:14:26 Yeah. The other thing I would say is that sometimes people are so stuck in the way they do things that, you know, they're like, well, I need it to be green. And if it's not green, I'm out and, you know, unfortunately, my personal opinion is those are the people at a loss, right? If they really grasp service trade and understand the power that it can provide for their needs, they can go as deep as they want.

SIMON

2:14:51 Okay. Yeah.

STEVEN

2:14:52 Brett, if you do have people who are your customers or, you know, like the California boiler people, I could just call them. I wasn't joking, but if you have someone in particular, you know, who might be willing to get on the phone... I'd be very interested to talk to somebody who's using it. If you don't have somebody within the boiler industry specifically, but, you know, I'm sure everybody's kinda using it for the same thing. The thing might say do this instead of clean boiler, but I would definitely want to speak to, you know, some people here, how their experiences with it.

BRETT

2:15:33 Yeah, I can definitely provide you with references. I'm thinking of someone specifically her, where's Johnson mellow located in Michigan.

KURT

2:15:42 I don't know I talk.

BRETT

2:15:44 Somewhere in the midwest, they do boiler work, but they also do H back. Would that be okay? I just want to give you something that's been using for like a year or two.

STEVEN

2:15:51 Yeah, that's fine.

BRETT

2:15:53 Okay. Let me give, I'll give him a call in the morning just to make sure he's good that there shouldn't be any competition because you guys are so far apart. He will very likely say yes. So once I get a yes, I'll send you this information and you can go from there. Also gonna send you guys an invite for Monday, the twentieth three PM, so I can, Kurt and I can provide you with answers to everything we couldn't answer.

STEVEN

2:16:14 Okay. Fine. So let's just maybe tomorrow Brett, after you watch the recording, you could send out like maybe a little mini agenda, you know, we know for sure. We wanna look into like the high level reporting of like the quotes and the statuses and things like that. Let me send you right now in.

SIMON

2:16:39 Well, and obvious.

STEVEN

2:16:42 Sly, nothing we sent you get shared with anybody. Would that be accurate?

BRETT

2:16:46 That is correct?

KURT

2:16:48 Okay.

BRETT

2:16:49 Would you let me share it with my internal solutions architects to finances for you? Is that okay?

--- Accounting ---

STEVEN

2:16:56 Yeah. As long as they don't share it with anybody external because we're sending you like lists of our service contracts and customers and a lot of information.

BRETT

2:17:08 And I think that's another important point. If you guys go with service trade, we do not own your data. You at every point of the process, own your data, we simply host it... in ServiceTrade.

STEVEN

2:17:31 As an excel and I'm gonna send this to you.

STEVEN

2:17:43 Right. Like a lot of what we're doing right now is in excel. So I would urge you to review the excel that I sent, review the excel that I sent and Simon, I think maybe we should we send them the KPI... or?

--- Implementation and ongoing support ---

SIMON

2:18:02 We could, I mean, that's a dashboard that we're gonna throw on top of everything.

STEVEN

2:18:08 Maybe you guys can do this also on the next meeting, talk to us a little bit more about like the implementation, what that looks like, what the ongoing support looks like. You know, I can tell you for build apps just, you know, who's the other people we're talking to right now, you know, included in the software, you get ongoing support. So if we want to come up with a new report or we hire a new person, you know, all of that condom is included, just kinda walk us through because obviously, you guys know this better than we do. The implementation is very important. It's very difficult. You gotta get a lot of people involved.

--- Implementation and ongoing support ends ---

STEVEN

2:18:43 The ongoing support is important. You guys come out with new feature updates and blah, blah, blah, we have new people who come in lead et cetera. So maybe you talk a little bit about that... Simon, anything else in particular that you would want to have covered?

SIMON

2:19:07 I'm just curious what we talked a little bit earlier about time capture solutions, which time captures solutions your clients work with?

--- Tech time tracking ---

BRETT

2:19:19 And do you mean like... what do?

SIMON

2:19:24 Payroll companies? I mean, are all of your companies using service trade for time capture or are some of them using, you know, your solutions? If they are more complicated, like using like an HH2 or?

KURT

2:19:40 Brett, how would you show them a time card?

SIMON

2:19:43 Time code is?

KURT

2:19:45 Code it's based?

SIMON

2:19:47 It's...

KURT

2:19:48 It's a module. It's extremely cheap, but it enables the tech to review their time card for the week, whether right there, time off, for lunch time, whatever it is and submit it to their manager. All that information then would push over to at.

--- Tech time tracking ends ---

SIMON

2:20:06 Okay. So let's go through next week on the.

BRETT

2:20:12 And just to confirm, Steve, you want me to send you an end once I listen to call, figure everything out, you want me to send you an agenda of what we plan for Monday's call?

STEVEN

2:20:21 Yeah, yeah. It doesn't have to be detailed at all like don't make it pretty, just slap two sentences together. I just wanna make sure that we're spending our time use fully together so we can review it. And then if there's anything else that we think of, we can just add to it. So we don't get on and then just go in random directions for stuff that we don't necessarily need to be investigating at this juncture.

BRETT

2:20:43 Yeah, that sounds good. I know there's at least five things that Kurt and I couldn't answer today, so that's going to be the big focus. But as well as the things we mentioned today, so time card implementation and ongoing support, anything else that comes to mind, I'll include it tomorrow for you?

STEVEN

2:20:56 I appreciate it guys.

BRETT

2:20:59 Absolutely. You guys have really good questions on a sec and I know you want to be detailed in this and we appreciate it. If I was in your shoes, I would do the same thing.

STEVEN

2:21:07 Yeah, if...

BRETT

2:21:07 You need anything.

STEVEN

2:21:09 This is huge for us.

--- Paper process ---

BRETT

2:21:11 Exactly. And sometimes, you know, we get away from that. We work at service all the time and it's like it's not that we don't understand your business, but if we're not in every single day.

STEVEN

2:21:23 There's nuances like, you know, and everyone, I'm sure every boiler company runs it a little bit different, right? And for some people, it's probably like listen every deficiency that comes in and gets a quote out. So I don't really need to track it for us. Maybe it's who we have in our office. I don't know. But every deficiency that comes in doesn't necessarily get a quote and I've seen a lot of things slip through the cracks and we wanna make sure the things don't slip through the cracks because that's you know, that's money slipping through the cracks.

--- Paper process ends ---

BRETT

2:21:50 Yep, I got it.

STEVEN

2:21:51 But, okay, all right. I appreciate you guys time and we shall reconvene on Monday.

BRETT

2:21:58 Awesome. You guys have a good weekend and we'll talk to you then.

STEVEN

2:22:00 All right. Thank you.

BRETT

2:22:02 Take care.

The End