



# ServiceTrade Demo with Kruse Corporation

Maribeth Steffen with Kruse Corporation  
Recorded on 3/21/22 via Zoom, 1 hour 23 min.

## Participants

### **SERVICE TRADE**

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### **KRUSE CORPORATION**

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*Manager, Service Administration*

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*Service Manager*

### **OTHER**

Dlanzrath

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# Transcript

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

MARIBETH

0:00 Hi, Kirsten?

KIRSTEN

0:01 Hi, how are you?

MARIBETH

0:02 Good. Am I saying that? Right?

KIRSTEN

0:04 Yes, yeah.

MARIBETH

0:06 How are you doing today? I'm... good... good. I'm Mary Beth... Brett is going to be joining. I know that you talked with him and I think here he comes. Are you in a conference room or... or is your team I'll kinda joining?

KIRSTEN

0:23 We're all I think joining separately probably.

MARIBETH

0:26 Okay. All right.

KIRSTEN

0:28 Here corona someone.

MARIBETH

0:31 Hi, Brett.

KIRSTEN

0:33 Hey, Mary, Beth. How are you? How are you doing good? Thank you.

KIRSTEN

0:42 It...

MARIBETH

0:43 Looks like dance logging and...

MARIBETH

1:00 Hey, Dan, can you hear me?

DLANZRATH

1:03 Yeah.

MARIBETH

1:04 Hey, I'm married that. Nice to meet you.

DLANZRATH

1:06 Nice to meet you.

MARIBETH

1:09 Kirsten from your team is on, and Brett from my team is here. We're just waiting on a couple of others. We're a little early, so we'll give him a couple of minutes.

MARIBETH

1:42 Hi.

JANINE

1:42 Janine. Hi, how's it?

MARIBETH

1:45 How are you today? Good... good?

MARIBETH

1:54 Right.

MARIBETH

2:07 I think we're still waiting on jeera?

KIRSTEN

2:13 Here at, she has a meeting right now. I'm just kinda had a conflict, but she'll just be stepping in with me. We share the same office, so she should be in here shortly.

MARIBETH

2:22 Okay. No worries. And then I think that lady, yeah. And is it Adam was on the invite as well? They didn't accept the invite. Do you know if they're planning to join?

KIRSTEN

2:35 I am not sure... I.

JANINE

2:45 What was that lady is not going to be able too?

MARIBETH

2:48 Be she?

JANINE

2:49 Had a meeting but was hoping to come in later on, okay?

MARIBETH

2:53 Okay. And do we know about Adam? I...

JANINE

3:00 Do not.

KIRSTEN

3:05 Well, let's say we're probably good to start without him.

JANINE

3:08 Okay. I was gonna say.

MARIBETH

3:09 Well, I am recording this. So, if it's okay with you guys, we can go ahead and get started and then as people start with trickle in, I'll... I'll get them in the meeting room, and then, you know, if... if we determine that, you know, this... this might be a good fit for you. I can send over a recap email and a copy of the recording. If you think that would be helpful.

KIRSTEN

3:36 Cool.

MARIBETH

3:38 So, everyone, I appreciate you taking time to meet with us today. My name's Mary Beth on the field territory manager for the mountain west region, that service. Trade. Brett is my colleague on the inside sales team and I believe Brett, you spoke with Kirsten, the schedule this?

KIRSTEN

3:55 Right. That's correct. How's everyone doing today? Hi. How are...

DLANZRATH

4:00 You?

KIRSTEN

4:01 Well, thank you.

--- Purchase decision ---

MARIBETH

4:03 So, so our plan today is I just want to kind of review some of that information Kirsten that you and Brett talked about last week, get a better understanding of your business and kind of your... your priorities and what you all are trying to accomplish with the transition away from SSO. And then this will be kind of like a high level demonstration. Typically these sorts of evaluations can take more than one meetings. So it's kind of just an introduction to learn more about each other, determine if it's a good fit. And if it is, then we'll figure out what the best next steps are after this call, how's that sound?

KIRSTEN

4:42 That sounds perfect.

MARIBETH

4:43 Awesome. Cool. So, I guess my... my first question right off the bat is I think some of you have already seen service trade before. I think it was about a year ago that we talked to you. Does that sound right?

KIRSTEN

4:58 Yes. So here or myself and Janine, we're in that?

DLANZRATH

5:02 Meeting.

MARIBETH

5:02 Okay. Alright. I'd love to know kind of what was the hesitancy with moving forward at that point and... and what's maybe different this time around?

KIRSTEN

5:15 So, the first time that we looked at it, we had kind of just started discussions of eventually switching softwares. However after getting into it accounting after looking at everything accounting decided they were also going to switch software. So that kinda put a hold to us which I, how I had his name at the tip of my tongue who we dealt with the last time? I kinda let him know that.

MARIBETH



5:38 Hello?

KIRSTEN

5:39 Yeah. Okay. So I was like we're kind of at a standstill right now. And so we kind of accounting decided to make the leap to kind of change software so that we can make sure we integrate with what they choose.

*--- Accounting integrations ---*

KIRSTEN

5:51 And now accounting has made that John, we're switching across the board or PM service and for accounting. So now we're kind of ready to actually sit down and pick one that we want to move forward with. And then I know at the time, everything was great from my by active, but Janine is sitting in for the accounting side and she wasn't thrilled with. Back then, the way that time was done, the way payroll has shifted through. So I... I guess would be curious to see if anything has changed on that end. And then also though we haven't gone, we haven't decided yet fully on an accounting software. So that'll kind of have, I guess whichever software we go with, I know Janine can probably seven, but I think they're looking at actually America and Sage intacct.

JANINE

6:44 Those are two of.

KIRSTEN

6:46 Yeah.

MARIBETH

6:47 Okay.

KIRSTEN

6:49 Well.

JANINE

6:50 We are even still setting up a time with Viewpoint which is a trimble products, and then Microsoft dynamics. Okay?

MARIBETH

7:00 Hello. Alright. Those, all four of those would be options for us to set up an integration. Our recommendation probably have those four in tact.

*--- Accounting integrations ends ---*

MARIBETH

7:13 Would probably be the leader there, a really modern application. And if you guys are looking for, you know, platforms that will help to future proof your business so that you don't have to do a whole rip out and replace in the near future, intact is a really good option for that. Actually. Medical is also a really good.

JANINE

7:32 I have a question why you would think that because we just got done with the Sage intact. My understanding is... is technically, it's still in the beta and it's not actually out for generally use until next month. They don't have a payroll on top of it for the, this is the construction site. So I get the impact has been around for quite some time but like they still don't have an internal payroll and the construction side of things with us every retainage, all that other stuff. So, so thanks turns in my world with Sage intact.

MARIBETH

8:08 Okay. Yeah. I mean every business is different and I mean, you, I mean, you're doing the right thing by evaluating more than one platform for sure. There's no, no question about that. And ultimately, you know, you guys need to determine what your priorities are and what's gonna be best suited to... to... to work for your business. So, intact is not in beta, the payroll piece is the... the construction pieces, but you guys around 300 stage 300 now, right?

--- Accounting integrations ---

JANINE

8:36 That's correct?

MARIBETH

8:37 Okay. So, it's my understanding that the Sage, 300 construction components, the intact piece is going to be very similar to the seats 300 peace.

JANINE

8:51 Gotcha.

MARIBETH

8:53 But yeah, I mean, if... if you don't think that they're ready for you yet, then by all means, look at.

--- Accounting integrations ends ---

JANINE

8:58 Well, I was just curious, were you having a construction software and a lot of people? I may have stated it's supposed to be a great... great products when... when talking to Sage or like, yeah, we haven't even gotten that. It hasn't been used for general. So it's just kind of, it's interesting where it seems like it's got a name for itself but that construction component isn't necessarily 100 percent have been slowly just yet. So she's trying to more or less just ask, you know, whereas a sucker at yeah,

because I'm like man, maybe we need to bypass the, see the Sage side right now of the construction module because it looks like the... the standards in taxi. It has to be doing a great job. It's just... wondering. I didn't know still in beta testing on that construction.

MARIBETH

9:51 So, what is your timeline to make a decision for the accounting piece?

JANINE

9:56 Beginning of April?

MARIBETH

9:57 Okay. Alright. Okay. So we have made some enhancements to payroll. I'll talk a little bit about that engineer. And just... just so you know, we are, we're not a construction software. We're actually a service platform so we can help with things like project management and projects that fall into the service side.

*--- Accounting integrations ---*

MARIBETH

10:18 But for construction, we would recommend something like a construction accounting system maybe like stage 300 or in tact with their construction piece. Pro core is a partner of ours and we have a lot of shared customers were using pro court for on the construction side along with an integration to... to service trade.

*--- Accounting integrations ends ---*

MARIBETH

10:39 So, so kind of the approach that service trade takes in the market is, you know, we're a best in class system. We... we definitely don't claim to do everything for your business, but, you know, if you can kind of piece together best in class systems like intact or act America, service three pro core and... and kind of have create multiple systems to create a comprehensive business approach that's kind of where... where we position ourselves in the market. So with all that being said, I know you guys are using Sage 300 along with SSO and I'm Kirsten, it does sound like kind of the last time we talked to you and... and looking back at the notes from that... that, you're having some of... some of the same challenges that you were having a year ago.

*--- Accounting integrations ---*

MARIBETH

11:27 Not much improvement on that side of things is as it relates to, you know, user friendliness, the number of clicks, the number of... of kind of per referral programs that you're using like outlook and excel and things of that nature.

*--- Purchase decision ---*

MARIBETH

11:42 So I'd love to just kinda get a better understanding from you what you're trying to accomplish by moving away from the SSO piece and what your priorities are, so that I can focus on that during the demo today.

KIRSTEN

11:55 Yeah. So, yes, same frustrations. And now we have even more technicians.

*--- Accounting integrations ---*

KIRSTEN

12:01 So it's just even more frustrating. So right now, the biggest frustration obviously is that our service management does not integrate with accounting since we are switching accounting software. We kind of decided back then we weren't going to fully integrate. So, I know there's probably a lot of things SSO can do, but because we are integrated, we cannot do those things.

*--- Parts management (inventory) ---*

KIRSTEN

12:24 So the biggest thing I'm kind of looking at going intuit is not only obviously integrating with accounting but being able to... to track refrigerants, a big one and track inventory would be awesome to track the guys inventory on there man's... and then those are like my two biggest... biggest ones.

*--- Accounting integrations ---*

KIRSTEN

12:48 Obviously payroll will be a big one. I do know, I remember, I liked, I mean everything about service truth is very cool. He's it all worked very well together. So just making sure that I guess that integration with accounting payroll goes through, we're able to track refrigerant, we're able to track inventory stuff of that nature.

*--- Accounting integrations ends ---*

MARIBETH

13:08 Okay. Tell me... tell me a little bit about. I took a look at your website and like I said, I did take a peek at the notes from the last time around but you are, I'm doing a lot of preventative maintenance. Is that right?

KIRSTEN

13:22 Yes.

MARIBETH

13:23 Okay. And that's one of the... the existing challenges that you have with... I'm, just gonna use the term stage is kind of a blanket for Sage service manager and SSO, but it sounds like you're having to go outside of that system in order to know when your customers or do.

--- *Accounting integrations* ---

KIRSTEN

13:43 Yes. So right now we're using outlook and we just have on the very first day of every month, we have a list of the preventative maintenance is that or do that month?

--- *Accounting integrations ends* ---

KIRSTEN

13:53 So that kinda just gives us a reminder of, hey these maintenance is are due this month. We need to try to make sure we work, I'm in but obviously that also leaves room for human error. So we have trying to be proactive and when those lists come up when we go and we put them on a technician schedule. But I'd be really nice and have to not have to do that I guess and just kind of have them auto populate or have them send us those reminders... and kind of do that stuff more through the program instead of getting an outlook reminder and then having to go in and add everything... and adding equipment list would be really awesome... billing.

--- *Accounting integrations* ---

KIRSTEN

14:31 I guess I forgot that one that's a huge one right now for billing. We since again we are integrated with accounting. We go through service management and then we have to copy and paste all the technicians notes into the billing module of stage and then build that way.

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

KIRSTEN

14:47 So there's a ton of double triple entry at times. And then I did meet with bankers and we tried to work through the SSO billing and there is just for some reason on their billing in, you can only have two line items. You can only have labor and material or three and the earn one.

--- *Parts management (inventory)* ---

KIRSTEN

15:08 We list as consumable that or we use like vacuum pumps, nitrogen refrigerant, we'd like to line item though. So some of the bills might have four or five line items. I'm just so the customer can see the breakdown of refrigerant, how many pounds we use with total prices of that, and then tool usage fees like a vacuum towards fee.

KIRSTEN

15:26 And he pretty much, I mean, of course, this was a year or two ago, but yeah, he pretty much told me after an hour that's not gonna happen. You have this third line, you have labor material and you have the third line and you can change the third line to whatever you want. But the third lines all you're going to get. So that was a pretty big hit to us. So that would be an interesting side I guess to see on the billing aspect of what all you can add.

MARIBETH

15:52 Okay. Yeah. I mean as it relates to that, you kind of have options in deciding the level of detail that you want to show your customer.

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

MARIBETH

16:01 So, you know, we have some of our customers absolutely don't want to itemize something and just want to send a grand total. And when you can do that or if you want to itemize every single thing, you have the ability of doing that on both the quote or an invoice.

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

MARIBETH

16:16 But it sounds like what you're trying to do is provide a certain level of transparency and understanding for your customer. Is that ultimately, what you're trying to accomplish with that?

KIRSTEN

16:29 Yes. Yeah.

MARIBETH

16:30 Okay. As it relates to the customer, what else do they see? You mentioned technician notes, get copied and pasted, what... what type of besides itemization, what type of on information do you want to be able to provide your custom?

--- Accounting integrations ---

KIRSTEN

16:51 Well, just the service notes. So from SSO, they are able to provide a report to the customer. It just doesn't translate over to our billing. So we can't invoice through SSO, but they can, I do like that option on SSO too. And I believe it was an option on service trade.

--- Tech time tracking ---

KIRSTEN

17:08 But when they go to submit the report to the customer, they are able to click X on things and take them off of customer viewable before they actually submit that report. Not that most of them ever looked at even do it. They just probably hit submit, but they are, they do have that option if they wanna take like if they don't want the customer to see the labor hours, but again, we don't we're very transparent with that.

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

KIRSTEN

17:31 We don't necessarily itemize the hours on the billing that we do through billing. But if that was something that was done through service trade again, I have no issues with that. It's just one step. We kind of cut out since we have that double entry right now.

MARIBETH

17:47 Sure. Okay. So, so just trying to see some redundancy internally, not necessarily because it's not something you want to show your customer.

KIRSTEN

17:56 Yeah. Yeah. Because I mean that most of them though our hourly charge. So from that, they can gather how many hours you guys were there?

MARIBETH

18:03 Okay. Alright. That's helpful. And... and so you meant?

JANINE

18:08 An inventory?

MARIBETH

18:09 How are you guys tracking that right now?

KIRSTEN

18:12 So, right now, we get an invoice and I have to approve every invoice. And I saved a PDF copy of every invoice and put them in the guys folder and track is check that way. And then we have gels for like small supplies where all of that goes to.

*--- Parts management (inventory) ---*

KIRSTEN

18:29 And then when they use those small supplies on the jobs, I have to go do a direct cost data entry in job cost module through Sage and direct costs that to the job and move it from the inventory to the job.

MARIBETH

18:42 Okay. Where do you hold and how's the inventory?

KIRSTEN

18:49 So they are able to... to just add inventory to their truck whenever they need, like if they need to go by capacitors or any small, just PVC, any type stuff they need to keep on their truck, they can go get that from a part of town and use their truck number as the po, and then it just follows their truck.

MARIBETH

19:09 Okay. Do you know, like could you say okay on truck for I know exactly what sitting on there right now at this moment?

KIRSTEN

19:20 No, I would... I would be able to... to provide the invoices of everything that they have purchased. But again, that leaves a lot of it.

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

KIRSTEN

19:31 And I mean you'll never be able to probably get that aspect out but human error if they don't right? And their notes that they use the small part of piece of PVC or exactly how much they use, we might not capture that. So because of that, we take 15 dollars... and we move that cost to the job and we take it out of that supply, the kind of account for that.

*--- Parts management (inventory) ---*

KIRSTEN

19:55 So every single job that we Bill, we pull from that small tools GL, or that small supply seo. And we move 15 dollars that to every single job, if that makes sense.

MARIBETH

20:06 I think so. I think, I understand. But it sounds like there's some opportunity for improvement as it relates to visibility of what you guys are holding... visibility... visibility of what's being consumed, and when, and then... do you guys have like a main warehouse that your office as well as the rolling truck warehouses?

KIRSTEN

20:34 No, we have like we have specialty tools that we keep an inventory here, but we do not stock parts?

MARIBETH

20:42 Okay. Okay... okay.



KIRSTEN

20:44 Apartment and stuff. It's just by job. So we don't stock any motors, or compress compressors, or anything like that. They would just by that as needed?

MARIBETH

20:52 Okay. So that's... that's helpful. So you don't necessarily need to say I have 100 widgets in where in the main warehouse and I am allocating 20 to the truck. And I need to do like an inventory transfer to a warehouse, you're... you're ordering director job for the most part.

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

MARIBETH

21:11 And... and... and at this point, the guys just have like a blanket po that... that is associated with their truck number.

KIRSTEN

21:20 Yes, correct.

MARIBETH

21:21 Okay. Okay. Yeah, I think that we... we probably have a better process for that, so we can talk a little bit about that too. Okay? That's helpful. Anything else that you all are trying... to... to keep in mind as you're looking at making this transition?

KIRSTEN

21:46 One thing from the last software that I kind of view that I, I've been super low that I hadn't really thought about before is the technicians point of view, too. Obviously, it's gonna be great to keep it easier on our end. But the last one I viewed didn't look great from the technicians view. And I would still like that. I mean, SSO, there's a few things that they don't like, but for the most part, they don't have issues.

--- *Paper process* ---

KIRSTEN

22:10 Most of the issues on our side of the office side. So as long as it's easy for them to work, I do have a couple of other guys that aren't great with technology.

JANINE

22:22 Every...

MARIBETH

22:22 Everyone does.

KIRSTEN

22:24 Yeah, I was like, yeah, I don't think they're going to be able to figure that out and it's gonna cause a lot of headaches. So, yeah, one thing I haven't thought about was the easiness from their point of view as well?

--- Purchase decision ---

MARIBETH

22:35 What, what... what are you guys looking at? Do you mean the last product you looked at? The last time you looked at service trade?

KIRSTEN

22:41 The last product? Sorry, no. The last time we looked at service trade, I don't know that I looked at it from the text point of view, so that I don't think that was ever something I've thought about until this last one. And when I was like, yeah, I don't think they're gonna like that, so.

--- Purchase decision ends ---

MARIBETH

22:57 Hello, sir. You guys looking at?

KIRSTEN

23:00 The last one I've used was actually America service. I was not super through.

MARIBETH

23:06 Okay. Alright. Anything else that you guys have on the schedule?

KIRSTEN

23:10 Hello. Yes, BuildOps?

MARIBETH

23:14 Okay. And you haven't... you haven't checked that out yet?

KIRSTEN

23:19 Yeah, we sat through most of it was just a talking point and we saw a very brief demo. So we're scheduled for another demo?

MARIBETH

23:27 Okay. Alright. Cool. And I'm are you also trying to make a decision on the service side in tandem with the accounting piece?

KIRSTEN

23:36 Yes. So we were all given a date, I mean, a rough date of April eight?

MARIBETH

23:42 Okay.

KIRSTEN

23:42 So, I just have to give them my top list... and then to there it would be whatever probably works best with our accounting software.

MARIBETH

23:55 Okay. By them, you mean the accounting team engine?

KIRSTEN

23:58 Yes. Yes. Yeah. They're... they're in charge of the final decisions. I just have to give them my top list. So what I would prefer obviously.

MARIBETH

24:07 Okay. Alright. And have you guys establish a budget for this part?

KIRSTEN

24:13 No, we have it.

--- Purchase decision ---

MARIBETH

24:17 Okay. Alright.

JANINE

24:19 Man, money to be a factor. We wanna make sure that we get well, we can run... the selection committee, will kind of step in and assist and make sure the ultimate thing is... is kept, would like to make sure that personal lives at exactly what is best for her and her team without the financial planning that decision right now.

--- Purchase decision ends ---

MARIBETH

24:39 So value overprice essentially?

DLANZRATH

24:41 Yup. Yeah.

MARIBETH

24:42 Okay. Alright. That sounds good. Awesome. And let me see it. Was there anything else that I wanted to ask you... Brett? Do you have anything?

KIRSTEN

24:56 You cover just about everything I want to ask? I'm... I'm sure. More questions will come up as we go through and I'll jump in with those though. Alright, cool.

MARIBETH

25:04 Speaking of questions, let's go ahead and hop into the platform itself. And then I just encourage you all. If you do have any questions in Janine, we'll talk a little bit about the payroll piece, and we have enhanced our time card tool. And if you guys do go with Sage, there's... there's definitely with their new payroll module, some additional enhancements coming with the service trade, Sage integration.

--- Accounting ---

MARIBETH

25:31 But can you all see my screen with the service trade dashboard here?

KIRSTEN

25:35 Yes.

MARIBETH

25:36 Okay. So, so just to kind of set the stage and I'm sorry if I'm repeating Matt from last time around, but we are built specifically for commercial service.

--- Accounting ends ---

MARIBETH

25:46 We work with primarily MVP companies and fire protection companies. And ultimately, what we want to help you all do is consolidate and organize all of your service operations so that you can eliminate some of these inefficiencies that you currently have within your processes and some of the peripheral platforms like excel and outlook that you guys are using.

--- Customer engagement ---

MARIBETH

26:09 But ultimately, what our goal is... is to help you leverage technology so that you can deliver a super, your customer experience relative to competitors in your market. So you'll see come up throughout the demonstration that, you know, you, you're... you're hoping to be really transparent with your customers as it relates to invoicing. And we're hoping to help you be transparent with your customer throughout the life cycle of the service. So I'm gonna kinda just give you a quick tour of service trade, how we organize all of your customer data. And then we're gonna dispatch and schedule a job. I'll show you both the office side, the technician side as well as the customer side as well. Does that sound good?

--- Customer engagement ends ---

26:55 That sounds perfect?

MARIBETH

26:56 All right, cool. So what you're seeing here is the service trade dashboard. This is the landing page for the office view when you log into service trade and it gives you a really good idea of what you need to prioritize in your business today, this week, this month. So we can see our schedule for today and what we have going on. If we had any technicians that have clocked into any jobs, we would see their locations and their clock events over on the map. On the right hand side, looks like it's... it's a little bit of a slack Monday at surface it today. So I can see any overdo jobs that don't have appointments that we need to kind of get on top of and get ahead of some jobs that are upcoming in the next couple of weeks that needs to be scheduled jobs that are ready to be marked complete. So this is an instance where the technician has gone out and done all of the work, completed the service in the appointment related to the job.

--- Tech On-site ---

MARIBETH

27:54 But now there's an opportunity for the office to review this work before, you... you know, invoice the customer, so that you can make sure everything is accounted for. And then we also have jobs that are completed that are ready to be invoice. So that's kinda the landing page and... and kind of where you log into service trade.

--- Recurring maintenance ---

MARIBETH

28:13 And then the way that we structure all of your customer data because we are built specifically for commercial service, is that the top of the hierarchy we have the company and this piece that's the Denver public school system, and then each location or say that you service, where... where you're actually delivering the service.

--- Assets ---

MARIBETH

28:33 So today, we're going to be working at. I already have it open Wiley elementary school. And on the location site is where we house all of the relevant information related to this particular location. So the first thing I'll mentioned because I think you said that you're not able to track equipment, your customer equipment, in your existing platform. Is that what I heard?

KIRSTEN

28:57 Yeah, I'm there's certain ways to add it. It's just, we, it's just kind of a pain. It's not as user friendly. So we haven't started that process and we're looking to switch.

MARIBETH

29:12 That makes sense. Do you have a list?

JANINE

29:15 So customer equipment?

KIRSTEN

29:16 Somewhere... we have some of them, but that would be something where we would probably we have like filter and belt list.

*--- Recurring maintenance ---*

KIRSTEN

29:25 And then for customers we've had for sometime, we might have the equipment list, but that would be something at the beginning of switching software. We'd probably have guys as they do the preventative maintenance agreements, gather that information.

MARIBETH

29:38 Love it. Yeah, as part of the implementation with service trade, at least you do have the ability of setting up your existing equipment list associated with your customers.

*--- Access to information ---*

MARIBETH

29:48 And then, yeah, your technicians can add or edit assets if they're granted that permission. A lot of things and service trade both from the office and the technician side are permission based. So text to trust together that information. They can go ahead and turn that on for them and those users that you don't you might want to turn it off.

*--- Assets ---*

MARIBETH

30:08 But we'll check your make model serial number. And in fact, I'll just go actually let me go into this train units because we only have maybe a quarter of the fields that are associated with this asset completed. So make model serial number, belts, sizes, filter quantities, warranty, dates, things of that nature. You also have the ability of adding attachments to service trade. So that could be a job attachment, location attachment or an asset attachment as well. So if you want to tie a manual to a piece of equipment for your time mission of reference out in the field, they have the ability of doing that.

*--- Recurring maintenance ---*

MARIBETH

30:47 And something that's really important to consider is all of the services which is the commitment of work, that could be a reoccurring quarterly, monthly annual service. It could also be a one time repair. Also all of the work orders or jobs and service stream. Those all fall at the asset level.

--- Assets ---

MARIBETH

31:07 So all of that history that the technician is collecting out on a work order falls on the location as well as the piece of equipment. So I can easily pull up that asset, determine what's been done on it, how many repairs have been documented? Do we have any quotes that are related to that particular piece of equipment?

--- Deficiencies ---

MARIBETH

31:24 So you can really drill down to Mueller detail as it relates to your work history both in the office and in the field. We also have all of the repairs which I had mentioned. The term that we use for a pair documentation is deficiency. And that's something I didn't really ask you about, you know, kind of the core.

--- Customer engagement ---

MARIBETH

31:48 I mean one of the backbones of service trade is... is what we call a deficiency to repair loop? Essentially, that just means your technician documents or repair, notifies the office... office has all the details around that sends a quote out. What is your process to ensure that you guys are maximizing all the pull through revenue from those preventative maintenance agreements?

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

KIRSTEN

32:12 So right now, the guys, we have four account managers which basically sales guys and each... each of our customers have an account manager who handles all those quotes. So right now the guys will send an email with photos, what they found, any information pertaining to the quote, most of the time logo ahead and get the parts quotes and the pricing to the account manager. And then at that point, the account manager, I'll take that and turn it over to the customer.

MARIBETH

32:41 Via email like a PDF.

KIRSTEN

32:44 Yes. So right now they use a word, and then we have like a word template for quotes and then they'll print PDF it and send that.

MARIBETH

32:53 Okay. And then how does the customer approve it? Do they have to like print signs, scan email back or what's that?

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

KIRSTEN

33:00 I guess so for some customers, obviously, if they've been long longstanding customers, that might be a verbal approval, some new customers that we don't have those standing relationships with. And there's a lot of space at the bottom where they sign it and then they'll email address or fax it back.

MARIBETH

33:19 Okay. Alright. So I'm so that's good to know. And... and do you guys feel like you're you... you have some opportunity for improvement as it relates to either the process or at least kind of tracking? Like how do you know what still outstanding? How do you know what you have captured? How do you measure that pull through revenue?

--- Paper process ---

KIRSTEN

33:42 Absolutely. I feel like we are living in the nineties most of the time... as far as technology and what we can and can't do. Yeah. I mean, even going back to like the inventory thing where I said there's a lot of room for human error. There's a lot of room for human error this way to and our account managers, I know a couple of them have a lot of customers. They've been here a long time. So when we're looking for that work, one of our guys will say, hey, I turn this over, you know, to one of the sales guys. I never heard back. And then you go to ask the sales guy and he... he forgot about it. He dropped the ball. He... he didn't even get that quote to the customer. So then our guy might not have work. And so absolutely, yeah, there's definitely room for improvement.

MARIBETH

34:26 Yeah. And then... and then, you know, as it relates to that that's... that's not only potentially lost revenue but perhaps the dissatisfied customer because maybe their system as an up and running as... as kind of how you promised. So.

--- Paper process ends ---

KIRSTEN

34:41 Yeah. And to that end, I mean, we have customers call and ask about their quotes and then you have to get with the account manager. So it doesn't even come from guys. It also comes from customers themselves calling to check up on the quotes.

MARIBETH



34:54 Okay. And then... and then the account manager has to like dig through their email or do they keep like an excel?

--- Quoting ---

KIRSTEN

35:00 Yeah. And we have one who isn't very good with emails, so he might ask us to resend it or the technician to resend that.

MARIBETH

35:07 Always one.

KIRSTEN

35:09 Yeah.

DLANZRATH

35:09 Yeah.

MARIBETH

35:11 All right. Well, well, that's good to now. I'm going to show you that process. But before we do that, I'm actually going to go ahead and get a work order scheduled because I actually haven't scheduled the job for this.

--- Recurring maintenance ---

MARIBETH

35:22 So since you all are doing a lot of preventative maintenance you... you saw here on the work on the location, that we do have a couple of quarterly services that are do here in March. And the way that you can make sure that you're staying ahead of the game on that and being as proactive as possible is the...

KIRSTEN

35:38 Well.

MARIBETH

35:39 What we call a service opportunities report and you can pull this up to 90 days out. So if you want to plan all of your work for, you know, April, then you can certainly go ahead and get that on the calendar. But for this month, I'm gonna go ahead and pull a report and see what I have going on. And down here, I have this Wiley elementary and I've got a couple of things and I'm actually gonna take some of these offer here and just do these two services. So I have for services, do it's, gonna show me that and my technician or two technicians can accomplish all that work in one visit. Great. Let's go ahead and make one per quarter from it. You do have the ability of adding scheduling notes. So I could say maybe don't send Jack so that when I'm dispatching this job, we know that he may be either doesn't have the right certifications or doesn't have the best relationship with the customer, I can see that

this is a recurring service. So I'll categorize this as a preventative maintenance job. You do have the ability of assigning both preferred technicians as well as your sales manager. So your account manager can be tracked and service trade as sales.

DLANZRATH

36:49 So that...

MARIBETH

36:50 They can pull all of the customer information, quote information that's related to, you know, that the accounts that they manage so they'll have access to service trade as well as your... your administrative team at... at no additional cost.

*--- Recurring maintenance ends ---*

MARIBETH

37:05 So you can have unlimited salespeople and... and administrators. So I'm gonna go ahead and create a work order here. Now, I can create, won't create all of my work quarters for all of my services that are due this month. I'm not gonna do that because all 45 salespeople demo out of the same account and people getting out about that sort of thing.

*--- Recurring maintenance ---*

JANINE

37:28 But you do have the...

MARIBETH

37:29 Ability of kind of saving time and bolt creating all of your work.

JANINE

37:32 Orders. And there was a couple of.

MARIBETH

37:34 This is that I'm going to find that information. Once I create this job, I'm gonna see it on the location page here's. An unscheduled service. This is the job. I just.

*--- Dispatch ---*

JANINE

37:45 Then you also?

MARIBETH

37:47 The ability of going to what we call our map based scheduler.

37:51 And...

MARIBETH

37:52 I can see all of my jobs that are assigned to a specific person. I have my technicians here listed on the left hand side and color-coded I can see this is already assigned to myself. This is a drag and drop system. I can drag it onto the schedule answer the day that I want to schedule it or I can just go ahead and add an appointment right here. So we also the dispatch board that's going to be used for more reactive work and we can talk a little bit about that.

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

MARIBETH

38:25 But what I'm gonna do here is just access this work order. And I can see here's my services that I just pulled from my service opportunities report. If I want to add another technician, I'll add Brett to this and he'll come along with me. You can see that we already have some items here on this war quarter.

--- *Quote templates* ---

MARIBETH

38:45 This is what we plan to consume. So you mentioned quote templates earlier, which is like the word template. And we have that ability and service trade as well. We also have the realty of adding what we call service templates, which can be the scope of work and you can tie these items to the templates.

--- *Dispatch* ---

MARIBETH

39:02 So your technician knows, hey, this is what we typically use for this type of PM. So make sure that you have this on your truck or that you have it on hand. The other reason why this is important is if you guys want to create all of your jobs for the month of April and pull a report that says show me all of my jobs and all of the items that I need.

--- *Parts management (inventory)* ---

MARIBETH

39:24 Like what filters am I going to need to have on hand? What belts am I gonna have to have on hand? You can kind of be more proactive pull a report of everything that you're gonna need to ensure that your technicians have all of that on their truck. Does that all make sense so far?

--- *Access to information* ---

KIRSTEN

MARIBETH

39:42 Awesome. Cool. So, I've got this scheduled for today. And what I'm gonna do is I'm... I'm gonna go ahead and move out to the field when you're making a same day change like this. Your technician is gonna get a notification and then their appointment list is also gonna have the I'm... I'm working on an iPad today. We're android or iOS supported. Do they have devices out in the field already?

KIRSTEN

40:10 Yes, some of them have ipads... ipads or offer to all of them, but some of them prefer to work off of their phone, okay? And did not want to an iPad. So it's just kind of preference.

MARIBETH

40:21 That's fine. They don't need to be on the same device. They can... they can use, what kind of their preferences. We have some people who love to use their phone. It's great for taking pictures and documents documenting that sort of thing. So, yeah. Then I'll... I'll have to be on the same thing. But on the iPad, I can see that I've got a couple of appointments today.

--- Assets ---

MARIBETH

40:41 I have this Wiley elementary school and this is going to show me the same services that we saw back in the office. So I have a refrigeration and then each back service timecard. Any comments that your technician may want to share with the office or with the customer, they have the ability of doing that. I'm gonna record or location comment and say that there was an access the code here. And for every future job that you guys schedule at this location, we're going to see, hey, there's an access the code, senior technician is gonna know what they need to do. Once they arrive.

--- Deficiencies ---

MARIBETH

41:16 I'll go ahead and save that back under the deficiency tab. Again, this is the... the term that we use for any type of repair. This is the first snapshot of history that your tack is gonna see while they're out in the field. They'll see any past repairs that were previously documented. And then down here at the bottom, I can easily add a new one. So I'm gonna say that there's a broken compressor on this. They came unit and they don't have to be super descriptive here because it's just an easy process that kind of walks them through. Alright, let's go ahead and take a photo, snap a picture. I can take a video demo. I can record an audio on them out of this particular piece of equipment, making a weird noise. I can pass that along to the customer to give them a better understanding of what's going on and... and kind of enhance that transparency that you're trying to offer. I can also use this to just say, hey, these are the parts that I need. This is how long the repair my team. I'm gonna mark this as an operable piece of equipment. And then I'm gonna tie it to that asset or the piece of

equipment that I'm working on say, which is the day can unit? This is a list of service lines you guys are gonna see plumbing H, back controls, the things that are only applicable to your business. And then once I mark this as a new.

KIRSTEN

42:37 Hello?

MARIBETH

42:38 Hi, there it's gonna notify the office. You also have the ability of if... if it's something smaller like a thermostat replacement, your tech as the time and the parts. Maybe I do not exceed. They can go ahead and we'll get this fixed. We still want them to go through that process so that they are continuing to log all of that Rich history on that particular piece of equipment. So, any questions about the repair documentation, piece of it?

--- *Deficiencies ends* ---

KIRSTEN

43:06 Hello, think so. It all really good.

MARIBETH

43:10 Okay.

JANINE

43:12 The...

MARIBETH

43:13 Technician, once they... document that I mentioned the office or the sales team, maybe the account manager is the person who wants to get a notification for that sort of thing. It's gonna get an email that looks just like this.

--- *Deficiencies* ---

MARIBETH

43:30 You can also see it on the work order, of course, but we call it a deficiency detailed email and it's gone to my inbox. They can go to the account managers inbox with the description of the issue. The unit that it's being reported on here's. The job that it's originally associated with here's, my salesperson. So that's also who got a notification. And then of course, in the office, we're going to show you any deficiency history or related deficiencies. So the email that you're always making the best motivation to your customer. And that if this is an instance where maybe we need to be recommending a replacement or maybe... maybe a bigger ticket repair, we have all this documentation to show the customer of what's previously happened on this unit. And then of course here's the attachments that the technician documented out in the field, so that we can have a really good understanding of what's going on from here.

--- *Quote templates* ---

MARIBETH

44:31 Your sales team or account manager can go ahead and create a quote. I can include an expiration date. I can update any guaranteed misspellings that the technician is gonna report out in the field. And then I mentioned, we also have quote templates as well. So for any common repairs, those word documents that you're really using, we can get those into service training and that'll be your verbiage whatever you currently pass along to your customer. Here's, these items that we typically use for this type of repair. And then I can edit this, of course, so I can make any updates that I want to. And I can also review all of my pricing. So we have our account detailed here to show grand total.

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

MARIBETH

45:19 Maybe I want to show the line item with the detail or maybe I want to show the line item with what we use but not line item pricing. So you... you have some flexibility here as it relates to your customer. And then we also have pricing contracts. So the pricing contract is what dictates the markup rule.

KIRSTEN

45:38 Hello?

MARIBETH

45:38 So, we'll take your standard items list. We'll get that in the service stream will track your standard unit cost. We'll show you your margin down here. And so if I update this, I can see it's a little bit different but the pricing contract or what you've negotiated with the customer, we can get all of those rules into service trade to apply to both your quality on your invoice. It.

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

KIRSTEN

46:04 Awesome.

MARIBETH

46:05 And then once this looks good, of course, you guys are gonna see the gross margin, your customers never gonna see that. But once this all looks good, I can go ahead and send a copy of this over to the customer. So, Christina, I'm going to send a copy of this over to you. And then I'm for Janine and Dan, I'll pull this up on my screen. But Kirsten, do you have access to your inbox?

KIRSTEN

46:29 Yes.

MARIBETH

46:30 Okay. Just ignore that... that logo. I did that for a demo earlier and forgot to change it out. So this is going to be branded for your business, whatever description of work I am. I kind of glossed over it. But if this audio memos for internal purposes, you can shut all that off to your customer. Never sees this information by the itemization of quotes is helpful, but customers are gonna really understand what's going on. I know that you're providing the pictures as the attachment but this is just such a more consolidated way of them to one compile the quote and send it to the customer.

--- Customer engagement ---

MARIBETH

47:15 And then additionally person you'll notice that your customer doesn't have to print sign scan that's that is not what we call a frictionless experience for the customer. It's a lot of steps. It's a lot to overcome for the customer. So we wanna make it super... super easy so that they can just approve online if they have a po number that they need to provide you, they have the ability of doing.

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

MARIBETH

47:41 Now, they have to check your terms and conditions. And then once that's approved. And I'll see if you've done anything with it on your end. I can see that you've viewed it. But if you want to go ahead and approve it or request changes, I can show you what that looks like back in the office.

--- Quoting ---

MARIBETH

47:58 But we do give you a digital trail of all of the history related to the flow, who compiled it, who sent it, and then on the customer side who's viewing and taking action on it... alright. And I can see that you approved it. So once I refresh this... this will go from the submitted status to the approved status and then your sales manager, or is it... is it the account manager who's scheduling the followup job? Or is it someone out?

KIRSTEN

48:29 Once it's approved, they turn it over to us and then we would schedule it with the guys.

MARIBETH

48:36 Okay. Okay. So they don't really have to turn it over to you anymore because you can actually pull if you don't want them to, of course, they can notify you if you want them to, but you can pull a quote report and you can say, okay, show me everything either that's in the submitted status from an account manager perspective that needs to be followed up on. I can send these one by one with a personal note or I can bulk send these out to all my customers or your dispatcher, whoever is going to be scheduling can say, okay, show me all the quotes that are approved and they can go ahead into each one of these and they can go ahead and schedule the job.

--- Quoting ends ---

MARIBETH

49:27 So, what... what are your thoughts on that process as it relates to what you guys are currently doing?

KIRSTEN

49:34 It's way better. And it also would be nice to track what all they're doing as far as a sales guy. So that would be really awesome.

MARIBETH

49:45 Do you what? I'm curious what you think your customers would think that... that process?

KIRSTEN

49:52 I know a couple of them might not like it because they're the older generation, the like the old school stuff, but I think for the most part, I think it will be really good.

MARIBETH

50:03 Well, here's go ahead.

KIRSTEN

50:06 I was just gonna say, I think they receive it very well.

MARIBETH

50:09 Good, good. The thing is... is if you have old school customers who just wanna call and pick up the phone and say, yes, just do this work. You can of course, approve that from the office side as well. You know, what? We can kind of think of this as is, you know, Amazon has obviously set the standard for making it super easy for you to do business with them. You know, they have that... that by now, but in, I mean, I haven't met anyone who hasn't fallen victim to that. I know I just spent a bunch of money on Amazon yesterday and it's super easy. And then what happens is I gotta notification this morning, hey, everything and shipped out your delivery is scheduled for tomorrow.

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

MARIBETH

50:57 So they've kind of condition consumers... to... to receive information that way and to interact with their vendors. And that way as well.

KIRSTEN

51:08 Yeah.



DLANZRATH

51:11 I have a quick question when they would go to approve a quote, some of our customers actually have like a, I guess like a po, PDF kinds of, would there be a way where they can attach that one, they approve that? Or would they have to send that in a... in a follow up?

--- Quoting ---

MARIBETH

51:31 Do they have to send that to each and every time they're approving a quote or is it just like, hey, here's our po document for all of our jobs for this year?

DLANZRATH

51:41 It would be on a... on... a project based situation? Yeah.

MARIBETH

51:51 So, at this point, customers don't have the ability of adding that attachment. But if you guys, if they, you... you can add it to the quote from your side... it's kinda purposeful not to have customers add these attachments because who knows what they'll end up doing within your system. So we kinda leave that... that control to you guys, but they can certainly add in their po number, and you can also require that from your customers before they're able to approve that... that quote.

--- Quoting ends ---

DLANZRATH

52:26 Okay.

MARIBETH

52:27 What other questions do you have?

DLANZRATH

52:36 Yeah. I mean, they'll come in, I'll make more... more of a comment at a question. Is it looks incredibly fluid as far as from start to finish, you know, just from creating something from nothing seems very easy and intuitive.

MARIBETH

52:59 Yeah. You know, one of the things that kind of sets us apart is that we are not looking to be the vendor for everyone.

--- Type of work ---

MARIBETH

53:10 So, for instance, you know, if... if a strictly residential contractor calls us and says, hey, we're interested in service stream, we send them somewhere else. If

someone who does pest control, janitorial services reaches out to us, we send them somewhere else. So we know who we're a good fit for.

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

MARIBETH

53:30 And the good thing about that is all of the development for within our platform is geared specifically for skilled commercial service providers. So like I said, that... that MVP the fire protection. So, so we have a very kind of niche market, but we're okay with that because that means that we're going to be the best fit for the people that were going after and it... it creates some longevity as it relates to how long our customers stay with service trade.

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

MARIBETH

54:06 So, but that's good feedback. Cool. I noticed, I realize that when I... when I pick up to this job, I never clocked in and we had talked about payroll and stuff. So I guess I wanted to point out you do have the ability of clocking in for job prep in route and on site. So you can capture those three different categories. When you clock in... in route, your technician can if they choose to notify the customer, have their expected arrival time. And then all of these compliments fall on the work order back in the office as well so that you guys could use that data to help calculate your... your payroll.

*--- Forms ---*

MARIBETH

54:48 And we're going to circle back around the payroll. But before I do that... do you guys have like PM, checklist tasking sheets, things like that... that, your technicians, I think I saw something about inspection form sometimes go over to the customer. Is that right?

KIRSTEN

55:06 Yeah. So we have the tasking list and that goes based off of the preventative maintenance agreement that the account manager cells.

*--- Assets ---*

KIRSTEN

55:13 So once you solve that, we take his information, he usually has a detailed list broken out by either piece of equipment or more often times like just a general rooftop units here's. What we're gonna do on your rooftop units for your chillers, you, and what we're gonna do.

*--- Forms ---*

KIRSTEN

55:29 So we'll add that directly from the quote onto their tasking list... and then we'll send them a copy as well of the entire agreement.

MARIBETH

55:42 Okay. And are they the tasking list? Is it something like there's a couple of ways to do that and service trade? So you can put this as the scope of work on the service, or you can also get that as a billable form. Like, do they have to go in and say, yes, I did this. Yes, I did that. Do they have to like physically check those things off?

KIRSTEN

56:04 They're suppose to, do they know?

JANINE

56:09 Not...

KIRSTEN

56:09 All the time? Okay. Do you have the option?

MARIBETH

56:13 Okay. Well, if you'd like you have the ability of getting specific tasking list inside of service training. And essentially what we can do, we'll take whatever you guys want to use or are currently using. We can get that into service trade as a billable PDF. And then we can map different fields over from the data that you have in service trade to the data that you want to fill on the form itself.

--- Assets ---

MARIBETH

56:38 We can pre-fill the asset information, more information, customer information, tech, name, date, job number, things like that. And then they can go through check a box, all of this stuff. And then when they go to attach this to service trade, it's gonna say, hey, this is the job you're currently clocked into.

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

MARIBETH

56:56 Is this the job attach it to? And I'll say yes, and I'll upload that. And then it's going to tie as an attachment onto the work order so that you guys have an option of sending that to the customer if you want to, or if it's something that you use as part of your internal review process, then you'll be able to... to view that.

--- Assets ---

MARIBETH

57:15 I'm in the office as well. And then the other thing I'll just know is, you know, you mentioned, hey, we don't have all of our equipment information. Your customer or your technician can easily add an asset. They can go in and edit an existing asset if they want to enrich some of the details that you've already captured.

--- *Parts management (inventory)* ---

MARIBETH

57:37 And then they can also go in and add items. So let's talk a little bit about that since I know guys are interested in the inventory piece. So within service trade, you have the ability of tracking consumption. Now, anything that you guys use? Like I said, that's part of your maybe standard list.

--- *Quote templates* ---

MARIBETH

58:00 You can get that into service trade and it'll automatically fill in. So I think I have a widget in this account. So yeah, I do. So this will pre populate here and I can go ahead and add that. It doesn't look like we're tracking a standard unit cost for it.

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

MARIBETH

58:15 You have the ability of doing that or I could just say, okay, I picked up a couple of these. I purchase them at 14 dollars. And then you also have the ability of sourcing this item. So I can say, hey, I pick this up at a parts vendor. I went by abc parts. I use purchase order I guess is zero zero four, let's say for their truck number, I can track the status of these part. So if this is something that I received degree, it's already on my truck. Cool or I'm... I'm tying it right to the job right now so I can... I can track that information. And then I can choose whether it's visible to the customer. I'll go ahead and add that back. And I can see here's, my po number here's. When I used it on here's. How many I purchased, you also have the ability of if this is something that they.

--- *Parts management (inventory)* ---

KIRSTEN

59:13 Whole.

MARIBETH

59:13 Off of their truck. So I'm... I'm actually just gonna use widget again, see that you can see what that looks like. I can track this to a specific warehouse and say I pulled this off of track one and I can add that to the work quarter. So we're tracking specifically consumption.

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

MARIBETH

59:34 There is an opportunity to enhance this process with something that we call parts ledger. So we have a suite of products service straight. The core product parts ledger gives you the ability of generating purchase orders. So you can do that either from the office or there's. Also a mobile application where if you want the technicians to be able to create purchase orders, then they have the ability of doing that in the field, they can only generate a purchase order from approved vendors.

--- *Parts management (inventory)* ---

MARIBETH

1:00:05 So if they're going by home depot and they're not approved vendor of yours, they can't create a purchase order there. Does that make sense?

KIRSTEN

1:00:15 Yep.

MARIBETH

1:00:15 Okay. So typically, what we recommend is you don't really necessarily need to eat the elephant. We, I mean, I'm a salesperson, I'd love to sell you every single one of our products right off the bat, but I've kind of learned that it is a better experience for our customers to on board with service trade first and then tie on the parts ledger piece. So get really comfortable with changing your core operating system before you start kind of... you know, implementing another application. There is an integration to talk to one another. It's really easy in terms of like updating the... the cost information and the po information. But if you're interested in a more enhanced process, then I can send you some documentation about parts ledger.

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

MARIBETH

1:01:03 And if you want, we can schedule a follow up demo to kinda show you how that works. In the meantime. Okay, go ahead, sorry.

KIRSTEN

1:01:16 I was just gonna say, I think I'll be okay for now. I mean look obviously better than what we have now which is nothing.

MARIBETH

1:01:27 It's okay. We'll help get you there. And it's funny that you say you have nothing because you... you do have a lot of systems. They're just not working very well.

KIRSTEN

1:01:41 Pardon to each other. Yeah.

MARIBETH

1:01:43 Yeah, yeah. So, you know, it's I mean, we've talked to customers and prospects all the time, who, you know, they're like, hey, we purchase, we want to use technology. We understand the benefit of technology, but not all technology is built for... for kind of what you guys do. So. Okay. So any questions around like technician, adding par, sourcing part, services paperwork? What questions you have from technician view?

KIRSTEN

1:02:14 No, that all looks good.

MARIBETH

1:02:16 Okay. Cool. So, do you have your text to get like a... like a customer signature before they leave? Say?

KIRSTEN

1:02:25 We have, we just have one site where signatures are required by them. The only time they used to, we would ask them to get a signature was on residential back when we used to do residential because they were so hard to get payment from.

MARIBETH

1:02:42 Sure.

KIRSTEN

1:02:43 So that would be something that if we had to turn them over to collections that collections would want was assigned service report, which is the one of the reasons why we stopped doing residential. So we don't really require them unless the customer just wants to find service report.

--- Tech On-site ---

MARIBETH

1:03:00 Okay. If you want to, we call it a working knowledge man. I'll drop a copy of this in your inbox just so you can see what it looks like. Your technician can determine what... what they want the customer to see. They can turn some of these things on and off once they've kind of narrowed it down.

--- Invoicing ---

MARIBETH

1:03:17 And by the way, just disregard this generate invoice. There's text with the ability of doing that in the field. If you want them to most of our customers that's a permission be setting that they turn off or their technicians, they do not want their tax generating an invoice in the field.

--- Deficiencies ---

MARIBETH

1:03:30 So they wouldn't see that if that's the case. And then I can review this with the customer and say, hey, Kirsten, I am, I'm out here for these preventative maintenance services. While I was out here, I found this repair, don't worry. I've already notified the office. You should be getting a quote.

--- Tech On-site ---

MARIBETH

1:03:47 The customer will acknowledge that this work has been done. I can drop a copy this into your email. They'll confirm and sign, and then I can email a copy to maybe someone else within the organization if I want to. And then once the test is done with this, they'll go ahead. They'll clock out. They'll say, yes, these services are done. They can leave them open if they want to you and come back to this appointment. But in this case, I'm just gonna go ahead and clock out, get this off my appointment list. And then I've got what I have going on here. I know that we're kind of at a time. Do you guys have maybe 10 more minutes?

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

KIRSTEN

1:04:27 Yeah.

MARIBETH

1:04:27 Okay. So back in the office, I can see that the technician is completed this appointment, the services were completed. I'm gonna see these items that we added from out in the field, this one that has a po associated with it. I can see the status of the part if it was not received that I could go ahead and say, hey, I've ordered it and that's gonna go ahead and give you a different indicator on the job itself.

--- Tech On-site ---

MARIBETH

1:04:59 I can add any additional items that I need to before building this out. I can review my deficiency like I showed you here's, my attachments here's, that work acknowledgement. And then what I can do from here is go ahead and invoice this work order. So I'll complete this job. I can create an invoice, and then this is gonna...

JANINE

1:05:31 You...

MARIBETH

1:05:32 An opportunity to review this again, you can determine if I think you had mentioned earlier, hey, there's some things there's some things that we add to the invoice or to the job that we don't necessarily invoice for. Is that what you said, the 15 dollars or no, that was something that you add to every job?

KIRSTEN

1:05:52 Yeah, that was to kind of account for.

MARIBETH

1:05:55 Consumable.

KIRSTEN

1:05:56 Items?

MARIBETH

1:05:57 Yeah.

KIRSTEN

1:05:58 Hello?

MARIBETH

1:05:59 Okay. You can determine what you want the customer to see on the invoice if you don't want them to see certain things. You can still keep this item on the work quarter, the invoices independent from the work quarter so that your job costing can be all street, but you might not necessarily want to invoice the customer for that.

--- Invoicing ---

MARIBETH

1:06:20 And then once this all looks good... I've got my gross margin down here. All of my items. I have the ability. This is something that's new. Actually. I think Kirsten from the last from the last time you looked at service tree is we've enhanced start invoicing capability. We call it an invoice link. Now. And what's really nice about this is that you have the ability of enabling a pay now option. So, if you want your customers and Janine, just so you know, we set up a merchant account so that your customer can pay in full by AC, H or credit card payment... the... the money can go into the money, the merchant account, and then you can still send the invoice over to your, I was gonna say stage 300. But whatever accounting system that you guys have so that you can kind of reconcile everything with the... with the proper GL.

--- Customer engagement ---

MARIBETH

1:07:17 But what our customers are finding after enabling this pay now option is one, their customers really love it because it's super convenient. And I'm sure you probably wouldn't be surprised to know that people are collecting money a whole lot faster than the east too. So as it relates to cash flow, it kinda helps expedite that in, for that money into the business.



--- Invoicing ---

JANINE

1:07:41 Excuse me, that's for additional fee with who you have set up with a.

MARIBETH

1:07:46 Yeah. I mean, just like any... any credit card payment processing. Yeah, I mean, it's phenomenal if it's something you're interested in, I can send you some documentation around that. Do you have customers who have maybe express the interest to pay online? Or if you guys ever thought about enabling something like that?

JANINE

1:08:05 Kirsten, do you feel like it would be sufficient? I mean we're not in residential. So that's why I guess.

KIRSTEN

1:08:09 You know.

JANINE

1:08:10 I'm hesitant.

KIRSTEN

1:08:12 No, I mean, we have some that do AC H, but we've never had anyone request the pay online and we don't the only commercial customer I can become that pays with a credit card is the army reserve basis. They have their like the column there P cards, anything under 2000 dollars. They pay with a credit card. Otherwise, most of them are checks or AC H.

MARIBETH

1:08:35 Okay. Well, it's available if you... if you do want to enable that functionality. And then additionally, going back to that transparency piece, we send the service link along with... the... the invoice.

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

MARIBETH

1:08:52 So not only are you able to... to itemize this information and really show your customers a clear understanding of what you've used or what you're billing them for, but what you've done as well. So what does all the work that went into this? So here's our preventative maintenance here's. Everything that we've done with the scope of work here's, our files. I've got that work acknowledgement. It looks like Brett attach some pictures to the work quarter when I wasn't looking maybe. And then we also have the indication of, hey, while you're out here, we found this broken compressor here's. A picture of that here's. An audio and then for you to review and kind of just a

little nudge for them to... to... to maybe approve a quote that's sitting in their inbox. What do you think your customers would think about this?

KIRSTEN

1:09:46 I think... I think they like it.

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

MARIBETH

1:09:51 All right. So, I know that we're over time, Janine. I think what I'm gonna do actually before I... before I do this, tell me a little bit about the payroll piece and... and what you did it like the last time around?

JANINE

1:10:07 Well, not mistaken. The last time that we looked at this, it was only able to... to export to a PDF.

MARIBETH

1:10:17 Poor sleigh.

JANINE

1:10:19 So, like it would print and it would only print inside a PDF. There's no export into like CSV or anything like that where we would be able to... to get it out of the system and get it into another, okay?

MARIBETH

1:10:31 Hi, I don't think that's I don't think that's totally accurate.

--- Tech time tracking ---

MARIBETH

1:10:36 Well, you can export all of your data into a CSV files. Let me ask you this. Are you payroll based off of billable time or actionable time, actual time? Okay? So here's what I'm gonna do. I'm going to send you. So the first thing to know is you can export the clock events. It is a data dump into a CSV file. It's a lot of manipulation to kind of use that data to get into your payroll system. Are you using who, who's your payroll provider?

JANINE

1:11:10 We do it internally. Okay? We have five different unions that were affiliated with and then depending on like especially inside of the service side of stuff for Kirsten, is she also has to keep track of territory's inside of each of those unions. So her guy is being sent to let's say the, say topeka Kansas area. It's a different union. So that changes the benefits and all that other stuff and also their pay scales. Okay?

MARIBETH

1:11:39 Hello. It's a very unique.

JANINE

1:11:42 Role system for everybody in the team.

MARIBETH

1:11:47 Okay. So what the information that you're really looking for is how many hours did my technician work? And where was he when he work those? Yeah, I have to.

JANINE

1:11:58 Work quarter associated hours per diem... reimbursement because if they're going into certain places, sometimes we'll have to reimburse them. Kirsten. I feel like I'm missing something.

KIRSTEN

1:12:15 I don't do reimbursements or I mean, if... if service trade have the capabilities, that would be awesome. But right now, I don't have the capabilities within SSO. So like for the premium and on call hours and the reimbursement. I have to do that all via email or right physically on their time cards.

MARIBETH

1:12:36 Okay. So here's what I'm gonna do. I'm... I'm going to send me, we have a couple of videos that show the enhancements that we've made to the service, three time cards. Since the last time you guys took a look at service stream, I think it's going to be a better system than what you're doing now. For a couple of reasons, one technician Clarkson moves over to a time hard. Not only does it show how much time they weren't it links back to the job in service trade. They have the ability of recording expenses. They can record things like pto, if you want them to be able to that, that's totally up to you. It's configured. If... if that's something that you're interested in. And then the other really nice thing Janine, is that you have the ability not only exporting the data but we can export it into a template that will feed into whatever accounting system that you guys move to. So you don't have to manipulate the data every single time it'll export every week or every other week, however you guys pay. And then it'll automatically just be in the format that you need to import it into your payroll system.

JANINE

1:13:51 That works. Yeah. If you can send me some of that stuff, I would appreciate it.

--- Invoicing ---

MARIBETH

1:13:55 Yeah, yeah. For sure. And are... are you guys interested in the piano thing or is that something you think you'll probably hold off on? Or should I send you the... the information about our merchant account and fees associated with it?

JANINE

1:14:10 I would say.

KIRSTEN

1:14:10 Not all.

JANINE

1:14:11 Now... okay.

KIRSTEN

1:14:15 Yeah.

--- *Customer engagement* ---

MARIBETH

1:14:17 Let me ask you guys this. Have you ever considered... have you ever consider giving our customers kind of have access to history, location history, asset history because we have the ability of implementing like a portal. It's tied to your website. This obviously want to be artwork service would be Kruse and branded for your business. And then you can give customers additional visibility into kind of like a self-service where they can see any of today's jobs. This is only related to locations that they're associated to as a contact. They can see all of their work history. They can request service. If you enable that, they can see any repairs that were documented, they can approve quotes. Is that something that would be interesting to you?

--- *Purchase decision* ---

KIRSTEN

1:15:12 Maybe not right away but maybe in the future yet?

MARIBETH

1:15:17 Okay. All right. So I guess kind of have as it relates to next steps, I'll send a recap email. I'll send over the time card tool information kind of a summary of what we discussed. I know that you all have a pretty aggressive timeline for making a decision. What else can I provide you to help with that? And what do you think would be a good next step? Is there anyone else that we need to get on a demo to review this? We're happy to... to... to offer a follow up or I can come on site with you guys and meet with your team on site. If that's something that's interesting.

KIRSTEN

1:15:55 I will probably talk with the team. I mean, I'm feeling really good about this one. The only other one, I still have to sit there with BuildOps, but I knew going into it that I really like your guys, his service the last time. So you already kind of off the top of my list, but I might talk to the team.

KIRSTEN

1:16:15 And then if there was something that someone else wanted to see, I might talk to Lydia because she's an accounting now, but she does have, she wasn't service for like 11 years. So she has a background of service and accounting. So if she wanted to kind of sit through the demo that I might shoot you an email and see if... but I can also, I guess player this back. But yeah, I mean I saw a lot of what I needed to see, you know, feeling really good about it.

MARIBETH

1:16:42 Okay, good. Well, I feel really good about it too. What was your favorite part?

KIRSTEN

1:16:49 Probably the cohesiveness of all of it, just how user friendly it is, how easy it will be to do a lot of the things that we were entering twice or three times. Even. Yeah, I mean just the cohesiveness of everything.

MARIBETH

1:17:07 Alright. Damn. What was your favorite part?

DLANZRATH

1:17:11 Well, if I said earlier just to how everything flows together and, you know, starting... starting from scratch and then getting to a finished product Sim, you know, very intuitive on both ends. So.

MARIBETH

1:17:25 Janine, what was your favorite part?

JANINE

1:17:31 I mean, I'm glad that Kirsten. I mean, Kirsten is the one that has to use it. So her opinion is much more valuable than mine but I mean the biggest thing is... is if we can make this where it's much more efficient for them and that's fewer clicks for them to get their job done especially during the summer winter where it gets really hectic for them that's what we're looking for. Okay? So.

--- Purchase decision ---

MARIBETH

1:17:56 You, you raise a good point. Summer is upon us. What's your plan for implementation with your busy season? Like go ahead go.

JANINE

1:18:07 Is, is in April, we're gonna figure out some efficiencies and where we want to be. It's gonna take us a while especially with some of those open API stuff

independent. Who's who likes what's the best?

MARIBETH

1:18:20 Huh.

JANINE

1:18:21 There's gonna be some coordination associated with the... the selection committee may sit down with each of them to look at their, the option that we're choosing to go with one more time just to ensure that this is exactly what they want. And then after that, I think service will be probably one of the more... more important wants to try and get off the ground running how that lines between summer or after summer that I can't answer that right now. I can. So.

MARIBETH

1:18:55 We, I would say it's a pretty slim chance that we would have you up and running before the busy season. I'd love to say yes, but I'm not gonna promise something that I don't think that we can get done.

JANINE

1:19:08 And I don't want to slap it together. So, I mean, yeah, I mean, they all his...

KIRSTEN

1:19:11 I don't...

JANINE

1:19:12 That's part for percentage that's what she needs to now. Okay?

DLANZRATH

1:19:16 I...

KIRSTEN

1:19:16 Wouldn't want to throw this on the guys definitely until we kinda slow down.

MARIBETH

1:19:23 Yeah. And... and I mean, certainly, if you guys make a decision in April, we can line up your contract with whatever start term date makes sense to you as you can imagine since we work with a lot of MVP companies, the end of the year after... after the busy season, a super busy for us. So it's not uncommon for people to sign and make a commitment move going into their busy season to start that implementation in September maybe or, you know, whatever it slows down for you, but we... we can kind of figure out all of those details on the back end. So... how about should we make a schedule a follow up?

--- Purchase decision ends ---

KIRSTEN

1:20:04 For...

MARIBETH

1:20:05 Once your BuildOps demo?

JANINE

1:20:08 You...

KIRSTEN

1:20:08 Have the product manager for Wednesday or Thursday this week. And then I'll have a follow up service timecard sometime the following week.

JANINE

1:20:22 Follow up, you have to demo scheduled with them?

KIRSTEN

1:20:25 Yeah, we have one on the project management side. So not the one this week is not for service. I'm just sitting in on their demo for the project managers, another project management software.

--- *Type of work* ---

MARIBETH

1:20:39 Okay.

JANINE

1:20:42 Sorry, go ahead.

KIRSTEN

1:20:44 I... I just got to see maybe 15 minutes of a demos. I didn't get to see much on the service side. So I'd have to reschedule that for the following.

MARIBETH

1:20:54 Okay. And we didn't really even talk about the project piece. I did focus more on the PM side, but we absolutely have the ability of tracking all of your project management information, the different phases that you're working in.

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

MARIBETH

1:21:09 You can tie attachments, labor parts, comments to specific phases within the project. You have the ability of creating budgets directly from a quote. You can see,

I'm kind of work in power, address percent to budget tasking lists, things like that. So if that's something that you guys, do you feel like you... you want to dig a little bit more into?

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

MARIBETH

1:21:34 We're also happy to... to... to kind of dive into that, but you let me know. How about I give you a call on Friday once you have an opportunity to kinda marinate on all this information and review the documentation we send over today. Would that work? Yup, what time is good for you on Friday?

*--- Purchase decision ---*

KIRSTEN

1:21:57 Wow.

MARIBETH

1:22:00 And then we can just use that time to like establish some... some next steps if you want an onsite visit with the decision making committee and Janine, just so you know, if you want to hop on a call to kind of talk about what an integration with whatever accounting system is gonna look like. We can kind of talk to you about that too. If that's something that's important.

*--- Purchase decision ends ---*

KIRSTEN

1:22:31 I can do on Friday. I can do any time after 10 30. I have appointments from eight to 10 30.

MARIBETH

1:22:39 Okay. Let's see and you're Central Time, right?

KIRSTEN

1:22:42 Yes.

MARIBETH

1:22:43 Okay. How about... how about we shoot for 11 o'clock it'll just, it'll be like I'll schedule like a 15 minute call just for us to catch up. And like I said, figure out what the next meeting should look like.

KIRSTEN

1:22:57 Okay. Yeah, that's perfect.

JANINE



1:22:58 Alright, cool.

MARIBETH

1:22:59 Any other questions that we can help you with?

KIRSTEN

1:23:04 I don't think so.

JANINE

1:23:07 I share your time.

MARIBETH

1:23:09 We appreciate it. Yeah, thank you. We know this is a big undertaking. So, if you guys think of any other questions between now and Friday, just let us know.

KIRSTEN

1:23:18 Okay. Sounds good.

MARIBETH

1:23:19 Alright. Thanks. Yeah.

KIRSTEN

1:23:21 Thank you.

*The End*