GONG

ServiceTrade Demo with Retrofit Service Company

Dan Waggoner with Retrofit Service Company
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Participants

SERVICETRADE

Dan Waggoner
Territory Manager

RETROFIT SERVICE COMPANY

Jeff Mann
CEO

Topics

Transcript

DAN

0:00 Good morning. How are you there?

JEFF

0:01 Good, good. So just... just to let you know, I got a hard stop at 10 45. So I got a contract signing and eleventh, so.

DAN

0:09 Perfect. I appreciate the heads up there.

JEFF

0:11 Yeah, that.

DAN

0:12 Was one of my questions. Well, well, I appreciate you joining me. I just sent you an email. Actually, I was fixing... fixing to give you a call but I'm glad to see if so, my name's Dan by the way, I'm one of the territory managers here at service trade. And my goal for us today was just to determine if this is going to be a good fit for what you're looking to accomplish at your business, right?

--- Purchase decision ---

DAN

0:34 Yep. And so the best way for us typically to do that is quickly review your current process. So I understand a little bit more about you guys and I know we've got a hard stop. So I just want to kind of brush up on a few things. Make sure I'm I understand things right? And then from there, we'll dive right into the platform, answer questions as we go throughout it. If it does look like a good fit, then we can set up next steps or talk about those at the end. If that sounds like a plan.

JEFF

0:59 Okay. Sounds good to me.

--- Accounting integrations ---

DAN

1:01 So basically, I was curious to hear any, you know, what... what you guys are currently using as far as software in a process in any maybe pain points that you've got that's got you in the room today, right? Any goals for improvement?

JEFF

1:12 Okay. So currently, we're using margin point and we chose that software a couple of years ago because of this in the inventory capabilities that they have.

--- ST app contracts and pricing ---

JEFF

1:21 So at that time, that was a priority for us and a lot of the service software. So we interviewed did not have that capability. Where they're lacking is time tracking some of the invoice details. So, for example, we want to be able to hide the individual costs. And I had an itemized invoice from the customer because lot of times customer doesn't care that we'd use so many filters. And so we built because it's a... it's a PM, it's a fixed price, right? So we don't want them to see that. So that's one of the... of the pain points we have with merchant point is they don't have that ability. Secondly is that we don't have any idea one of the vehicles, right?

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

JEFF

1:58 Because it's know GPS tracking on the... on the current software and they don't seem to be, I anticipate at any time of having that ability to do that. So ideally we'd like to see is, and I don't not sure if your software does is or not or if it's even available.

--- Tech On-site ---

JEFF

2:15 Is they have it automatically like the, if the technician is rolling, they're automatically and travel the technician for us on site that show has been arrival, doesn't notoriously our text, forget to say that they're done travelling. They forget to clock back out, saying the onsite working. And then so we have to, you know, constantly, hey, where are you at?

--- Parts management (inventory) ---

JEFF

2:32 You forgot to clock out. So that becomes difficult to do time sheets and invoicing. So that's where we're at that's kinda the 10,000 foot level of what we're looking to do. So again inventory is... is we definitely are using the... the inventory a lot. So, I'm not sure if you have an inventory system or not or any kind of any kind of alert to say, hey, this guy use a contact or three phases in a thermostat we need replaced the Van. So.

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

DAN

2:59 Gotcha. Yeah. So we can track your consumption absolutely. And we actually do have an inventory module. It's an add-on product that we developed over the last, probably pretty much started releasing it kind of after I think two years ago, you actually met with us. So around that time about six months later came out with that, but it's kind of in a rollout phase. So that would be something it would be kind of a available in the future once she's got started with service trade. If that makes sense. We're just starting it releasing to... to current customers and then kind of rolling it out to the new customers. So let's see here though tracking some time as well as I'm... presenting the Bill and quotes and such in a variety of ways to the customer can definitely handle that. And I'm remembering a little bit more of our conversation last time to be honest with you, I'm a little bit sorry about that, but I kind of lost some of my notes. I had them somewhere and I've got him scrambled site.

--- *Accounting integrations* ---

JEFF

3:58 Lot's changed since we... we met a couple of years ago.

DAN

4:01 Gotcha. Well, let's see. So, are you guys still using ESC or feel pulse though?

JEFF

4:07 No, because that's why we got away from ESC because they weren't web-based so that's why, yeah, that's why we started looking. And then we hook up a margin point than they are cloud based.

--- *Paper process* ---

DAN

4:17 Gotcha. So does margin point handle like work orders and giving the technicians? So that's all they use in the field for pretty much all of their process.

JEFF

4:24 Yeah, we haven't get a typical dispatch board. They have the work orders. We have a customer database, that kind of thing all... all built in.

--- *Accounting integrations* ---

JEFF

4:30 So it did everything that ESC did. Actually ESC did have GPS tracking, but this merchant point doesn't so it does it, you know, it has what we need. So we're... we're definitely function that's not a problem. It's just that we're starting to grow. And as we start increasing technicians, I can have the bottleneck of the invoicing and not haven't, been able to track the time.

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

DAN

4:50 Okay. Gotcha. Okay. Well, let's see here. Do you have a budget in mind for what type of, and to be upfront about it? To be honest, it sounds like we would be replacing margin point altogether. Is that your?

JEFF

5:05 That's cool. Yeah, correct. Yeah.

DAN

5:06 Okay, cool. What kind of budget you have in mind for that change?

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

JEFF

5:12 You know what? Right now? I think it's good. I think... I think they're charging us per technician or news. No, no, no, I think that, I don't even know. I have to look at that. That's a good question. I don't know what our budget is because I don't know what we're paying now. So, okay. Yeah... I'm gonna get that for you.

DAN

5:30 That's fun. We can... we can touch on it later and would there be anyone else like if we were on the track, right track today that you'd want to bring into the conversation here?

JEFF

5:39 Yeah, it'll be the service manager sharif?

DAN

5:41 Okay. Sounds like they want to have a little bit of a review and you'll be the end of the day one. Okay, cool.

--- Purchase decision ---

JEFF

5:48 On the first step, again, like it was last time like I clock, I get all the, I had like six different software companies we weeded out, got down to margin point because she liked the idea of the... of the inventory that was her priority back then. So now priorities change the.

DAN

6:03 Okay. Gotcha.

JEFF

6:03 That's why March points was chosen because of the inventory.

DAN

6:08 Gotcha. And let's see here. When are you looking to make a decision?

JEFF

6:13 Mobley, the beginning of cute too. Okay? Or at least within that quarter?

DAN

6:20 Gotcha. Do you have like a goal to be up and running by certain date?

JEFF

6:24 Yeah, no later than July because that's where our busy season starts.

DAN

6:28 Perfect. And are... are you considering anything else? Or is this I'm kind of, you know a little bit about us. So you kind of excited to jump back in and go?

JEFF

6:39 No, it's you. She's also bringing in a couple of service tighten and we met with, I met with somebody... somebody else yesterday.

--- Type of work ---

JEFF

6:48 I remember it was, is it can be a hadn't... hadn't heard of before it's like build or BuildOps or anything that was something like that? Okay. Yeah, yeah.

DAN

6:57 And from what I remember, you guys are... are primarily service foot. Well, I actually was looking at your website and so you said you have about seven to eight service techs that focus on that side?

JEFF

7:06 Yeah.

DAN

7:07 But, but it looks like you've got plenty of trucks. So, so you guys probably have a substantial construction side as well?

JEFF

7:11 We do, yeah, controls division as well.

DAN

7:15 Gotcha. Yeah. And so we focused specifically on that service aspect. Definitely a more fluid situation and process then... then a lot of construction and such applications would go. So.

--- Type of work ends ---

JEFF

7:27 Yeah. We really don't need a construction side. What does all service side?

DAN

7:30 Perfect. Perfect. All right. Well, let's see. I hope I'm not sharing my screen yet because I've just got my email up but.

JEFF

7:38 Yeah, wouldn't...

DAN

7:39 Be too bad. But here we go.

JEFF

7:41 Alright. So before you get started, I, a couple of questions for you. Sure. So where are you guys based out of?

--- Implementation and ongoing support ---

DAN

7:46 Yeah, we're in Durham, North Carolina.

JEFF

7:48 Okay. And then what kind of service you provide as far as I'm support?

DAN

7:53 Yeah. So support is 24 seven call support. I mean, you're going to have an account manager throughout your subscription? You've got the onboarding services would be a project team that, you know, you can choose how long you want to have them for typically they're provided for the first 90 days and you can add to that if you need it. So, I mean, there, there's honestly a lot of different options for support. The, you can even hire a technical account manager that's someone who is like our geek squad, right? They... they check in with you and check on your utilization and give you advice on what you can do, answer any questions for what, yeah... reports analytics, that kind of thing. The basic support that comes with your account, right? So you can call for customer service. You've got a pop up bubble on the application in the mobile as well as on the web based side of it where you can just submit a support ticket. I think our average response time during... business hours is like six minutes and then you can support an email ticket or you can... I think those are the three

options. The fourth option would be your account manager, just emailing them if it wasn't as urgent. But, yeah.

JEFF

9:03 Is there a call and function, or is it just email?

--- Implementation and ongoing support ends ---

DAN

9:05 Yeah, you can call there's a customer service line call, get a real.

JEFF

9:09 Okay. Good. Okay. Alright. And then the existing database, we have... have all of our accounts. Do you guys offer that to switch it over to your software?

DAN

9:17 Great question. And so it would depend on what kind of experts they allow.

--- Accounting ---

DAN

9:22 You know, I've heard just about eight from Z, you know, 80 Z with the types of allowed exports of, you know, previous platform. Could you get everything on an E, a CSV or excel for?

JEFF

9:34 That I don't know, have to... have to look into that.

DAN

9:37 And what kind of imports where you're looking for? Do you have equipment in there, or is it more customers, locations, contacts, items price?

--- Assets ---

JEFF

9:45 All that stuff, his... his service history, you know, because they're starting to build up a week because we... we imported all the stuff from ESC into ours, which included all the service history. And then right now, so margin point hold... hold all the service history for all the accounts that we were, it, that's valuable to us to make sure we keep that.

DAN

10:02 Okay. How is that? Compiled the service history?

JEFF

10:05 I don't know. I, all I know is how to look for it and where to look at it. So you look into the account page and it's all right there. So I'm not sure how it's compiled. And, okay.

DAN

10:15 I was just curious if it was like specifically like this job happened, this job happened, that job happened.

JEFF

10:20 That way, yeah, yeah. Like on... on this date here's what happened for this unit. So.

DAN

10:26 So if that was, I mean you can attach a file like that, your locations in service trade. One thing that's not really in portable if you will, is service history. But if you have it like I'm... I'm assuming I'm not quite sure what kind of file it is in right now, but if you had like a rundown of everything, you can easily, you know, have a PDF.

JEFF

10:46 For, right? Coffee.

DAN

10:48 Yeah. And just attach it to the location. So every time that location came up, they'd have the access to that.

--- Assets ends ---

JEFF

10:54 Okay. Alright. And then see that was, yeah, that's... that's it for now. As far as the first two questions I have right off the bat, so.

DAN

11:04 Okay, cool. Yeah. And... and thank you for those and to answer about the other items as a service history is... is the one that might be a little bit different.

--- Accounting ---

DAN

11:12 Everything else Adams prices, customers, locations that's pretty simply import it for you. And the equipment is another one that is, it just depends on what the file types are. So excel and CSV, you... you know, if you want to send me over a example of a couple of pieces of equipment.

--- Accounting ends ---

DAN

11:30 And in that type of file, I can run it by the customer support and make sure it would easily go in. But I'm typically don't have any issues there.

JEFF

11:36 All right, fair enough.

DAN

11:39 Right. And I'm so out of Durham, North Carolina. And that's a kind of current... current call, right? You know, I'll go ahead and pull back the curtain a little bit of background on us. We... we were specifically designed for the commercial service industry and to double check with you can't see my screen here, right? Says trusted by.

JEFF

11:54 Yeah, I can see it.

DAN

11:55 Fantastic. So specifically designed for commercial service industry. There's a few of the customers that we work with, you might recognize got about 800 customers across the US and Canada. Our typical company that we work with is from three to 20 technicians, right here's. A lot of the big boys. You know, we work with companies up to a 1,000 texts but I'm in the wheelhouse of three to 15, three to 20 is... is really our main focus right now. And growing our customers, helping them grow is what we want to do. Our... our CEO created the company. He saw big gap between the hard work that you guys are doing and presenting that to the customer, them understanding what you guys do for them because there's a lot of value there.

--- Customer engagement ---

DAN

12:39 So being able to show them what you guys are creates value for the customer. And if you given good customer service, it leads to growth... and our customers see about 23 and a half percent increase in service revenue growth. How did they do that? Starts with efficiency, right?

--- Paper process ---

DAN

12:57 Not having to have bottlenecks like time tracking or... issues. It's slow you down, right? Full visibility, less administrative burden for technicians, allows them to get more done. And same thing on the office side, right? When the techs are done and they're... they're sending reports back, right? You want to have those as clean as possible to be able to make the next step.

--- Customer engagement ---

DAN

13:20 No, of course, efficiency is what a lot of platforms aim to provide, right? You can only get so efficient. And the next step there to continuing growth is engaging online. So we want to take that truck rep, you know, I mentioned those 20 beautiful trucks I saw on your website there. Take that and put that all over the internet, right? So increase your visibility online and engage with your customers, make it easy for them to do business with you. So online quotes, showing them pictures in the story of what's going on with their equipment or it can be really valuable to get that in the DMS hand, the decision makers hands, right?

--- Quoting ---

DAN

13:53 I'm to get that sign off approval for a quote. So the easy to approve button right there as well. Those two aspects of quoting, getting out that quote in the first, you know, 24 to 72 hours pictures in a one click approval, our customers see about a 30 to 40 percent increase in quote approval rate... standing out and again providing better information for your customer.

--- Customer engagement ---

DAN

14:17 So how does your company differ from others, right? So better service reports, record keeping tracking for your customers... and the invoice. Like, so right here is a first example of kind of presenting the Bill to a customer and they're six different options.

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

DAN

14:33 So this is one of them. And this would be called the line items with grand total only. So you're showing what you used here, but only the grand total and we'll go through the other options as we send out invoice and quote today, that report that we were on... on the previous page is going to be attached to every invoice.

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

DAN

14:50 So they'll see what they're paying for every time and understand the value in the service you guys provide. So that's a quick background on us. Did you have any questions stemming from that?

JEFF

15:01 No, not yet.

DAN

15:03 Alright. So I'm gonna take us through a work order for today. I'm signing in here on the office side if you will get a full overview of what's going on. So we've got our daily schedule overdo jobs and appointments. Once you've set up recurring services or repairs that are do at a certain date, if you haven't got him scheduled out in that timeframe, you'll get a warning here on the front page when you sign in. And then overdo jobs just helping you prioritize, make sure nothing slipped through the cracks. Of course, is jobs from our complete, they're gonna fall below for the office to make the next month. So let's see. I've got my preventive maintenance with our best tack here, Dan Wagner and we're heading out to a top golf today.

--- Recurring maintenance ---

DAN

15:43 So I'm gonna go take a look at our work quarter here's. What we're gonna, this is a service template. So once you've set up maintenance is in recurring services for customers. This template is going to show up every time that services do. So we've got a quarterly preventative maintenance today.

--- Tech On-site ---

DAN

15:59 Our checklist estimated price, time and material all fall in on the work order. Every time that's do you can clearly see the Bill to and ship to appear above... and the equipment that we're working on today. Alright? So I'm gonna share my tablet view now with ya.

--- Tech On-site ends ---

DAN

16:33 Feel free to slow me down or ask any questions as we're going through this.

JEFF

16:37 Okay.

--- Tech On-site ---

DAN

16:45 Right. So I've got my application up here. Can you see top golf San Jose at the top there? Cool. Alright. So three different ways to track time in service trade. You're going to have the job prep... in route an onsite. And I know you mentioned earlier, right? They sometimes are forgetting to do one from the next. So clocking in and notifying customer... gonna go ahead and send you that notification letting them know you're on the way. That's also gonna ping the office, it'll show in that dashboard as well as the dispatch board where the tech is I'm heading to. Once they arrive on site, it's gonna prompt them to clock in on site... as far as clocking out to their next job, right? And whenever they went to access information on their next work order, it would remind them, hey, you're still clocked in previous job and that type of thing. So... they can only be clocked into one job at a time.

DAN

17:44 Now, this is the... the base structure for clock activity. There's three different ways we're going to track time. So I wanna kinda come full circle on this with the time card application towards the end here. But this is the... the basic function for the technician on the work order.

--- Assets ---

DAN

18:00 So right away, I've got my service pretty simple... layout for the mobile view, the service. I'm here to provide the equipment that I'm working on. And you mentioned service history being very important for you. I 100 percent agree. And that is, you know, something they're gonna have access to once you start building it in service trade, going to be able to look back at all the work that's been done specifically on that equipment. So you might have a location with multiple pieces of equipment. This is going to drill down to only the job's done on this equipment to find out what might be important. So I can look back at previous work quarters, notes pictures here. Also any deficiencies, so that's just repairs or prepare opportunities in the status of that opportunity. And what was done attachments is going to be, this is where you could attach that PDF. I'm either on the location page or per pieces of equipment... for what you've got, you know, what happened previously... or any pictures diagrams, manuals. How does that look as far as services?

--- Deficiencies ---

JEFF

19:11 That's good. Awesome.

DAN

19:13 Awesome. So technicians on site performing is maintenance. I'm gonna go ahead and report a deficiency. So repair opportunity, recommended repair that we have for this customer. So down at the bottom here, I'll add efficiency. This is going to be a six step report the same every time... compressor needs replacement. Next step, gonna add that imagery for the customer... video of what's going on. And this can be used by the office as well to help determine how to send that proposal quote up. So we'll go ahead and take that on there. Grab a second photo. For good measure. You can add audio memo as well or any notes to these if necessary. Three options here. So if you want to just catch some recommended repairs or if you've got an actual inoperable unit, we'll go ahead and flag this one for being an optimal. All my equipment on this location will show up here. The first few letters or numbers are gonna allow me to drill down and find the equipment. I'm looking for... service trade knows it's an H back units. So we'll move along to our last step and just market as new. So that's my report and I've done that's. Going to show up back in the office here in a moment before we head back into the office, wanna take a look at our job items here.

--- Tech time tracking ---

DAN

20:43 We're talking about a little bit about inventory and such. So I'm tracking your consumption here and also time here's. Another way to track time. The if you're looking to track the billable hours, right? So we know this job should take about two hours. What Dan can do is once he wraps head on in and assign this to a technician. So I'm gonna source it through myself that's gonna easily allow you didn't hit save. I'm easily going to allow you to run a report for all of the hours that Dan sourced throughout the week.

DAN

21:17 And look at it side by side along a job... to see... see what he's getting paid.

--- Parts management (purchase orders) ---

DAN

21:24 If I need to add a job item or part, I can do that here. Well through a widget on here. It's gonna find the part I've got. If I need to add something that's a one off, I can do that other. Got four of these. I can select the parts vendor or just myself as the technician using it, maybe a truck that I was assigned to.

--- Deficiencies ---

DAN

21:45 So we'll go ahead and add that. So the office knows what we were able to use and to charge the customer accordingly. So let's jump back into the office here and take a look at the report... that Dan has produced. So on my email and let's see... where are you able to see the... the mobile app for the most part there?

JEFF

22:13 Yeah, that's mobile apps. Good. Okay. I'm more looking at more looking for the back of house stuff.

DAN

22:18 Cool. So the deficiency report has been, I've got a quick notification here. So Dan still out there working, he might be chatting with some friends. He made, he knows what he's up to but we've got a report of the problem for the customer and we want to get this out to him as soon as possible.

--- Quote templates ---

DAN

22:37 Got a compressor needs or placement. Everything is tied together here as far as customer equipment, location contacts. So we've got prefilled information. We're just going to generate a quote.

DAN

22:50 Based on our asset info, we'll go ahead and apply the quote template for a compressor replacement. You can create as many templates as you'd like to quickly apply these to common repairs and issues that you might have that you're proposing or quoting for customers. So once I've done that, I mean, I'm ready to go essentially but want to point out that we're not locked into this. If you would like. You can adjust the... adjust the way that you want to send this. You'd set your... your default, right? So I think I've got mine on grand total only. And I'm gonna present it that way. But you can see here I can do, you know, full detail or summarized by line item. So grand total only. But I definitely get what you're looking to do there. One of my customers where I think I do one of my customers mentioned, you know, where there's mystery there's. Margin, right? I don't need somebody looking at Google at every single item on the... on the invoice and trying to find a eight bucks cheaper.

JEFF

23:47 Exactly.

DAN

23:48 Almost give them too much to think about sometimes... perfect. So, you know, again and you're not locked in here. If this template, you know, some customers are different and others, maybe the tech made a note. This type of replacement is gonna take us twice as much time. It's a difficult unit to access. So we'll double the hours here. You can always make adjustments, add parts, change things if need be. But I'm all set here. I'm gonna shoot this over to my customer. I can toggle on and off any of the attachments, maybe Dan left and audio memo, who knows what he's saying?

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

DAN

24:17 We'll keep it in house, toggle it off. In this case, we're going to leave everything... Jeff. I'll go ahead and send it to you. If I need to send this to another contact, maybe a company at a corporate level or decision maker that might not actually be on location.

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

DAN

24:31 We can tie those in up here. We'll send this to Dan as well. So I'm gonna shoot this over to you and we can take a look at the presentation.

DAN

24:51 And do you have... a... a way to pull that up on your end real quick?

JEFF

24:57 Yeah, let's see.

DAN

25:00 Sometimes it's nice to kind of look at it from the customers angle.

JEFF

25:13 Okay. So, I'd have to quote for a pair, right? Yeah, I don't remember seeing this last time. Okay. Yeah, you respond. So, okay. Yeah, that's good. Okay... okay.

DAN

25:27 That... is that what you're looking to do as far as the grand total there?

JEFF

25:33 Yeah, that's perfect. Just gives me the total. So, yeah. Okay... okay. Good.

--- Purchase decision ---

DAN

25:37 Hi, how about, how do you feel about, you know, the process of getting it out there? Is that, does that look efficient or effective?

JEFF

25:44 You know, I think it... it... it does it, there's a lot involved there. So, you know, I think the process once you learn it won't be so bad, but you kinda went through pretty quick which I'm okay with because that part of wasn't it's not so much of a button for me.

--- Purchase decision ends ---

JEFF

25:56 It's more of the time tracking that I'm looking for. So, but yeah, as long as it looks like the technician related most of that in the field. And then the back house did the finalized and send it off. So, yeah, that definitely works better. So, okay. Yeah. Okay.

DAN

26:11 Gotcha. Yeah. And I was, I can obviously send you the recording here so we can slow down, but I wanted to make sure we got through it as much as possible here. And our... our time today, the, how about files attachments, photos, is that something? Is that different from what you guys current?

JEFF

26:25 No, no worries. Well, the way the proposal is sent, yes, I don't know if large margin point does X, we typically don't do that in the software, we do that external of the software. So, because we track around proposal numbers and everything else. So, but this might be something we could be doing as long as we can track it.

--- Quoting ---

JEFF

26:45 So, you know, as far as, okay, here's, all the proposals that went out in the month for all the accounts, right? So there's a report for that so we can follow up with them.

DAN

26:56 Yeah, fantastic. I'm glad you mentioned it because that's sort of the close to my quoting section here, which first of all, you know, I can see that you've viewed this if you approved it. I'm also gonna get similar notifications like the one we saw for that deficiency report. So I'll pull up my quotes board and I can look at anything, you know, submitted this week, for example, submitted but not viewed that's one that I hear our customers talk about a good bit. Hey, if it's not getting opened, I'd like to know about it. I can just get it right back to the top of the inbox books and all of the ones that weren't open that we sent yesterday, add comment, but you can sort and organize these as granular as you want. Look at the higher dollar ones. Look at the ones that are inoperable instead of just recommended, right? And drill down and find what you're looking for as far as everything sent out in the month, the week day. What have you?

JEFF

27:46 Okay. Alright. I see there repair order and the quote, can we have our own code numbers? Do we have to use those court numbers? Yeah.

DAN

27:56 To quote numbers are going to be generated by service trade? Yeah.

JEFF

28:00 Okay, right. Got it. Okay. All right.

DAN

28:04 Does this type of visibility look like it would be helpful?

JEFF

28:07 Yeah, this is helpful. Okay, perfect. So, I know we're getting... we're getting close on time, has time tracking work that's where... that's where I'm really interested in.

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

DAN

28:16 Absolutely. Yep.

DAN

28:22 Yeah. Let me go back to our dashboard here. So I'm gonna pull up our work order and I'm gonna clock out as well.

DAN

28:38 We've got Dan dance clock events here. And I know you mentioned that, hey, it's not something they remember to do occasionally, but you're going to have their... their travel time if they had prep time to be here as well and their onsite time. And then you got your... your labor. So that's what the customers getting charged now with the time card application, which I think that's what you're gonna wanna add. What you do, you'd have a module inside the app or the tech at the end of the day or the end of the pay period is going to go in and look at his clock in activity on the work order, what was charged. It's all next to each other, right? And then his submitted time, what he's saying he was therefore right? And then he'll submit that report and that will come to your administrator, whoever is receiving those on the back end and make sure they're lining up with what they're charging the customer, make sure it all make sense, right?

--- Accounting integrations ---

DAN

29:30 Right? And then they'll... they'll submit that it was a approved, insert it to your accounting platform and take it from there.

JEFF

29:39 Okay. So, so just so you know, that our accounting department won't allow anything to integrate into Quickbooks as the weekly stand alone.

DAN

29:46 That's perfect. I actually love to hear that even though we do integrate to Quickbooks, but, yeah, and probably the purpose of that is not too many hands in the pot, right? You don't want some.

--- Invoicing ---

JEFF

29:56 Yeah, they're very tight with that... with that software. So, yeah. So how we do it now and how will continue to do it? Most likely that the software program will generate a proposal or a invoice. We literally have a print that invoice out and submit that to the billing department and they'll turn that into an invoice. Through Quickbooks.

--- Invoicing ends ---

DAN

30:16 Perfect. Yeah. So for example, reports like that, what I could do is run danced time report. And this is just in the base level of service trade. I'm actually gonna pull up a report so I could run all technicians time cards, right? And pull up that report either printed out or email it over to the accounting folks.

DAN

30:52 So, in the time card section, you've got your dashboard, right? Review and time cards. So this would be your status whether it been submitted by customer, who the technician or I'm sorry, by technician, who the technician is, the labor items that were on that work order, and then their time stamps, it's in the, so the technician will sign off on that and send it in. And then you can approve that it is actually correct. So we can make an export after that. Once it's approved, right of this. And I have a video that I can send over with... time card for the administrator time card for the technician that walks through exactly what you all would be dealing with.

JEFF

31:38 Okay.

DAN

31:38 I think that would be useful.

JEFF

31:39 Yeah. Once you do that, so we can absolutely... so then each invoice or work order, we'll have... the technicians travel time, clock in and out time, right?

DAN

31:56 Yep, absolutely. And if they wanted to add any job prep on there as well. So if they're at the parts warehouse loading up, they could apply that as well if.

JEFF

32:06 Yeah.

DAN

32:08 Now, when it comes to tracking your guys on the move, right? Because I know you mentioned that and let me bring up our website here. So the service trade core application does not track vehicles like a... like a number, right? It tracks when they make that clock interaction.

DAN

32:26 So if they're clocking on site being it's going to let you know the GPS timestamped exactly where they were. So if they're down the road, you know,

mcdonalds and they're clocking in on site, you know, that something's going on. They're not there, right? But.

JEFF

32:38 But...

DAN

32:38 It is not going to track there every inch branch movement, and.

--- Tech On-site ends ---

JEFF

32:43 That's time. That... that really isn't that much of a concern. It just mostly when they're on the job and whether off the job.

DAN

32:50 Okay. Cool. Gotcha. I was just curious. Gotcha. We, I was gonna mentioned we do have that ability and it is by field logic's it's an integration that they could set up for you. But the reason we don't do it, you know, that in depth is, you know, some people don't like uncle Sam looking over the shoulder all the time, right? If we're big brother, if you will.

JEFF

33:09 Yeah.

DAN

33:10 But the other thing is it drains the device battery. So, but that's available if you... if you needed to add that down the.

--- Purchase decision ---

JEFF

33:15 Yeah, no, just pinging and where he's that's fine. Over there.

DAN

33:18 Okay, cool. Perfect.

JEFF

33:20 Okay.

DAN

33:22 So, let's see here, we... we covered briefly the... the time. Well, how did, how do you feel that, you know, how do you feel your understanding of that is so far?

JEFF

33:31 The time it's still a little bit confused on that. That's okay, send the video over so we can... we can kinda started that a little bit. Okay. So I'm trying to picture how that compares to what we're doing now. Like the guy's time, she, do you have like a... a time sheet for his total list of the week?

--- Tech time tracking ---

JEFF

33:48 You know, if that's in the video that's fine. We went and spent time here. We can just look at that.

DAN

33:52 Yeah, I'll get, I'll send over a sample export of that for you.

JEFF

33:56 Yeah, just the way I can see what will be submitting to accounting for payroll. Okay.

--- Tech time tracking ends ---

JEFF

34:00 Well, because currently, what we'll do now is we look at the invoice and then we look at the time sheet, and then we do the work order. We look at the time. She compare that to make sure that we captured all the time involved that work order, and then generate the invoice... that's... that's the bottleneck. So.

DAN

34:20 Okay. So it's the thing is getting the invoice out faster really?

JEFF

34:24 Correct.

DAN

34:25 That's the goal.

JEFF

34:26 Okay. Cool. Yeah.

DAN

34:28 Let's see here. Let me bring up our.

DAN

34:34 So, it sounds like you guys want them to be submitting their end of the day results as quick as possible. Not.

JEFF

34:40 Yeah. Like end of day. So when they're done with their, well, we nice, if that, when they're done with the... with the job, whatever work order they're doing, that... that would automatically. Okay, that closed it out. So we now... we now we can always fill in real time.

DAN

34:53 Okay. Gotcha. Perfect. Yeah, I mean, real time billing... is... is fantastic, right? Not everyone is really comfortable doing it that way whether they're waiting on cost price is different things, but that's a goal of a lot of folks. And... and we want to give you that ability, the work quarter.

--- Tech On-site ---

DAN

35:10 Once that is completed, it's going to be available to invoice. All you gotta do is complete job an invoice and their clock activity. You'll be there. I think that the main thing and Dan added those parts. It's reminding the standard cost is 12 bucks for this. Dan did not have pricing visibility.

--- Dispatch ---

DAN

35:27 So date that if I need to add anything else here and welcome to that, another way to kind of help coach them to remember clocking in and out is to released jobs on the go. And I know that sounds like micro managing, but for the first couple of weeks, what you can do is you can have a schedule built out for months in advance, right? And every time someone completes a job, it's one button to release their next job to them. So it would just be a, you know, a couple of weeks and that, that's sometimes what I hear for some of the text that... that aren't able to remember things like that, doing that a couple of weeks forum, Sears it into their head pretty quick.

--- Tech On-site ---

JEFF

36:04 Okay.

DAN

36:05 But again, you know, they wouldn't be able to... to clock into the next job without clocking out of the previous one. So that will remind them as well. Let's see here. So brought up our invoice.

DAN

36:18 And we're ready to send it out as long as the hours on the job relate to. So I have my clock events on that previous job, right? The work order page?

JEFF

36:27 Okay.

DAN

36:28 And the... the... the labor on the invoice that we're charging the customer. So here, my clock events... here's the labor. So it is going to be right there for them to take a look and see if it's okay to invoice if there's any questions about it. Now here's where you might want to say, hey, cool.

--- Tech time tracking ---

DAN

36:43 We'll wait for them to submit on their end where I can follow up with them right now. But if they did their clock in function correctly here, you wouldn't even have to wait for them to sign off on their end of the day time.

JEFF

36:52 Right. We can just do it right then. Yeah. Okay.

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

DAN

37:00 And I had the set up to go out with your logo on them. So let me change that.

JEFF

37:04 I saw the logo on it earlier.

DAN

37:05 You did. Okay?

JEFF

37:06 Hello. Yeah. You did a good job on that. Yeah. Okay... okay. So it will typically print the invoice anyway. So he's hit print sort of send link.

--- Invoicing ---

JEFF

37:14 Okay? Because, yeah, because the... the... the customer won't ever get an invoice from us like this though is get an invoice from Quickbooks?

DAN

37:24 Okay. So you guys won't be invoicing through service trade?

JEFF

37:27 No, okay.

DAN

37:31 Yeah. You're welcome to do it that way. The... the service report can be sent on its own or you can import the information or I'm sorry, create a report to send over to Quickbooks or not send over, you know?

--- Invoicing ends ---

JEFF

37:43 Now.

DAN

37:44 So, you can look here and, yeah, and type in, right? And you can do that individually or do it in bulk, right? All the completed work orders for the day, send those over in that report, but you can also convert these, right? A PDF excel, however you'd like to.

--- Accounting integrations ---

JEFF

37:59 Right.

DAN

38:00 To send that over to the customer or to the accounting? Okay?

DAN

38:10 Have you guys had, I know we're running up on three minutes here? Have you guys had some issues in the past? I'm just guessing with somebody some... some sort of platform messing up your Quickbooks?

JEFF

38:23 No, just that our accounting department doesn't we don't integrate anything in there. So whether it be service or controls nothing. So they're just very tight with the Quickbooks. So they don't want anything to do with it. Gotcha. Yeah.

DAN

38:37 Well, you know, I love that because so many folks have, the, their main focus is thinking about getting information to accounting. And it sounds like you know, or I'm sorry, their... their main focus is figuring out a way to integrate.

DAN

38:49 I apologize. Sounds like you guys understand if everything if your process is in the field are efficient and effective and producing clean report, it's easy to get that stuff. And so it really starts at the beginning kind of... is... is what I'm trying to say.

--- Paper process ends ---

DAN

39:05 So it's awesome to... to meet with somebody that that's not completely focused on. Just how does it tie into accounting?

JEFF

39:10 Yeah. We're more operation oriented at this on this level? So excellent. That's what we're trying to... trying to figure out as far as what's best for us?

--- Parts management (inventory) ---

DAN

39:21 Okay. So what does, what are your questions for that for the last two minutes here? What are we are next steps would?

JEFF

39:28 Would be, let's... let's talk about your, are you talking about using parts and stuff? Let's, maybe it's not a quote unquote inventory but maybe a list of parts. Let's say that Dan used in during the week that we need to replenish his truck. How would we go about doing?

DAN

39:43 Yeah, absolutely. Great question. And so similar to the time page or jobs page and parts, you can track jobs throughout the process here as well. Job items. So I've gotta do is search for let's say... my technician, Dan, who sourced it where it was source from. So dance truck and you can set your technician to audit a medically be assigned to a truck if they're using the same track every day. So that means every item he ads will automatically pull from that truck. So at the end of the week, whenever you'd like just run that report and it's going to pull up everything here and you can export this to excel, combine it with your other text, whatever you've gotta do or truck by truck, right? To... to send out your replenishment orders.

JEFF

40:31 So he'll... he'll previous support report of all the parts used from his truck. Absolutely. Okay. And there's a... there's a way to separate that from specialty parts where it's not typically a stock item. I can run to go get a control board or something, right? Which we would need to replenish. So.

DAN

40:50 Absolutely. Okay. Alright. Yup. You've got your item types here. So, you know, we've got fees labor, you know, actual parks and items that you might have on the truck. And then you've got, you know, bigger equipment probably as well. So those can all be sorted.

JEFF

41:07 Okay.

DAN

41:07 For sure.

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

JEFF

41:08 Okay. Well, that's... that's pretty much where they need to know. So, so it can't be done on the inventory with sort of check off that box at this point. Is there an extra fee for that? Or what you're showing me has been included? Yeah.

DAN

41:19 Everything we've looked at aside from the time card which is a small add on is included. So.

JEFF

41:24 Okay. Got it. Okay. Alright. So we have inventory, we have time cards. We have GPS. I'm gonna call it location... and you do have the service available 24 hours a day. Is there any future developments that you're coming out with that we should be aware of?

DAN

41:50 Yeah. Well, we are working on our project management.

JEFF

41:53 Just give me one second. I'm almost done. Okay. Bye now.

DAN

41:56 I was gonna say, what are you curious about? What?

JEFF

42:00 Is there anything that's... that's... I'm... I'm trying to think, what else would be, you know, is there anything that your company is doing the same better than someone else or anything developed that you're in development or that's the future? We're going to be doing whatever, you know, I don't even know but one of them was saying, well, they have AI coming out, but that doesn't mean anything to me. So I have no idea what you're going to be AI. So you just want to know, are you... are you

constantly in development of new types of systems, are keeping up with technology? Is more what I'm looking for?

DAN

42:29 Yes, 100 percent. And we actually just got a I'm 85,000,000 dollar investment from... from investment group to continually developing our platform. And so we are in growth mode and development mode consistently. We're always looking for applications to partner with, but also add on to our develop our platform to make it better for commercial service contractors and those that's our customer base, right? So that's where we get a lot of our feedback and clues to where we could make it better.

--- Type of work ---

DAN

42:59 We've definitely got a team that's dedicated to doing that. Some of the focuses right now could fall into better managing projects and longer. And that type of thing because we are, you know, created for service and typically jobs that last longer than three months, you know, are the best suit for service trade.

--- Type of work ends ---

DAN

43:16 But we're kind of developing towards working to... to be better with that. The other, you know, that you mentioned is... is inventory, right? We've been working hard on developing something that's going to allow our customers to easily track and manage inventory through service trade. But we're definitely always that's always on our mind and you guys are... are commercial, right?

--- Type of work ---

DAN

43:34 All partials. Okay. Yup. So, so the thing with us that you... you ask, you know, how are we different? We only work with commercial service contractors. We don't work with anybody else and other folks can tell you that, but they... they are line service tightened was created for residential. So many others out there, you know, look on their website. It's gonna be right there. We work with, you know, landscapers or this that and the other, we don't we work with commercial service contractors primarily that are dealing with, you know, complicated if you will equipment and high end machinery, right?

--- Type of work ends ---

DAN

44:06 So things that needs to be tracked and managed efficiently and effectively. And... and our goal is to help make it easy to do better business with your customers, right? So... that's our big differentiator. All of our customers are doing what you guys do. And... and we're going to use that 85,000,000 to continue to develop this platform in the years to come to... to be more efficient for you.

JEFF

44:29 Okay. Alright. Good. Okay. Well, send me those videos so I can forward those over to stream. If you look at those myself, she's a service manager, shoot me that she's one or to be making this decision on which to service software to go with. If we're getting with change at all. So, yeah. So send that over to me. And then, yeah.

DAN

44:47 Absolutely. Yep. My contact will be there. I know you gotta run. If you need to call me. Feel free to do it. I'm I may follow up and see what's going on here towards starting next week. Would that work?

JEFF

44:56 Let's do it more towards the week after that.

--- Purchase decision ---

JEFF

44:59 Okay? So, because we got a lot more to interview. So I don't want to give you any kind of, you know, false sense of hope if we select that, go somewhere else. So, yeah. And I'm going to be off most of next week anyway. So.

DAN

45:11 Sure. Yeah. And I know you're looking at a lot of other stuff. I would say, you know, since we just kind of brushed over here, I'd love to have the chance, you know, a rebuttal if you will, if you feel like you're leaning another way if we make it to the top three list, at least, I think we could really be a great fit for you guys. So would love to have at least one last conversation before you make that other a cigna.

--- Purchase decision ends ---

JEFF

45:32 Okay. Sounds good. Well, we'll do that.

DAN

45:34 Alright. Thanks. Great day, Jeff. Yep.

JEFF

45:36 Okay. Bye.

The End