



ServiceTrade Demo with HVH Mechanical Partners llc

Chelsea Payne with HVH Mechanical Partners
Recorded on 3/19/21 via Zoom, 47 min.

Participants

SERVICETRADE

Chelsea Payne
Territory Manager

Maribeth Steffen
Field Manager

Katherine Holden
SDR

HVH MECHANICAL PARTNERS

Mike Tedesco
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Transcript

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

CHELSEA

0:00 Hi, I can hear you just fine. Sorry, I was thinking issue connecting to the audio... does, okay?

CHELSEA

0:25 Have you bought feel about the one we did this morning?

CHELSEA

0:36 I have a feeling he's probably gonna.

MARIBETH

0:38 Back on.

MIKE

0:38 Tuesday, and...

CHELSEA

0:39 Say, hey, nice to see some more stuff. I think we should.

MIKE

0:44 Would be prepared to like show them how to set up a customer instead of the service.

CHELSEA

0:56 I mean, he is looking at Salesforce, which is pretty expensive and it's...

MIKE

1:01 The long implementation.

CHELSEA

1:03 So, I think that works in our favor.

MIKE

1:09 I guess I have some concerns that he was like.

CHELSEA

1:11 For a CRM system, but...

MIKE

1:16 No, I think that he, I think he feels good about.

CHELSEA

1:19 I think we set the right expectation with that and we set the right expectation with construction. So, yeah... agreed. And since he wants to get up and running quickly and.

MIKE

1:32 It's...

MARIBETH

1:32 Obviously.

CHELSEA

1:33 And our then?

MIKE

1:35 That he already has.

CHELSEA

1:37 Someone...

MIKE

1:37 There's business that is a previous.

CHELSEA

1:39 Show you the user.

MIKE

1:40 So...

MARIBETH

1:41 That's...

MIKE

1:42 That's all good.

CHELSEA

1:50 Yeah, I don't know. How do you feel? Yeah, I feel like, yeah, they, he'll probably have some more questions, you know, when talking to him. I'm sure that they're gonna wanna make sure more information about the Quickbooks. So I'll make sure I'm going to send that in the recap email.

CHELSEA

2:14 That way Scipio, maybe that'll help you. I think we'll definitely have some more questions, but yeah, he was looking at Salesforce me. So that was like holy moly, that's expensive.

MIKE

2:23 That's way too heavy for... for.

CHELSEA

2:26 Them...

CHELSEA

2:43 So, what was the deal with big country, the timing?

MIKE

2:45 Just bad when Charlie.

CHELSEA

2:47 Talk to him or?

MIKE

2:48 Like a...

CHELSEA

2:48 Middle COVID or something. I just couldn't have timing at the time. It was kind have, you know, they just, it would like be nice but it wasn't an absolutely necessary kinds of thing. And he said now he's like, you know, are... are we could do a lot more work. We just, you know, we've grown from the last time and the system we have in place just like we can't keep going the way that we're going. And so, you know, like break it down asking different like multiple different times of the differences or how will this affect to you and yadda... yadda on different stuff. And so, yeah, at the end because it, you know, he, I'd asked what brought competition and, you know, he just like he doesn't wanna look at anything else. Like he's already kinda look I was showing her. And so I just went into at the end is like you? Okay? So what was your favorite part? And the bringing the value up again? Just like is this something you wanna move forward with today? And so they started to asking me about you payments and stuff like that. That's I had, you know, Laura hop on. But yeah, I had everything set and ready to go. And then, so she like confirmed with them and started creating the contract. Yeah.

CHELSEA

4:12 Make sure I have all my notes in for Florida mechanical second, go ahead and.

CHELSEA

4:20 Met with it was I'm Kenny. So he's the... the new GM. He's only been there three weeks... and he was just precious... today and he had really good questions here. So you would just making sure it wanna make sure but how, you know, the... the text will get trained and that, you know, that... that would actually be good training and not something to where like the tax aren't gonna know what to do. Ask a few like particular questions of how some things work or like the exporting of information. I'm just kinda like covering his basis. But then like, yeah, we didn't even know like talk about like negotiating price.

MIKE

5:08 For the split.

CHELSEA

5:09 Payments, but the split payments up for the one, I just it, but this morning for Florida mechanical, right? Right? The only thing about payments was, how do you want to pay? Do you wanna pay credit card? Do you wanna pay a CH? And that was it. And...

MARIBETH

5:26 Hello?

MIKE

5:26 Right.

CHELSEA

5:26 About the Computerease connector, so obviously that...

MIKE

5:29 Changed in.

MARIBETH

5:30 With the...

MIKE

5:30 Outside sales team just doesn't notified about it.

CHELSEA

5:33 So, yeah, she told me that because she had to talk to Tim and she said it's just me. I was like, well, now, we all know, I mean... now, we all know to, you know, to move on from there. Yeah. Actually, can you send me what she sent you about the portal to? Because definitely.

MARIBETH

5:53 Sales site and I just wanna.

MIKE

5:55 On that by Aaron Tim?

CHELSEA

5:59 Yeah. Yeah. I'll scroll back through my chat with her and for whatever chat she had because it was confusing up. Is it? Well, I can either search by the way, you don't have to scroll through, you can actually start not the panel. Yeah. Yeah, I'll do that. Okay. I see. So, yeah, for... for mechanical the clothes want it. Yeah, I see my notes from the demo that we did. There was no other information of what they like, I needed to know now. So, yep. Alright. Let me go ahead and close one of them. Yeah. Yeah.

CHELSEA

6:52 No, you got the coal way. He's looking for the link. Hold on. Did you get a chance?

MARIBETH

7:01 He emailed me back?

CHELSEA

7:04 You want me to email the link? I'm on an eye on it? Okay?

CHELSEA

9:06 Good morning. Because she'll be like snap hearing aids. Should be a sleep. I don't like remember, she's up here and then it's just every now and then she'll kinda wake up and then just start cry now. Like what is, and she comes in snuggles. Yeah.

CHELSEA

9:46 I mean, yeah, of course, I'll take notes during the demo for sure... because you said?

MIKE

9:54 Over to Laura for the other.

CHELSEA

9:55 One... for the one we did this morning. Yeah. No. Is that one ready for quote?

MIKE

10:07 Review it, I think so.

CHELSEA

10:09 Okay. I'm gonna admit him in right now then I'll look at that and send that over. Alright, cool.

CHELSEA

10:22 Hey.

MARIBETH

10:22 Mike.

MARIBETH

10:29 Hey, Mike, can you hear me?

CHELSEA

10:30 Yes, I can.

MIKE

10:30 Hear you guys. Can you hear me?

MARIBETH

10:32 I can. Now, how are you doing today? Thanks. My name's Mary that's on the field territory manager for the southeast and we also have Chelsea, she's the inside territory manager. Thanks for taking time out of your day today, if anyone else gonna be joining?

--- Call Setup ends ---

CHELSEA

10:51 On your end, just.

MIKE

10:52 Me, I'm doing a little initial evaluation.

MARIBETH

10:56 Okay. Alright, perfect. So our plan today is just to kinda get a better understanding of your business, what you guys are looking for. If you guys are looking to make a transition off of, I think they're using option right now. We'll give you a little background about service, trade will do a high level demonstration of the product. And then if at all kind of looks good, then we'll talk about the... the best next steps for you. How does that sound?

MIKE

11:20 Sounds good?

MARIBETH

11:21 All right. I can't help but ask, I know we connected on LinkedIn prior to the meeting. Are you from Utah? I saw you went to suny?

--- *Small Talk* ---

MIKE

11:30 I'm from New Jersey by, yeah, went to you to go to college.

MARIBETH

11:33 I grew up there. So I was... I was curious. I am, yeah, I grew up in need of fast. So it looks like they're about the same needs as me and I was thinking my gosh to be sort of like elementary or junior high school.

MIKE

11:47 It was fun. I don't know. I've never lived there now for sure but.

MARIBETH

11:53 Yeah.

MIKE

11:56 Where are you? Like an end the cat or like... trying to think of what else is on that area?

MARIBETH

12:03 Yeah. Yeah. I saw that he was, I heard from our college. No, I've I went to, I went to elementary school in Utica, and I went to junior high, new hartford. And then one of the full, I moved to North Carolina. Yeah, my mom still lives up there, but yeah, she actually was like, how about you come up in August? I think everything will be like can get them like... but anyhow, so I was just curious about that since I thought on your LinkedIn.

--- *Small Talk ends* ---

MARIBETH

12:33 So, so I just kinda wanted to get a better understanding. I know that you and Catherine would kinda corresponded over email and that you guys weren't actually able to connect on the phone. So maybe you could kinda just give us like a broad overview of what you guys are currently doing.

--- *Pricing* ---

12:49 I did see obviously you guys are doing commercial H back and... and plumbing services. It looks like you guys do service, preventative maintenance and... and maybe some installing construction as well.

MIKE

13:03 Were so high level. We're you know, we're a small business. You know, we're doing less than 10,000,000 a year, probably closer to 12 to 15 employees. Feel good. About 13 technicians, three account managers, three... it's office personnel, including myself an operations manager who kind of... overseas... overseas all the technicians. So, so we got about 20 people overall. We're using up, see it's sort of an antiquated system at this point. I think it had a good. It was functional at the time when they implemented it back in early 2019. I haven't been on it too long which is good there's not a ton of data that we need to extract that. But just like the, you know, we just start serve that really kinda I'll pick our coverage, you know, 75 percent of our businesses, somebody Kong and they have a problem fix it, you know, 20 percent, you know, 15, 20 percent would be PM work or service agreement work where we have an annual contract. We might visit quarterly. We might visit monthly. We might not visited at all, but we're building the monthly and visiting quarterly which the system gets very... very confused when we do stuff like that. So we don't really know for winning or losing a lot of meat and stuff we're doing which is sort of an issue. So we think we're missing the boat or possibly even missing on billing... billing opportunities. And any other five to 10 percent would be quoted work, quoted contract work where we're doing something a little bit more major than just your typical service stuff where our guys might be on the job, two or three two, three jobs in the day. Most of our jobs probably there on it to... to three times, you know, two, three days during the week and around for the next. But then you have some of your contract work we might be doing, you know, like replace and cooling towers or doing some lips. And... and that requires maybe several weeks of us to focus resources on so little bit of a mix. And then in that same thing we're plumbing, you know, we're starting involved in the plumbing side... and a lot of it is just in all various places. We're constantly moving paperwork and, you know, creating proposals and boom into Dropbox and scanning them and doing this and that. And it's just... it's functional team has done a great job and trying to keep up with it. But in my view, one of the reasons I came in here was to find ways to own that process for us to really work smarter, not harder. So we continue to grow and keep our office staff relatively the same to be able to support and really the growing up anything should be in the field. We should be added technicians to be able take on more work, right? So ideally that's kind of where we're at small business. Like I said, so less than 10,000,000, no. So, so cost is of importance is not the only important thing, but it's important that we're not siphoning a bunch of money off the top, just the upward software, right?

--- Pricing ends ---

MIKE

16:17 So, you know, like your ServiceTitan in your FieldEdge is and those guys out there, you know, it's great systems are probably more geared toward residential than we are, but, you know, come with a license fee per tack and there, and it's... it's pretty... it's pretty high, right? So... so trying to look for something more middle of the road right now. I'd say we're looking at you guys. We've gone through several demos with BuildOps. There's. Another company called stripe in that we looked at and another company called come to shop. So trying to narrow it down to my top two

or three. I will be honest with you. I've probably demos at least 12 or more. So some of that's kind of blends in together, right? So it's really trying to pick apart what systems can and can't do. And the good thing is... is, as I've gotten into this a bit more right off the bat exactly and conversations pretty quickly if I feel like it's just, it's not the system's gonna do what we do now plus a lot more if we can't do the simple stuff that we do. Now. That makes no sense. Like, so for me, you know, some of the, some of the must haves for us... is really... you know, being able to generate a po on the fly right off their mobile app, you know, because, you know, like I said, we're a service. I don't wanna have to supply house waiting to get somebody on the phone dispatch to issue a po is et cetera. So being able to issued feels and apply for themselves for the job at the wrong, easy access for them to see what job they're going to each day, what's the location who's the, is there, you know, a certain location with this equipment is cool features that we just don't have right now, the ability to take photos and scan equipment, you know, I think for especially on preventive maintenance piece. Once we get no serial numbers and pictures of... of units in the system to be nice if we can create a barcode for them so that when the technician is on site, you can scan and he can see what belts, what filters B to B use, what was touched the last time they were there, touched in the last time there, I think it's just helpful for them. But it's also very helpful tool for us to keep our foot in the door with our customers because now we've are compiling all the data on their equipment on our barcode, right? So nobody else can come in and scan it and get the same information. So it's another way to continue to not just broaden our customer base and make things easy but also retain a customer, right? So, so really, and that's kind of where the mobile pieces just making it a very simple process for the guys in the field more click throughs and things they have to do more opportunity there is for human error which we're trying to avoid, right? So we're just able to tag equipment, being able to issue, being able two o'clock your time efficiently within on, yeah, because right now it's another pain point is the guys are, you know, we're so non... come middle to ops team because guys are putting the time and it's not always fox correctly. So they have to clock their time and obviously, and then they're also sending them time sheets at the end of the week for us to prove or proof... proof read and... and confirm that their time sheets that they have actually match what's an app see before we go push in adp for payroll processing. So being able to have that information in one spot, being able to have open integration with eight, which is a good partner of ours on the payroll side. And our HR side, we use adp total source. So we're doing a lot of automation there through the app and then also having the ability to integrate with Quickbooks. And that's what we use our financial information for right now. So being able to push information in there. If it was two way great right now, it is one way to appropriate. But I, those are really the two other software programs that we really utilize. And I don't see is moving away from anytime soon. So trying to make the ease of implementation integration would have to be able to be... be able to talk to those otherwise. It's probably not the best fit for us right now just because if... if you'd be looking to change way too much too fast especially with us now staring April and face, you know, our busy season may June, July and August. So I don't want to have too much going on at one time.

MARIBETH

20:58 Yeah, yeah. I understand that. So it sounds like clearly you've done this before... because this is a really great overview of your business. So it sounds like kind of the main things that you're looking to accomplish is reduce the administrative burden. Like you said, we want to grow our organization, but that's adding technicians in the field who are out there going and getting more money for you guys, not the administrative side of your business, which is just additional overhead. Of course, they're valuable, but in the end, it's... it's additional overhead, a better mobile

experience for the technician out in the field, and then kind of consolidating those processes into one centralized location so that you can have easier access and visibility for everyone. Does that sound right?

MIKE

21:48 No, no.

CHELSEA

21:49 I usually for the.

MIKE

21:50 And then in, internally, no, it's easy for us to be alerted on, you know, like a nice clean dashboard as far as, hey, what's my open, I am look like what's the, what's are over 90 days? Looks like what... what jobs are winning with jobs or lose, what's been invoice. What sales guys are doing, you know, producing the most, what technician KPI'S, can we measure through? You know, the through the data, you know, really a high level stuff that we just don't have access to without me physically going in there, pulling it into an excel, running pivot tables and extracting information that I need. That's kind of what I've been doing the last two and a half months that I've been here and it's fine. I could do is just, I know that the systems out there that can do it for. So we just again, we're working way... way harder than we should be to extract information from there right now.

MARIBETH

22:42 Okay. Okay. And you had mentioned, you know, obviously, you know, we... we work with companies from, you know, five pets too. I think our largest customer has about 400 out in the field we work with in your area. You might be familiar with BMW mechanical and tech, Joe Powell mechanical. They're all customers of ours. I'm not sure if you work alongside or compete with any of those guys, but yeah, we certainly have some... some better ways for you guys to manipulate and create reporting. In terms of a... of a budget. What... what have you guys established for this project?

MIKE

23:23 Trying to stay between a 1,000 or 2000 a month.

MARIBETH

23:28 Okay. Okay. So yeah, I mean Chelsea... Chelsea just, we just got off a meeting and she said, hey, you know, software works properly for you at the end of the day, it's gonna cost you a dime and should be obviously streamlining your process has been helping you guys make more money and that's exactly what service trade is trying to do. So that's... that's all a really good place to start. Let me give me just a little bit of background about... about who we are. And then we'll kind of have all into the product demonstration and we can talk about most of these things. And we do have a Quickbooks integration. I don't have a sandbox Quickbooks capital. We can kind of get up to the point where you send all this information over to Quickbooks, but I think most of this other stuff is all things that we're going to, able to help you accomplish in a little bit more. And you guys can see my screen. Yes. Okay, perfect.

So as I mentioned, yeah, we're... we're specifically designed for commercial and industrial service providers. In your right, ServiceTitan is a great technology but they're really not built for, you know, what you guys do. We want to help you guys at the end of the day, take your service business and turn it into a customer service business. We've heard from your peers in the industry that it can be difficult to compete with low price competitors. You mentioned, hey, we want to retain as many customers as possible. And we want to go out and get more new customers. And the way that we help you guys do that is by leveraging technology. So we've taken choose from customer or from companies like Amazon or even dominoes with their pizza tracker that provide updates throughout the whole service. They can send pictures to the customer audio, and then those video memos provide that Rich information to your customers that they have a better understanding of the value of the services that you guys provide. And by leveraging this technology, what it's doing is helping service trade deliver on our customer, a promise of helping us be more valuable to your customers, so that you can grow your business in a scaleable way. And there's several different ways that we help you guys accomplish that. So we mentioned, you know, the customer experience. So we wanna make sure that you guys are building your brand, getting your logo, your brand, your communication in front of your customer in an easy and convenient way. So we have an in route notification and then you can send to your customer. When your technician is on the way with a picture, a description of the service and estimated arrival time. We also have interactive online quotes to your customers, can see pictures, photos, audio memos, videos of what's going on with our system, if it's a repair, or if you have your account managers or sales team going out and putting a PM contract, they can do a walkthrough of the building and they can snap a picture of each of the units. And then your customer can easily just take action by approving or requesting changes online. You mentioned something about proposals. It sounds like that might be a little bit of one of those processes that's taking a lot of stats. Are you doing that within the app see platform or is that one of those processes is that you're having to go outside to complete?

MIKE

26:34 It's a mixture of both. I can tell you right now, we typically will create the quote or estimate, you know, word document that's branded with our stuff and send it to the customer. It's not done democracy typically. And you can't do and we've tried it a couple of times but it's just their documentation and lack there of... of customization. Was just so bad. We'd rather it look more professional and send it externally.

MARIBETH

26:59 Okay, cool. Then I think... I think you're gonna, I think you're gonna like what you see inside of service trade is one of the... the kind of core aspects of our platform because we want to ensure that you guys are capitalizing on all of that potential pull through revenue, that you're sending quotes out in a timely manner that you have an easy way to track the status of those quotes and that you can easily take an approved quote and turn it into billable work. We also have a really nice post service report. We call that a service link. It's gonna kind have Thai everything up in a nice pretty bow. So your customer exactly what happened with their service, whether it's a PM or, you know, an emergency reactive call, you can provide any paperwork documentation like if you have a PM checklist or something like that you... that you want to pass along, you can. And then we'll let them know about any potential repairs that were found that needs to be active on as well. We have a customer service portal. So this is something that typically customers your size are taking advantage of. So it's an add on to your website. You can use this as a way to upsell

your customer, but they can easily go on access to their information about the locations that their contacts as they'll see any work history and the upcoming jobs, any quote they'll see all of their equipment of each of their locations. And they also have the ability to request service as well. Is there anything that you have any customers time of requesting? Or have you guys thought about maybe giving your way, giving your customers a way to access this information online?

MIKE

28:36 Yeah, we saw that. You definitely don't have a way to do it now. But yes, compensate is having an open forum for them.

MARIBETH

28:43 Okay. Alright, cool.

CHELSEA

28:45 And then...

MARIBETH

28:46 Lastly, we do wanna make it really easy for your customers to pay you. So one thing that our customers have requested was an online payment option. They're trying to pull in their accounts receivable and get their customers to pay as quickly as possible. So this is a somewhat of a new feature inside of service trade. You have the ability to send an invoice, they can pay with a credit card or a CH payment online. They can also view all of their service details and kind of leave comments with you as well.

--- Pricing ---

MARIBETH

29:18 So all of that kind have taken into consideration is helping our customers to drive their revenue on average by 23 point four percent each year. So, you had mentioned that you guys are doing about 10,000,000 annually right now. You're looking to do about 12 to 13. So we're gonna kinda fall right in there. Additionally, we definitely have customers who are... who are outperforming that. So right now, in terms of how you guys are planning to achieve that 30 percent growth in your company, what are some of the things that you've thought about implementing for the 420 21?

MIKE

29:56 More work? Okay?

MARIBETH

30:00 Yeah. I saw that the owners are also account manager.

MIKE

30:03 You guys.

MARIBETH

30:03 Must be a real sales focused organization and that sort of thing.

MIKE

30:07 So we have three account managers. Two of them are owners. You have one ops manager who's managing the 13 technicians that right now soon to be probably like 15 next month or two. And then you have myself who's kind of overseeing all of the logistics operations. And I have two two direct reports right now. Ideally, I would like to have... one more one more report by the end of this year, that would really focus more on computer technology, help with the reporting, help with phones and I pads and things of that nature. Somebody who's a little bit more technical than I am. Would be, it'll be nice to have somebody here that can do that kind of stuff. So.

MARIBETH

30:53 Okay. Alright. Yeah, that, that's... that's great. So where I kinda wanna start today is the customer portal. Since you mentioned that you have some customers who are requesting that and that's something that you guys have thought about implementing in your business, but don't necessarily have a great way to do it. So this is just kind of our example portal. RFP, customer names are bark service. So this is obviously going to be branded with the HVH branding and logo. They'll be a place on your website where your customer can log in. This is something that they have to request. So this view again, most of our customers kind of have like a gold silver... silver gold platinum kind of package and they only offer it to those platinum level customers. So what they'll be able to see is any jobs that they have going on today, any upcoming jobs, they can see work history as well.

--- Pricing ends ---

MARIBETH

31:44 So if they click on, I mean these... these job numbers, it's gonna take them to what we call the service link is that post service report. We can see all of our floats which will show you the whole quote process as well inside of the application, but they can access all of their quotes here. And they have the ability to either approve or what request changes. We've got some pictures, terms and conditions, things like that. So they have a pretty clear understanding of what's going on and then under locations and assets. We're going to be working at happens drive today. So once I click on the location, we're going to see all of the equipment that we have listed here, as well as all of the full service history that's ever happened at the site. So what your customers can do is they don't necessarily have to call the office now, they can just indicate, hey, look, we have something going on here. Oops... you'll notice service line. And then since you guys are doing H back and plumbing, and you're doing some refrigeration too?

MIKE

32:46 Not really. I mean... I mean we do curious Adrian here and there... but that, and that would be another thing too is being able to... to track consumable as being purchased for the guys. I mean, obviously refrigerant has skyrocketed materials are all over the place, having an easy system to make sure we're building up correctly as well to be very helpful. I will, hey, Mary, Beth, just so you know, I... I know most of this delays on me. I do have a hard stop at two, wherever we drop off. Let's try to pick

up either Monday or Tuesday. Yeah. So I'll let you do your... your overview, but I would say definitely probably want another follow up where we can focus. My focus would be on the mobile side, like what it looks like from the text side.

--- Call Setup ---

MARIBETH

33:36 That's what we're going to get to you.

MIKE

33:37 Okay.

MARIBETH

33:38 Yep. And it looks like... I could do Monday at two 30. Sorry, I could do Monday at three 30 if that works for you and I can send a calendar invite and this is all done.

MIKE

33:52 Out of the office by 10 30. So I could... I could do... Tuesday. I'm I usually work till like five, so.

MARIBETH

34:04 I could do Tuesday at eight 30 or 11 30.

MIKE

34:09 You do Tuesday 30?

MIKE

34:17 Two 30 or what... what was the other one?

MARIBETH

34:19 11 30?

MIKE

34:21 I could do 11.

MARIBETH

34:22 11 30. Okay. So I'll just go ahead and block it on my calendar. And then once this is all said and done, I'll shoot you a calendar invite and we can pick up wherever we left off.

--- Call Setup ends ---

MIKE

MARIBETH

34:32 No, no, no, that's totally okay. I know you guys finance can be passed. So, so what's your customer can do is Bill in. I know you said about 75 percent of what you guys do is reactive work so they can request service right here on the customer portal. And then what's going to happen is a notification is going to be sent to the office. And you're gonna see this information in a couple of different places. So the first is the way that we structure and organize all of your data, is we have your company at the top of your hierarchy. In this case, that's wake county public school system, and then each location that you service under that company umbrella because you guys are doing commercial service. You obviously have customers that have multiple sites. So we're gonna see this rate on the location page. We have this job right here. But what will all, where we'll also see this is on our dashboard. When you log in to service trade. This is going to be your landing page. This is gonna kinda give you a good overview of what you guys need to prioritize what you need to take action on right now. So you have your daily schedule, any overdo jobs. And then you're jobs without appointments that are doing the next week, that service request is gonna pop up right here. So we have it scheduled it, but we can easily do that. I'm just gonna add myself as a technician, and then we'll move over to the mobile application. So we'll say that we need to get out there today. Alright. So then once I go over to the mobile app, anything that you are, make any changes that you're making same day your technician is gonna get a notification and their appointments left is gonna update. So we're a cloud based system. All this information is going to communicate from the field to the office and vice versa. In real time. What's that?

MIKE

36:22 It's two way, right? So you're pushing data and the, and you're pulling the?

MARIBETH

36:27 Yeah, yeah. I mean, yes, it's so whatever the technician enters in the field, you'll see in the office in real time and vice versa. Yup. So what I can do is I'm gonna, this is our mobile application. So your technician can work on iOS or android. I'm on a tablet. They can be on the phone. The first thing I'll point out is there's a couple of different options for your clock event. They can clock in for job prep. It, they have to go by the warehouse to begin with or the office, would they have to go by the vendor? They can clock in... in route and I can notify the customer of that. So I can send you an in rep notification like we talked about earlier with a picture and I go ahead and clock in that way. And then once I arrive on site, I'll just go ahead and clock in onsite. All of these poc events are being logged and you'll see a total time on the work order back in the office. And you can also see this on a couple of different reporting options. So under the service, this is gonna be the description of the work. Now, this is what the customer entered. You guys can change this before your technician actually goes out to have a more kind of comprehensive description. Any comments that might be access gate codes, they can be internal comments that you only see within your business, or they can be public comments that are visible to the customers. You guys kinda get to designate that deficiency is the time that we use for any type of repair that your technician document. So this is going to be the first snapshot of work history that they see out in the field. It looks like we have several open repairs out here, but let's go ahead and add a new one. And I'll show you what this looks like. So we'll say that there's a broken compressor on the system and they can talk to text here if they want. They don't need to be super descriptive because

they can pass information both to your office and your customer. With the photos. We can take a video demo. I can record an.

CHELSEA

38:27 Memo.

MARIBETH

38:27 If this compressors making some type of weird wonky noise or you can use this just the kind of communicate with the office. Hey, here's the parts that are needed. This is how long the repair my teeth? So I'm gonna mark this as an in operable deficiency. And then I'm gonna tied to the specific piece of equipment or the asset that we're working on today, which is just rooftop they can unit. So this history is gonna fall not only on the job or the work quarter that we're on fifth. It'll fall in the location page as well as on the piece of equipment itself. So here's our list of service lines again so that you guys can segment your work for what you're pulling for plumbing and what you're doing for each fact, see that you can kind of see those performance metrics like you talked about. And then I'll mark this as a new deficiency and you can put in a proposed solution or your technician logistics this back. What happens from here is your office is gonna get a notification that says, hey, we have a need in the operable deficiency that's been reported at the broken compressor. It's an operable. It's something big and we probably should get a quote out for it. So this is the work quarter back in the office. And I can see under this deficiencies have again, everything happens in real time. The email that you can get that you can send back to the office is going to be this deficiency details page. It's gonna have the location, the unit, the job it's associated with the technician who's reporting it. Of course, we'll give you all of that deficiency history and repair history and related repairs that previously happened. So that, you know, you're always making the best addition to your customer and we'll pass this attachment oversight. Everyone in the office has a really good idea of what's happening once it's time to, once we reviewed... reviewed this and it's time to make a quote. We can easily start building one out. We have the option for quote template. So any common her parents that you guys are performing, you can get a quote template into service trade. So we'll say we are gonna replace this compressor. This is all configured for your business, whatever description you want to choose. We'll take your items list. You mentioned the consumable, you're going to give us your items list, your standard costs will get all of that information into service trade. Once we add this, you can see, okay, we've got all of our coffee here. Our pricing is auto calculate based on the pricing contract that you have designated for this customer location or service. So obviously you guys are negotiating different pricing dependent on probably the volume of work, the size of the customer, things like that, your relationship. So you can dictate the... the specific markup rules that you've negotiated based on this pricing contract. You can also choose the level of detail that your customer's going to see this quote as well as the gross margin before you guys send this off to your, so that you have a really great idea of what you're making before your customer ever sees us. So once I send this over, I can indicate which attachments I want to send. I'm gonna drop a copy of this over to you, Mike, but I can go ahead and pull it up on my screen as well. I know I'm going so fast you, this that you guys coming out in me and I'm talking to... but this is what it's gonna look like. If you have access to your email, go ahead and pull it up and you can kind of view it from a customer standpoint. It'll say you have a new quote from hard bark service. You do, you wouldn't respond if you want to request changes, you have the ability to do that. If you want to approve, you can your customer's going to have the ability to put in a purchase order number, you have to check that. Yeah, yeah. And you can actually

require that. So if you know, your customer has to provide that, they can actually if we have the quote unless you, unless they put that, if that's something that you require, it's configured for you. And then you can hit approve. And so it looks like you've viewed it.

MARIBETH

42:36 So if you wanna hit approve and I'll show you what that looks like. But I can also approve it from the office. We do give you a digital trail of everything that's happened on this well, who compiled it, who sent it on the customer side, we date and time stamp it with an IP address when they view approve or respond to the quote. So you have the ability to do that. Alright. So see you approved it with a purchase order number. So once I refresh this... this quote is going to go from the submitted... submitted status to approved. And then we can easily create a new work order, or we can add this to a job that exist. If it's one of those jobs that you're sending to the three days out at, you can just add it to the... to the next day and your tech can fix that the next time that they're out there. And then I know you gotta go. But the last thing I want to kinda point out is, you know, the ability to have oversight of all of these quotes. So I suspect that if you're sending them out of word and you're sending them as a PDF, that a couple of things are happening, your customers either maybe emailing you that it's approved, they might even be printing it, signing it, scanning it and refunding it. And then are you tracking that in an excel spreadsheet or how do you keep track of all of those quotes?

MIKE

43:56 Drop them a Dropbox... and then it's... it's forward into our admin department to create a work order for.

MARIBETH

44:05 Okay.

MIKE

44:06 Rate? We're not tracking conversion of estimates which to me that's what this would be able to view and it will eliminate a lot of heartache on our end. But also, I think your customers then to just prove it, we can get a copy. He gets caught. Her, she gets a copy and we can automatically generate a work order from the approval.

MARIBETH

44:26 Yep. That's exactly right. And the...

CHELSEA

44:28 And track the.

MARIBETH

44:28 Status of all of your quotes, and you can drill down by a specific sales person, a specific job type, a specific customer location, date range. You can see plumbing VS H back. And then you have the ability to resend bulk, resend all of these quotes or you can send them one by one with a personalized note. So in terms of kind of the

overview of this process, how... how valuable do you think this could being compared too?

MIKE

44:58 I could support?

MARIBETH

44:59 Okay. Alright. Do you think that it's kind of an improvement to being so like the way that you guys are tracking it right now and... and not the.

MIKE

45:08 It's not a knock against you guys, but anything is an improvement from what we have. No. But realistically now this is kind of falls in line exactly with the automation and the trailing and open integration and just eliminating steps, which is kind of what we're looking to focus on. So now this is definitely a step in the right direction for sure.

MARIBETH

45:31 Alright. Alright. Awesome. Well, I know you gotta hop off. I'll send you a calendar invite for Tuesday at 11 30. And then if anything changes between now and then let me know. It sounds like do you have a time line that you're trying to get up and are you trying to get up and running before me?

MIKE

45:49 No, I've... I've because I understand there's going to be testing there's implementation. We're going to need probably a lot of hand holding for sure. Yeah, we have for us. I know my CEO would... would like to have somebody on site for implementation meeting with training and all that stuff.

--- Pricing ---

MIKE

46:06 So, and our busy season is about to ramp up here. So I would say we're probably going to make a decision on what we're gonna choose within the next 30 days because I think we're at that point now that I've demoed enough to know kind of who's kind of where we're at cost wise and functionality wise, and, you know, scalability wise, basically will probably make a decision between now and April and probably look to implement some time later this year, probably September timeframe, I'm not saying we're just gonna put everything off and... and start.

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MIKE

46:41 Then we'll probably do some testing and everything prior to that, but as far as going live... going live for us, probably would look like until anything till end of Q3 or Q4...

MARIBETH

46:54 Okay. Alright. Sounds good. Well, we'll pick this up where we left off on Tuesday. Appreciate you taking a couple of extra minutes with us today, and if you have any questions in the meantime, then feel free to let us know.

MIKE

47:09 Thank you so much. I appreciate it guys.

MARIBETH

47:11 Have a good weekend.

MIKE

47:12 You too.

MARIBETH

47:13 Thanks bye.

The End